

THE FOUNDATION'S Legacy NEWS

JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

INVESTMENTS FROM THE HEART— The Stein Family's Tikun Olam Foundation

For longtime Jewish Community Foundation donors **Mindy and Gene Stein**, philanthropy is a very collaborative family business where all of the Steins' children have been involved since they were kids. Today, the three Stein children—who all live outside Los Angeles—biannually rotate roles that include oversight for grantmaking, investments, and serving on the board of their family's **Tikun Olam Foundation** (which also includes Mindy and Gene and four representatives of the Jewish Community Foundation).



Mindy and Gene Stein.

FROM THE DESK OF MARVIN I. SCHOTLAND

PRESIDENT & CEO, JEWISH COMMUNITY FOUNDATION

"We have immense gratitude...and a responsibility to make the world better for others."

Those heartfelt words, from our cover story, are **Mindy Stein's**, a longtime Foundation donor. They fittingly capture two of the reasons behind her and her husband **Gene's** philanthropy through their **Tikun Olam Foundation**, the family support



organization they established at the Jewish Community Foundation in 2001.

The Tikun Olam Foundation's mission—focused on lifting up vulnerable young children and their families—is inspirational. By carefully listening and gathering information, the Steins support creative solutions and approaches to problem solving, which are making a demonstrable impact in their area of focus, early childhood development.

As you will read, the initiatives and institutions that have been recipients of Stein family philanthropy are game changers in public education, infant mental health, and parenting-skills development.

Mindy and Gene are equally gracious in their praise for our role in helping nurture and guide their charitable giving passions. Our **Center for Designed Philanthropy** team applies 360-degree perspective to advising donors on a range of philanthropic

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"I have always admired the forward-thinking manner in which Mindy and Gene involved their children in the family's philanthropy from the outset," said **Marvin Schotland**, the Jewish Community Foundation's president and CEO. He has worked with the Steins since they established their original Donor Advised Fund at The Foundation in 1991.

A Focus on Early Childhood Development

The Steins' charitable mission is to assist vulnerable children by providing support to the child, the family, and the community, including educating and nurturing these children so they can become responsible, successful, and caring individuals. Since creating the **Tikun Olam Foundation** (meaning "healing the world") in 2001, their mission has become more focused, and today, they concentrate the Tikun Olam Foundation's grantmaking—which Mindy and Gene call "investments"—mainly in three areas of early childhood development: public education, infant mental health, and parenting skills to promote positive early learning experiences and encourage the development of strong families.

The Steins take a methodical approach. That includes an immersive information-gathering process, in-depth discussions, and fact finding with many childhood development leaders.

Both Mindy and Gene credit the Jewish Community Foundation and its **Center for Designed Philanthropy** for their role in recommending and vetting prospective organizations along with arranging site visits to prospective grant recipients.



Jewish Family Service's New Moms Connect program provides new mothers who are experiencing postpartum depression with supportive services.

"The education we receive through these visits has been invaluable," said Mindy. "We tap the agencies' knowledge and experience to crystallize our focus and enhance our philanthropy."

Game-Changing Funding for Early Childhood Causes

The Steins initially began with modest grants for early childhood development, including for capacity-building functions such as technology and board development.

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Cutting Edge Grants total \$2.3 million! (see pp. 4–5)

Tikun Olam Foundation of the

JEWISH COMMUNITY FOUNDATION OF LOS ANGELES



The Stein family works together closely to support early childhood development. (L-R) Back row: Andrew Stein, George O'Brien, Gene Stein holding Georgia O'Brien, Adam Elga. Front row: Lindsey Morel, Julie O'Brien holding Isabel O'Brien, Mindy Stein holding Charlotte Elga, Shana Elga holding David Elga. Not pictured: Baby Samuel Elga.

(The Tikun Olam Foundation, continued from cover)

As their passion and knowledge grew, eventually they made an all-in commitment to early childhood development, with game-changing funding for initiatives linked to the Steins' specific areas of interest.

One of those grants was a collaborative multiyear award to **KPCC**, a local National Public Radio station, to hire a correspondent, **Deepa Fernandes**, who exclusively covers the early childhood development beat—a rarity in newsrooms today—and a position that could not have been created without the Tikun Olam Foundation's support. As a result, over 120 broadcast and digital reports have been produced on early childhood education and development.

"Issue awareness and public education are key to achieving better outcomes in early childhood development," said Gene. "Because KPCC covers many important societal issues, we thought it could do the same for early childhood development if it had the needed resource—a reporter dedicated to covering this specific area."

Mindy and Gene speak with pride about a program at **Children's Hospital Los Angeles (CHLA)** that teaches and disseminates infant-family mental health best practices. A five-year \$1 million grant last year created the **Stein Tikun Olam Infant-Family Mental Health Initiative**. It trains medical professionals to integrate infant-family mental health principles

into daily clinical care and supports new programs and services for children from birth to age five and for their parents.

In its first year, the program had an immediate effect, training more than 700 professionals—triple the program's goal—and expanding mental health treatment to young children and their families. More than 300 families have been served, with childhood psychologists coaching many parents on infant mental health principles and also developing a model to screen parents for stress and depression, providing assistance when needed.

"Thanks to the Steins' transformative gift, Children's Hospital LA has been able to launch a bold new initiative, infusing best practices in infant-family mental health into the medical care of our most vulnerable families," said **Dr. Marian E. Williams**, associate professor of Clinical Pediatrics at CHLA.

Earlier this year, the Tikun Olam Foundation and the **Doris Duke Charitable Foundation**, a leading national philanthropy supporting children's well-being, made a \$2 million collaborative gift to the **Magnolia Community Initiative (MCI)**. MCI is a groundbreaking collaborative of organizations and community residents working to improve the well-being and quality of life for 35,000 LA children.

Children's Bureau & Magnolia Community Initiative

Improving the well-being and quality of life for

35,000
LA children



Children's Bureau provides vulnerable children—especially in the early years—the skills and foundation necessary to become caring and productive adults.

Mindy is past board chair of **Children's Bureau of Southern California**, a respected child-abuse prevention agency that is a lead provider of resource services for MCI. She says MCI arose out of recognition that support and service systems were failing at-risk children and families. MCI focuses on a 500-block area in central Los Angeles with more than 70 public and private organizations joining forces with parents to help thousands of children and families develop resiliency.



National Public Radio Station KPCC

120+
broadcasts &
digital reports

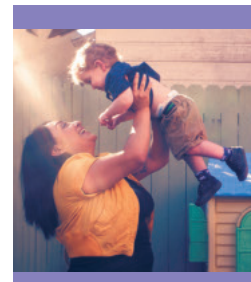
from a reporter hired exclusively to cover the early childhood education and development beat.

Deepa Fernandes reports exclusively about early childhood development issues for NPR's local station KPCC—a position created by the Steins to raise awareness about this topic.

According to **Alex Morales**, president and CEO of Children’s Bureau, “Mindy and Gene provide much more than financial support for Children’s Bureau and MCI. They promote our mission and bring new opportunities to help us prevent child abuse and neglect and strengthen families. They spend the time to understand our programs, get to know our staff, and take a long-term approach to their philanthropic investments.”

In the Jewish community, the Steins have directed significant support to **Jewish Family Service (JFS)**, most recently for the **New Moms Connect program**, which provides care and resources to new mothers experiencing symptoms of perinatal and postpartum mood disorders.

“The Steins’ generosity and leadership have allowed JFS to provide new mothers undergoing difficult postpartum transitions to come together in a warm and therapeutic environment,” said **Paul S. Castro**, president and CEO. “Our program has affected countless families, and without the Steins, this would not have been possible.”



Jewish Family Service

New Moms Connect Program

provides care and resources to new mothers experiencing symptoms of perinatal and postpartum mood disorders.

About The Steins

Gene and Mindy Stein met in Washington, D.C., in the early 1970s. After graduating from UCLA with an engineering degree, Gene served as a commissioned officer in the **US Public Health Service**. Mindy, raised in San Antonio, Texas, relocated to D.C. after graduating from the University of Texas at Austin.

After earning his MBA at Harvard Business School, Gene joined Capital Group, where he spent his entire 43-year career. Mindy, after receiving a master’s degree from Hunter College of the City University in New York, worked as a speech pathologist in the

LA Unified School District and Children’s Hospital LA.

Both speak admirably about how their parents and grandparents shaped their values. “All eight of our grandparents were European immigrants,” noted Gene, who while growing up in West LA watched his parents actively serve at **Temple Beth Am** and support **Hadassah** and the **Jewish National Fund**. Mindy added, “I grew up in a family of modest means, but we always had a *tzedakah* box in our house, and it was important that we were part of our community.”

Mindy and Gene have served their community with distinction, with Mindy working tirelessly as a past leader at Children’s Bureau, the **La Canada Schools** and **Flintridge Preparatory School**. For his part, Gene currently serves as a trustee of **Pitzer College** and is a member of the board of the **LA Opera**. Both serve on the board of the nonprofit **ZERO TO THREE**, which works to ensure the well-being and positive development of infants and toddlers.

A Focus on Family and Philanthropy

It is clear that family—as well as philanthropy—is the focus of their lives. Their oldest daughter, **Shana**, a psychiatrist in Princeton, NJ, and her husband, **Adam Elga**, are parents to **Charlotte, David, and Samuel. Julie**, their second born, is a pediatrician at **UCSF Children’s Hospital**. She is married to **George O’Brien**; they live in San Mateo, where they are raising daughters **Georgia** and **Isabel. Andrew** holds two degrees in engineering plus an MBA and works at **LinkedIn** in the San Francisco Bay Area.

Looking ahead, Gene and Mindy say the Tikun Olam Foundation will focus on four goals: remaining open to new ideas, seeking out meaningful programs where they can make a difference, identifying and funding at least one new organization per year, and making more multiyear grants.

“With the Jewish Community Foundation’s guidance and support, our family’s philanthropy has become much more strategic,” said Mindy. “We have immense gratitude for our good fortune and are blessed with the resources to do our part to improve society. For us it is a responsibility and a privilege to express our gratitude by making the world better for other people.” ✕

“With The Foundation’s guidance and support, our family’s philanthropy has become much more strategic.”

— Mindy Stein

Children’s Hospital Los Angeles

Stein Tikun Olam Infant-Family Mental Health Initiative

700+ medical professionals trained

300+ families served



The Stein Tikun Olam Infant-Family Mental Health Initiative at CHLA is training medical professionals to integrate infant-family mental health principles into daily clinical care and providing mental health services to young children and their families.

“Asking the Right Questions...”

Recently retired as vice chairman and director of **Capital Strategy Research**, a unit of the global investment management firm Capital Group Companies, Gene spent his career studying data and information to shape decision-making. He applies a similar approach to his philanthropy. “It comes down to asking the right questions and developing relationships with the people who have the knowledge,” he said. “But some part of every investment is judgment because you can never have perfect knowledge,” he added.

“We carefully observe the attributes and styles of the leaders, their longevity and stability,” Stein noted. Leadership is one of five hallmarks they seek in organizations, an attribute they value in the Jewish Community Foundation, where Gene serves on its **Board of Trustees** and as a member of the **Investment Committee**, and Mindy is a member of the **General Community Grants Committee** and has been an expert panelist at events. “Over our 25-year relationship with The Foundation, Marvin Schotland has been the CEO the entire time, and senior staff members with whom we interact are also long tenured. That longevity has been important to us,” said Gene.

ANNOUNCING OUR 2016 CUTTING EDGE GRANTS

Improving Our Community with 12 Awards Totaling a Record \$2.3 Million

The Foundation is proud to announce a record-breaking \$2.3 million in Cutting Edge Grant funding—a 24% increase from last year—for 12 innovative programs working to transform the LA Jewish community.

The latest grant awards include programs that range from engaging Jewish millennials through performing arts, to fostering intergenerational relationships and greater involvement within the Jewish community for Jews of all ages, to ensuring quality and continuity in senior health care and much more. We look forward to watching these programs strengthen the LA Jewish community.



The Foundation’s 2016 Cutting Edge Grant recipients represent 12 innovative programs working to transform the LA Jewish community.

Photo: Gary Leonard for HP Photography

Congratulations to our newest Cutting Edge Grant recipients!



Aleph Institute

for Project Tikvah
\$250,000

To provide intervention, support services, and alternative sentencing opportunities to Jewish youth at risk of incarceration.



Honeymoon Israel

for Honeymoon Israel Los Angeles
\$200,000

To engage young couples who are interfaith, LGBTQ, or not currently involved in Jewish life in programming fostering their connection to Judaism.

Builders of Jewish Education

for Project EnAble
\$200,000

To provide a centralized resource that offers reduced-cost clinical support for students with mild to moderate learning needs in Jewish day schools.

Israeli-American Council

for IAC Center Engage
\$200,000

To implement a variety of grassroots programming at IAC’s new Israeli-American Community Center in Woodland Hills.

Since the inception of the Cutting Edge Grants in 2006, The Foundation has awarded over \$15 million to 84 programs designed to reimagine and reshape our LA Jewish community.

Jerusalem U

for Step Up for Israel
\$200,000

To support a film-based Israel education program for students and the community to develop stronger connections with Israel and their Jewish heritage.



Moving Traditions

for Moving Traditions' B'nai Mitzvah Program
\$200,000

To pilot a program that complements b'nai mitzvah training for sixth and seventh graders and their parents, and explores what it means to become a Jewish adult.



The Jewish Federation

for AcrossGen
\$200,000

To engage Jewish senior citizens with young adults, families with young children, and Baby Boomers in the Venice/Santa Monica area through intergenerational programming.

Pico Union Project

for The Sanctuary@Pico Union
\$200,000

To build a vibrant alternative Jewish community in downtown L.A. that offers programs related to spiritual discovery, self-exploration, music, arts, and social justice.



Jewish Women's Theatre

for The Braid 2.0 – PlayC: A Place to Cultivate Next Generation Jewish Voices
\$150,000

To create an artistic platform that connects millennials with their Judaism as they create original theatrical pieces using a Jewish lens.

Reboot in partnership with IKAR

for Death Over Dinner: Jewish Edition
\$150,000

To engage thousands of Jews, primarily in their 20s through 40s, in dinner table conversations about death, relationships, and end-of-life questions.



Los Angeles Jewish Home

for Connections to Care: Interoperability Platform
\$250,000

To improve the health and well-being of Jewish seniors by providing continuity of care to help them live independently.



Union of Reform Judaism

for 6 Points Sports Academy California
\$100,000

To establish the first Jewish overnight sports camp in Southern California that will integrate sports programming with a Reform Jewish camping experience.

RECENT EVENTS

Smart Tools and Insights for Philanthropists



Among the attendees at the June event for private family foundations were Max Factor III and E. Jane Arnault-Factor; Foundation Chair Larry Rauch; Foundation President and CEO Marvin Schotland; Sonia and James Cummings; Alexandra Shabtai; Elana Wien, Director of the Center for Designed Philanthropy.



Special thanks to our gracious host, Foundation donor Arthur Greenberg.

The Foundation offers a variety of tools and insights to assist people with their giving. Private family foundations can enjoy numerous benefits when partnering with The Foundation. These include streamlining the grantmaking process, facilitating family meetings, and providing educational opportunities.

Former Foundation trustee **Max Factor III**, a third-generation descendent of **Max Factor**, the famed Hollywood cosmetics legend, recently addressed a Jewish Community Foundation audience consisting of people with private family foundations. He discussed

the **Max Factor Family Foundation** and shared his family's experiences, especially about their close grantmaking partnership with The Foundation's Center for Designed Philanthropy.

The event was held at the **Arthur Greenberg** home, an award-winning home designed by internationally acclaimed architect **Ricardo Legorreta**.



(L-R) Foundation Chair Larry Rauch with Helgard and Irwin Field.



(R) Mindy Freedman.

The 21st Century: A Jewish Vision, One Day at a Time

The Foundation was honored to bring well-known author and educator **Rabbi Joseph Telushkin** to Los Angeles for an enlightening discussion about his popular book, **Rebbe**, on the legacy of **Rabbi Menachem Mendel Schneerson** who led the **Chabad-Lubavitch** movement for many years. Over 225 members of modern Orthodox synagogues in the Beverly Hills and Pico-Robertson areas attended the program at the **Museum of Tolerance's Peltz Theater**. Rabbi Telushkin led a lively discussion about the Rebbe's wisdom including such concepts as: Anything worth doing is worth doing now, how to disagree without being disagreeable, what it means in practical terms to love unconditionally, optimism and the careful choosing of words, and the notion of *hatzlacha b'zman*—how to use time successfully.



More than 225 people attended a special event presented by Rabbi Joseph Telushkin on his book *Rebbe*.

(L-R) Foundation Senior Vice President of Philanthropic Services Dan Rothblatt; Foundation Vice President of Development Baruch Littman; Foundation Trustee Selwyn Gerber; Rabbi Joseph Telushkin; Foundation Trustee Lisa Korbato.



DONOR PROFILE

The Berlfein Sisters—Davia, Jan, Eliana, and Judy

In the 1950s, the **Berlfein sisters**—**Davia, Jan, Eliana,** and **Judy**—were each given a weekly allowance of 30 cents. **Harold** and **Jean Berlfein** would remind their daughters to “save a dime, spend a dime, and donate a dime” to the family’s *zedakah* box.

Sixty years later, the sisters are still giving charity—together via the **Berlfein Family Donor Advised Fund** at The Foundation, established by Hal and Jean in 1980 and passed on to the sisters in 2014 after their parents’ death. Agreeing on how to distribute the donations among four individuals can be challenging, so they found a creative solution. Half of the funds were allocated to a joint fund, with the remainder divided into four Donor Advised Funds. This provides the flexibility for each sister to make her charitable giving decisions while enabling them to support a cause together. “As sisters, we have some common charitable interests and some different ones,” explained Judy Berlfein.

Over 80 years of giving

The Berlfein sisters are building on a long tradition of philanthropy. Their maternal grandfather, **Dr. Oscar Reiss**, was head of pediatrics at **Cedars of Lebanon** (now **Cedars-Sinai Medical Center**), and supported numerous children’s charities in addition to being a founder of **Jewish Big Brothers of Los Angeles**.

After his passing, Oscar’s wife, **Edna**, fulfilled his dream of opening a clinic for emotionally challenged children, the **Oscar Reiss Child Guidance Clinic**. It was later renamed the **Reiss-Davis Child Study Center** and is now an agency within **Vista Del Mar**.

“Our parents were very involved in founding and growing Reiss-Davis,” says Judy of their mother, Jean, a longtime photographer who was involved with children’s education, and of their father, Harold, a CPA and business manager with clients that included Gene Kelly and Fleetwood Mac.

Harold and Jean also supported “all things Israel.” In addition, the family contributed to **The Jewish Federation, United Jewish Fund, the Endowment for Middle East Truth** and others, including **United Way**.

Family first

Harold and Jean’s primary focus was on raising their daughters and ensuring the siblings remained close. Says Jan Berlfein Burns, “When we were in college, they would pay for long distance phone calls so we could stay in touch with each other.”

“Our parents established the family’s Donor Advised Fund at The Foundation to encourage us to contribute to our community and for us to have a reason to spend time working together,” explained Davia Rivka. “We feel privileged to give from the family fund in their honor and support the things that they cared about.”

A wide range of grantees

The family used the Berlfein Family Fund to support Harold’s



Sisters Davia (1), Jan (2), Eliana (3) and Judy (4)—pictured here in 2012 with their children, spouses and their parents, Jean and Hal Berlfein, both of blessed memory (front row center, seated)—are carrying forth a long-standing tradition of family philanthropy.

alma mater, **Baruch College**, where he had earlier endowed an annual literary prize.

The Berlfein parents were known for their many cycling trips throughout the US and abroad and many ski trips. “As a family, we biked through the Pennsylvania Dutch countryside before bike touring was commonplace,” says Eliana Berlfein.

To honor these passions, the sisters have made grants to **Rails to Trails**, an organization that preserves abandoned rail lines and converts them into bike paths and cross-country ski trails, as well as **Friends of Alta**, dedicated to land conservation in Alta, Utah, where the Berlfein family spent winter vacations and where Harold skied well into his 80s.

The sisters are continuing their parents’ legacy of giving. Both Davia and Eliana volunteer for and donate to the **Citizens Climate Lobby**. Judy contributes to the Institute for **Transportation Development Policy, Rails to Trails, Tree People**, and **Women Against Gun Violence**. Jan supports **Tour de Summer Camp**, the annual Jewish Federation fund-raiser and bike ride to support Jewish summer camp scholarships.

Jan also supports the **USC Shoah Foundation Institute** and the **US Holocaust Memorial Museum**. Eliana has made gifts to a homeless shelter and to an entrepreneurial program for elementary school girls, both in Colorado.

Getting to know The Foundation

The Berlfein sisters became more intimately involved with the family’s philanthropy after their parents passed away—Jean in 2013 and Harold in 2014. “We talked with our parents about philanthropy, but it became real when we had to take it on ourselves,” says Davia.

As for the advantages of a Donor Advised Fund, says Jan, “It’s so convenient, and we’re so lucky to be able to donate to causes we care about.”

The Berlfein sisters also appreciate the expertise The Foundation provides and the feeling of being part of a broader family of Foundation donors who are working to better the community. “I enjoy learning what other families are doing with their philanthropy. It makes me proud to be Jewish,” says Eliana.

The Berlfein sisters want to bring the next generation into this tradition. In the future, our kids will get more involved,” said Davia. “Our parents would have been delighted by that!” ✧



Married in 1948, Jean and Harold Berlfein shared a love of family and the outdoors and the value of giving back to the community.

IN THIS
ISSUE

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Minimizing Our Carbon Footprint

As part of our dedication to *Tikun Olam*—Repairing the World—The Foundation is taking steps to reduce our carbon footprint.

Planting trees in Israel

The Foundation recently planted several orchards in Israel through the Jewish National Fund to help offset our paper and energy usage this past year. We encourage others to do likewise!



Go paperless campaign

Using our Donor Services Online system reduces the usage of paper forms to make grants. We strive to make our online system even more convenient and user-friendly. Additionally, we encourage all donors to transition to online statements vs. mailed paper statements.



Eco-friendly printing

We regularly use recycled paper and soy-based inks for our print materials. For example, this *Legacy* newsletter is printed on paper that contains 30% PCW (Post-Consumer Waste).



THE FOUNDATION'S Legacy NEWS

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resources and tools, from grant recommendations to intergenerational engagement.

The Steins are not alone in citing gratitude as a reason behind giving. This is a commonly expressed refrain among our donors.

That sense of obligation to repair the world and responsibility to nurture others resonates deeply with The Foundation and our donors, like the **Berlfein sisters**, featured on p. 7. For over 80 years, their family has been giving back to the community, fulfilling their charitable passions while bonding more closely as a family.

Elsewhere in this issue, you will read about the recipients of our Foundation's 2016 Cutting Edge Grants. This year, 12 new initiatives received awards totaling a record \$2.3 million, a 24% increase from 2015.

The innovators who have conceived these groundbreaking programs shaping the future of Jewish L.A. are driven by a similar sense of obligation and responsibility. Their programs will engage Jewish millennials, create more interconnected communities, and ensure continuity of medical care for our elderly.

At the hub—the intercept between donors, causes, and institutions—you will find The Foundation. It's the function we proudly serve for our valued communities...with an immense sense of gratitude and responsibility to others. ✕