



CHARLES AND LYNN
SCHUSTERMAN
FAMILY PHILANTHROPIES

POSITIONING PLATFORM

October 2021

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Positioning is a process that helps organizations align around a common set of language and principles to guide how its presents itself externally.

It ensures that:

- We communicate consistently about our work in a way that reinforces our broader mission and goals.
- People outside the organization have a clear, consistent understanding of our work, values and principles.

The Schusterman Family Philanthropies' Positioning Platform creates a common thread that weaves together our work in the U.S. and Israel and across all of our portfolios. It is rooted in our organizational values and cultural principles.

While the Positioning Platform document is an internal-facing resource and should not be shared externally, the positioning language can be used for the following purposes:

- **Discussing Schusterman Publicly:** It can be used to inform how we talk about Schusterman, our mission and our work with outside audiences, including peers, colleagues and grantees.
- **Developing Materials:** It can be used to form the basis of materials, either at the organizational level or for specific portfolios, programs or initiatives.
- **Helping Grantees and Partners Talk About Schusterman:** It gives grantees and other partners easy to use boilerplate to include in their materials or to explain who Schusterman is to their audiences.

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Internal-facing language

Charles and Lynn Schusterman Family Philanthropies works in the United States and Israel to achieve more just and inclusive societies.

In the U.S., we address systemic racial, gender and economic inequities to ensure people have true access to equal resources and opportunities. We are also committed to building a more joyful and inclusive Jewish community that lives out Jewish values, strengthens support for Israel and contributes to a more just world. In Israel, we work toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable.

Guided by our entrepreneurial, innovative spirit, we listen to, invest in and connect leaders and organizations to pursue long-term solutions as we strive for a future in which both the U.S. and Israel live up to and achieve their highest ideals.

See Key Points (page 4) for more on how to use the positioning statement.

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Public-facing boilerplate language about Schusterman Family Philanthropies

Long version (used only on internal-facing materials and on the Schusterman website)

Charles and Lynn Schusterman Family Philanthropies strives for a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies. We work to advance racial, gender and economic equity in the U.S., as well as to foster a more joyful and diverse Jewish community. In Israel, we work toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable. We aim to drive and support long-term systemic change through investments in leaders, organizations and U.S. public policy. www.schusterman.org

Short versions used in the U.S. and Israel

United States (note: In specific contexts, we may replace the last sentence with the portfolio's north star statement as part of this text.)

Charles and Lynn Schusterman Family Philanthropies strives for a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies. Schusterman invests in efforts to advance racial, gender and economic equity in the U.S., as well as to strengthen the Jewish community and Israel. We aim to drive and support long-term systemic change through investments in leaders, organizations and U.S. public policy. www.schusterman.org

Israel

Charles and Lynn Schusterman Family Philanthropies strives for a future in which the United States and Israel live up to their highest ideals and achieve more just and inclusive societies. In Israel, Schusterman Family Philanthropies – Israel works toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable. www.schusterman.org

Tagline

Working in the United States and Israel to achieve more just and inclusive societies.

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We ground our philanthropic vision in our commitment to the pursuit of justice (*tzedek*), repairing the world (*tikkun olam*) and treating all people with civility and humanity (*derekh erez*). Our five core values inform our investments and define how we approach our work.

- **Equity:** We seek to create a society that is more equitable, inclusive and respectful of all people.
- **Impact:** We work toward real change by investing in organizations and leaders able to meaningfully address entrenched challenges and complex problems.
- **Optimism:** We see possibility rather than impossibility in our work.
- **Humility:** We recognize our grantees and partners face incredible challenges every day, and no one has all the answers.
- **Collaboration:** We believe we can go further by working together to generate solutions.

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Public-facing statements for each portfolio that shows its connection to the overall positioning statement.

- Our **Criminal Justice** portfolio seeks to build healthy and safe communities by ending mass criminalization and incarceration, repairing the harm caused by a criminal legal system built on structural racism, and creating new pathways to justice and safety.
- Our **Education** portfolio seeks to build an equitable society in which Black and Latinx students from low-income backgrounds are able to access a high-quality, culturally relevant K12 education that empowers them to achieve social and economic liberation.
- Our **Gender and Reproductive Equity** portfolio seeks to build an equitable world in which all people—particularly Black women, women of color, and transgender and nonbinary people—have access to reproductive health care and knowledge and care, to greater political and economic power and leadership, and to safety in all aspects of their lives.
- Our **Israel** portfolio seeks to strengthen Israel as a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable.
- Our U.S. **Jewish Community** portfolio seeks to strengthen the future of the Jewish community by empowering young people to connect with inclusive Jewish values, deepen their understanding of Israel and contribute to a better world.
- Our **Tulsa** portfolio supports youth and families in Tulsa, OK, who live with the effects of social, racial and economic inequity to gain the agency, knowledge and resources to eliminate systemic barriers and design their own futures.
- Our U.S. **Voting Rights** portfolio supports efforts to enable all citizens of the United States to exercise their constitutional right to vote easily and safely, free from voter suppression, so they can have their voices heard and equitably represented in policymaking.

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Within our Jewish and Israel portfolios, we operate a suite of initiatives designed to cultivate and elevate leaders:

- **REALITY** brings a diverse network of inspiring changemakers on a formative journey to Israel to strengthen their leadership and passion for repairing the world as well as to build their understanding of and connection to Israel.
- **ROI Community** is a global network of rising Jewish leaders who are transforming Jewish life and fostering positive social change in Israel, the U.S. and global Jewry.
- **Schusterman Fellowship** is building a robust, diverse talent pipeline of exceptional Jewish leaders who are driving change in their organizations, the Jewish community and beyond.

KEY POINTS

These are topline, public-facing messages that staff can refer to when describing our work.

Our Work and Approach

- Schusterman Family Philanthropies invests in long-term systemic change in the United States and Israel. We strive for a future in which both countries live up to their highest ideals and achieve more just and inclusive societies.
- In the U.S., we invest in efforts to address systemic racial, gender and economic inequities through our work in Criminal Justice, Education, Gender and Reproductive Equity, Voting Rights and in the Schusterman family’s hometown of Tulsa, OK.
- We are also committed to building a joyful Jewish community that lives out Jewish values, fosters a sense of belonging amongst diverse Jews, strengthens support for Israel and contributes to a more just world.
- In Israel, we work toward a secure homeland for the Jewish people, a thriving democracy and an inclusive society that cares for its most vulnerable.
- We seek to put our commitment to diversity, equity and inclusion—particularly as it relates to race, gender, sexual orientation, gender identity, socioeconomic status and citizenship status—at the center of our work in the U.S. Within our Jewish, Israel and Tulsa portfolios, we have long invested in efforts to pursue LGBTQ equality and belonging.
- We use grantmaking, program and advocacy strategies to invest in our seven portfolios: Criminal Justice, Education, Gender and Reproductive Equity, Israel, Jewish Community, Voting Rights and support for our founders’ hometown of Tulsa, OK.
- Our grantmaking activities include investments in charitable and educational organizations within our seven portfolios.
- We also operate three programs focused on cultivating leaders as well as their commitment to justice and connection to Israel: REALITY, ROI Community and the Schusterman Fellowship.

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- Our newer advocacy activities in the U.S. are focused on supporting policies, legislation and, at times, elected officials who share our commitment to ensuring people have equitable access to resources and opportunities, as well as to ensuring the strength of the special bipartisan relationship between the U.S. and Israel.
- Our philanthropic approach includes a commitment to ongoing learning, long-term investment, and supporting a range of partners working on long-term solutions in our portfolio areas.
- In 2021, we updated our name to Charles and Lynn Schusterman Family Philanthropies (Charles and Lynn Schusterman Family Philanthropies – Israel in Israel). This change reflects the continued expansion of grantmaking, operating and advocacy activities funded by the Schusterman family.
- In the U.S., Schusterman Family Philanthropies includes the charitable grantmaking and programmatic work of the Charles and Lynn Schusterman Family Foundation, as well as the advocacy activities supported by the Schusterman family.
- In 2020, the Schusterman family gave \$450 million across its charitable and advocacy grantmaking, including over \$150 million to COVID-19 emergency relief efforts, primarily supporting low-income individuals across the U.S. and Israel.

Our History and Evolution

- Charles and Lynn Schusterman began their family foundation in Tulsa, OK, in 1987, focused on strengthening the Jewish people, Israel and their hometown of Tulsa. They co-led the foundation until Charles passed away in 2000. Lynn led and expanded the foundation geographically and programmatically for the next 15 years.
- Their daughter, Stacy, joined her as Co-Chair of the Foundation and became Chair in 2018. She has built upon the family's legacy philanthropy in the Jewish community, Israel and Tulsa, as well as expanded it to include racial, gender and economic equity in the U.S. through investments in K12 education, criminal justice, gender and reproductive equity, and voting rights.
- The family's Jewish values have always been at the core of their philanthropy: a commitment to the pursuit of justice (tzedek), repairing the world (tikkun olam) and treating all people with dignity and respect (derekh erez).

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- *If asked:* The family and its dedicated team of employees built Samson Investment Company for 40 years. They sold most of the family company in 2011 and used a significant part of the proceeds to endow their philanthropy.
- In 2021, we updated our name to Charles and Lynn Schusterman Family Philanthropies (Charles and Lynn Schusterman Family Philanthropies – Israel in Israel). This change reflects the continued expansion of grantmaking, operating and advocacy activities funded by the Schusterman family.
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- In 2020, the Schusterman family gave \$450 million across its charitable and advocacy grantmaking, including over \$150 million to COVID-19 emergency relief efforts, primarily supporting low-income individuals across the U.S. and Israel.

We have additional messaging that provides further detail on how to understand and talk about our work and perspectives. These documents include Schusterman Israel Perspectives, and Standing for Racial Equity + Israel: Our Perspective (forthcoming). You can find them in the Communications Sharepoint folders.

If you need additional messaging support, please reach out to the Communications Team.

GUIDING PRINCIPLES

This section goes a layer deeper than the key points above to provide context for Schusterman's work and worldview.

These principles lay out why we support the work that we do.

We are an organization rooted in Jewish values. This means that Jewish values guide and animate our work, and we are committed to pursuing justice (*tzedek*), repairing the world (*tikkun olam*), and treating all people with dignity and respect (*derech erez*). Our commitment to Jewish values also means a commitment to strengthening the future of the Jewish people and Israel. Core to this work is engaging young people through joyful, meaningful and inclusive Jewish experiences and by cultivating a new generation of diverse and dynamic Jewish leaders.

We are committed to helping both the U.S. and Israel live up to their highest ideals. We recognize that both countries are on a journey of continuous improvement, and we are committed to supporting that growth through our grantmaking and advocacy activities. Our work focuses on helping both countries create more just and inclusive societies.

We are committed to advancing equity. In the U.S., we focus on addressing systemic racial, gender and economic barriers that prevent people and communities from realizing their full potential. Our investments across our Criminal Justice, Education, Gender and Reproductive Equity, and Voting Rights portfolios focus on the many ways individuals and communities experience systemic oppression and discrimination. We have also made significant investments in pursuing LGBTQ equality and belonging in Jewish life and Israel, as well as to advance racial and gender equity within the U.S. Jewish community. In Israel, our DEI work is focused on deepening our understanding of the rich diversity of Israeli society, placing it in its unique historical context, and examining the opportunities and complexities it creates.

We believe in Zionism. We believe in the Jewish people's right to self-determination and a safe, secure state, especially after a long history of persecution, expulsion and threats of annihilation. Our vision of Zionism centers on supporting Israel as a secure Jewish and democratic state rooted in its founding principles of equality and inclusion for all its diverse citizens, including Jews, Arabs, LGBTQ+, secular, religious, Mizrahi, Ethiopian, Ashkenazi and more. We work with many different communities in Israel, recognizing that their well being is inextricably linked. We support efforts to encourage dialogue across sectors, preserve democracy and ensure equal rights for all, and build pathways for people to live together in a shared society. While a negotiated two-state solution may be difficult to achieve in the near term, we support efforts to ensure it remains a viable option so that Israelis and Palestinians can each have a state and live in peace alongside each other and provide better lives for their families.

Additional messaging included in the Schusterman Israel Perspectives, and Standing for Racial Equity + Israel: Our Perspective (forthcoming). You can find them in the Communications Sharepoint folders.

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These principles, developed within the frame of our core values (equity, impact, optimism, collaboration, and humility), lay out how we express these values in the work we do.

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We seek to embed equity in how we approach our work. Equity is both an outcome we seek to advance and also how we strive to approach our work. We want to create an organization and partnerships which embody the diversity of the communities we work with – and we know that having a range of backgrounds and perspectives makes our work stronger and more effective. We are committed to deep learning and continuous improvement in this area, and to reflecting on and adjusting our processes, policies and language to ensure they are as inclusive and equitable as possible.

We seek to maximize impact throughout our work. Complex problems require long-term solutions. We work on systems-level change and believe that effecting that kind of change requires embracing innovation and risk-taking throughout our work. We recognize that no one strategy or tactic will yield the results we are working toward, so we employ multiple pathways, including grantmaking, operating programs and advocacy activities, in pursuit of our goals.

We put a premium on collaboration and partnership across our work. While we are willing to be a leading voice and funder on our priority issues, we prioritize working in close collaboration and partnership with our peer funders, allies and grantees. We also prioritize making connections between leaders and organizations working on similar issues. We approach all our work with humility meaning that we do not think we have all the answers, that we view our partners as the experts and that we are deeply committed to ongoing learning.

We embrace complexity and possibility. We understand that, for many of the issues we work on, there are no quick and easy answers, but we do believe there are meaningful solutions. We believe it is important to create space to grapple with difficult questions, foster dialogue across differences, and ensure that those conversations are always rooted in mutual respect.

We seek to amplify the experience and voices of the communities with which we partner. Instead of prioritizing our own voices or public profile, we strive to uplift the work of our grantees and the perspectives and experiences of those most proximate to the issues on which we work.

AUDIENCES

The audiences listed on this page reflect those we seek to reach, engage and influence through our communications work. There are a broader set of audiences we reach and engage through our grantmaking and program strategies.

PRIMARY AUDIENCES

- **Grantee Professionals:** Staff of our grantee organizations
- **Program Participants:** People engaged through our programs (ROI, REALITY, Fellowship)
- **Funders and Philanthropic Peers:** Those with the resources to give, as well as the professionals who influence them (e.g., peer philanthropies)
- **Field and Policy Professionals:** People who work in and influence our portfolio areas (e.g., policymakers)

SECONDARY AUDIENCES

- **Sector Professionals:** People who work in the broader philanthropic and nonprofit sectors
- **Media:** Reporters who cover our portfolios or work on broader issues or care about issues related to racial and gender equity
- **Applicants and Attendees:** Prospective program applicants. People who attend a one-off event

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This section is for internal use and is intended to guide content and communications. Our voice is grounded in our values and cultural principles. If people were to describe us, we hope they would say we are:

- **Humble.** We don't seek the spotlight, but we are willing to speak out when it matters. When we speak, it comes from a place of purpose, not ego. We use our power as funders to amplify the voices, stories and contributions of others. We don't assume we know everything about the people impacted by our work and strive not to speak for them. We acknowledge when we get it wrong and are always willing to reflect, learn and improve.
- **Driven.** Our drive is fueled by a mix of optimism and realism. We are passionate, positive and solutions-focused even—and especially—in tough situations. We are motivated by our values and focus on building and sharing knowledge that can lead to new ways of achieving better results. We are not afraid to try a new approach to solve a problem or fill a gap.
- **Approachable.** We say what we mean and mean what we say. We use clear, direct language and avoid both jargon and slang. If our language were an attire, it would be "Business Casual." We also strive to be accessible to our grantees as our partners in this work.
- **Caring.** We work on systemic change, and we are in this work because we care about people. We use inclusive language and aim to amplify the experiences and voices of people of diverse backgrounds, faiths, perspectives and orientations. We focus on communities' aspirations and assets, rather than their challenges.
- **Nuanced.** The issues we work on are complex, and we are willing to take complex positions, even ones with which some of our staff and closest partners may disagree. We are driven by our values and believe robust debate is a healthy part of a strong democratic societies and Judaism.
- **Empowering.** Our belief that change is possible is what motivates us. The challenges are great—but so too is the potential for people to work together to meet them. We want to make a difference and build a world that future generations can be proud to inherit. We amplify stories of collaboration and innovation and share learning and insights to help others create positive change.

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Through our communications, we strive to influence others with our ideas. While we are not seeking a prominent public profile, we do want the Schusterman name to be connected to our work related to advancing racial, gender and economic justice, and to strengthening the Jewish community and Israel. We leverage our public profile and presence when it is in service of our overall goals and when we believe it is critical to advancing our work and our values.

We do this by:

- **Reflecting our values of equity, impact, optimism, humility and collaboration.**
This means we reference and use them as key themes as often as possible in our writing and through our storytelling.
- **Emphasizing dignity and respect for the people and communities impacted by our work.**
This means we use people-first language and the terminology that different identity groups use to self-identity/speak about themselves when referring to them.
- **Using our voice to stand for our values and grantees.**
This means we believe in both leadership and allyship. While it is our preference to amplify the voices and stories of our grantees, we are willing to speak out publicly when we believe it is critical to advancing our work.
- **Leading with our grantees, not our dollars.**
This means we prioritize the voices of our grantees and the people who work hard every day to make a difference on the issues we support.
It also means we and our investments are not the headline but may be referenced in a supporting capacity.
- **Announcing investments when we believe it will advance our overall goals.**
Our philosophy on how we talk about how much money we give in general, to specific portfolios and to specific grantees is still evolving. Right now, we make the determination on a case-by-case basis.
- **Having a public-facing narrative that is consistent and has integrity but is not comprehensive.**
This means that we do not think it is necessary to list every single grant on our public-facing website; rather we are committed to listing a representative sample to illustrate the scope of our work.
- **Speaking to a diverse audience.**
This means we see our audiences as diverse in perspectives and backgrounds and in the identities they hold. We are conscious of the role language can play in perpetuating power dynamics, and we seek to avoid, and to challenge when possible, language that leads to perpetuating inequities.

These key words and phrases are core to defining Schusterman Family Philanthropies and our work. For some terms, we have provided definitions to reflect our perspective on them. Other terms are defined through our core values and cultural principles. For the remaining terms, our definitions are in formation.

- **Equity:** Enabling true equal access to resources and opportunities to realize one's full potential

Particular focus on racial, gender and economic equity in the U.S.

Also full LGBTQ equality and belonging

Full potential defined as a society in which a person's outcomes are not pre-determined by their race, gender, sexual orientation, etc.

- **Jewish values:** justice (*tzedek*), repairing the world (*tikkun olam*), and treating people with dignity and respect (*derech eretz*)

- **Zionism**

The Jewish people's movement for self-determination and a safe, secure state

A democratic homeland for the Jewish people in the land of Israel, rooted in the founding values of Israel's Proclamation of Independence, which calls for equal rights for all its citizens

- **Democracy**
- **Inclusion / sense of belonging**
- **Opportunity**
- **Leadership**
- **Complexity**

Willingness to recognize and embrace that issues are multi-faceted and cannot be meaningfully addressed without acknowledging inherent intricacies and tensions

Belief that creating space to grapple with difficult questions and engaging in robust, respectful debate is a healthy part of strong democratic societies

- **Impact**
- **Humility**
- **Innovative/risk-taking/entrepreneurial**
- **Collaboration and partnership**

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