



**75 Years *of* Sharing Resources  
*for* Community Impact**

*The Jay & Rose Phillips Family Foundation of Minnesota | 1944-2019*

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*The Jay & Rose Phillips Family  
Foundation of Minnesota, 1944-2019*

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Jay and Rose Phillips established a philanthropic foundation so their longstanding practice of giving back to the community could continue far into the future. The mission of the Foundation is to honor the legacy of its founders by supporting efforts that address the unmet human and social needs of individuals, families, and communities that have the least access to resources. The Foundation believes individuals and communities most impacted by injustice are the best equipped to generate and lead solutions to that injustice.

Since 2016, The Jay & Rose Phillips Family Foundation of Minnesota invests in the creative and strategic genius of the North Minneapolis community in the spaces of economic development and education. North Minneapolis is a community with a rich set of histories, a wealth of knowledge, a deep commitment to the health of its community, and an eagerness to build suitable and positive change.

For more information about our Foundation,  
please visit [www.phillipsfamilymn.org](http://www.phillipsfamilymn.org)

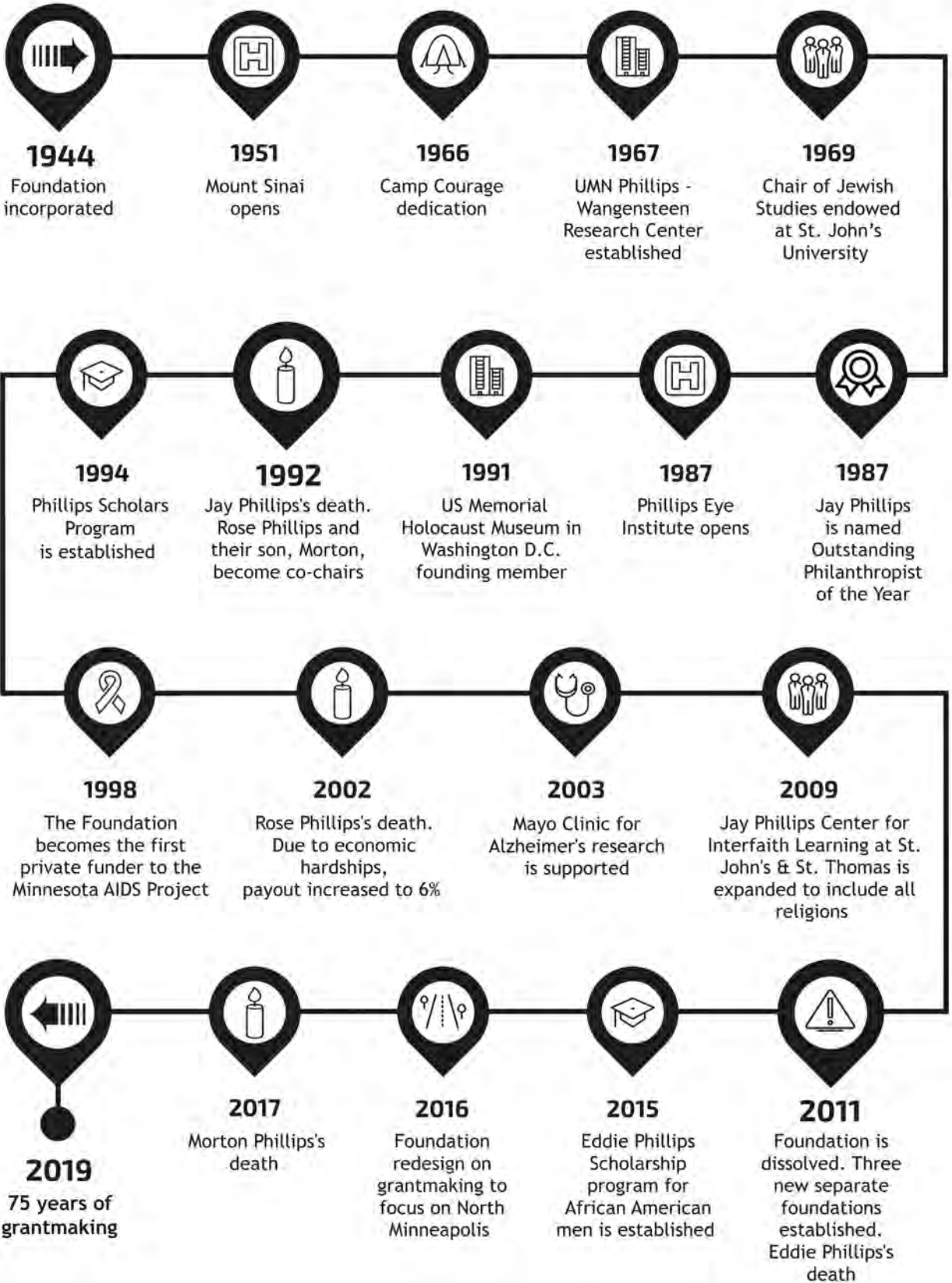
*“I don’t like the word give. I say share, and I think a hairline separates people who make good and people who don’t, and those who make it should help the ones who don’t because we are the custodians of world goods, not the owners.”*

**JAY PHILLIPS,**  
1987, in his speech to the  
Association of Fundraising Professionals  
when he was named Philanthropist of the Year

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# The Jay & Rose Phillips Family Foundation of Minnesota Timeline



# Introduction

The lives of Jay and Rose Phillips were not unlike most Eastern European Jews who immigrated to the United States at the turn of the twentieth century. Their parents arrived with little more than the clothes on their backs and a determination to give their children more than the harsh *shtetels*<sup>1</sup> in Russia from which they came. Both Jay and Rose arrived in the United States when they were just three years old. Jay was raised in Manitowoc, Wisconsin, and Rose grew up on the Northside of Minneapolis. While the families fully integrated into American life, they held fast to their Jewish roots despite living during the intense era of anti-Semitism leading up to World War II and watching the horrific aftermath of the Holocaust from afar.

Jay and Rose married in 1917 and made Minneapolis their home in 1935. Jay and Rose both grew up in the tradition of Jewish giving and volunteerism, and many stories about the ways they prioritized giving have been preserved and passed down through the generations. Jay, for example, remembered giving bread to the poor from his paper route money: “*At age seven I used to give a few pennies to the panhandlers and drifters in Manitowoc and gradually couldn’t resist helping the down-and-outer.*”<sup>2</sup> When they married, Jay and Rose continued their efforts, prioritizing the Jewish tenets of giving not only for the family they raised but through the foundation they established. They gave generously to their beloved Minneapolis community, with a focus on preserving Jewish communities at home and across the country.

For the Phillips family, giving is not just “giving,” but rather listening to community needs and responding. Their philanthropic philosophy was summarized by Jay’s 1980 speech to the Jewish Theological Seminary of America:

*As an adopted and grateful son of this great country—since early boyhood, my life’s ambition has been to make America a better place in which to live, for the hungry, the homeless, the underprivileged and the minorities. Such worldly goods as we are fortunate to accumulate are merely on loan to us throughout our lifetime. Time in its passing will record to what extent I invested my worldly goods in fulfilling my life’s ambitions.*<sup>3</sup>

This Journal narrates four generations of the Phillips family’s philanthropic giving. It marks 75 years (from 1944 to 2019) of Jewish values guiding The Jay & Rose Phillips Family Foundation’s trustees and staff with the sole purpose of making Minnesota a more inclusive and better place to live for everyone who calls it home.

This Journal reflects the Foundation's history of giving and subsequent impact during three different eras: 1) From 1944 to 1992, during which Jay served as President; 2) 1993 to 2011, during which the Foundation became professionalized; and 3) 2011 to the present, during which the Foundation split into three separate family foundations, and The Jay & Rose Phillips Family Foundation of Minnesota was established. While the areas of focus have shifted over the years, the core mission has remained the same: *"to honor the legacy of its founders, Jay and Rose Phillips, by continuing the family tradition of sharing resources for the public good, while exercising leadership and flexibility in responding to emerging community needs."*<sup>4</sup> This flexibility has allowed the Foundation to remain nimble and innovative in its grantmaking for 75 years and counting.



# Anti-Semitism & the Jewish Response

Decades before the prominent journalist, Carey McWilliams, concluded in 1946 that Minneapolis was “the capital of anti-Semitism in the United States,” the city had been practicing policies of employment and housing discrimination coupled with outward hatred toward Jews.<sup>5</sup> By the 1930s, anti-Semitic messages and stereotypes passed from fringe hate groups such as the KKK and the Silver Shirts to mainstream politics. For example, in their efforts to discredit the Farmer-Labour Party which had hired Jews, advisors to Harold Stassen’s 1938 Republican campaign created the infamous cartoon, “*The Three Jehu Drivers*.”<sup>6</sup> It was distributed in pamphlets and displayed on billboards throughout Minnesota, and Stassen won the governorship in 1938. At around this time, ministers began to proclaim anti-Semitic rhetoric in their radio programs and weekly sermons.<sup>7</sup> However, while anti-Semitism and discrimination thrived in Minneapolis throughout the 1920s and 30s, Jewish community leaders were organizing a response.

Jay believed that the community should rally together to fight the injustices of anti-Semitism. In 1944, he and Rose founded what was originally called the Phillips Family Foundation as one community-based response. The Foundation was just one of many organizations working to eliminate discrimination and provide safe places for Jews to socialize and organize.<sup>8</sup> He articulated his idea of community giving by stating:

*I like to think the Phillips Foundation serves a dual role. 1) To lend assistance to worthy projects within its capacity to do so, and 2) if possible, to use these contributions as an incentive to hopefully stimulate others to give generously . . .*

Until Jay’s death in 1992, the four main pillars of the Foundation’s giving were: 1) anti-discrimination, 2) health, 3) higher education, and 4) disability. Generations after Jay and Rose died, their generous and compassionate



THE “THREE JEHU DRIVERS”

Prepared and issued by E. J. Lloyd, 2725 Emerson Ave. S., Minneapolis, Minn., in behalf of better government.

“Three Jehu Drivers” cartoon (courtesy of the Minnesota Historical Society collections).

*“spirit[s] lives inside this Foundation”*<sup>9</sup> and is embedded throughout each of these pillars.

Although the Foundation gave to organizations across the country until Jay’s death, and specifically to the two communities in California and Colorado where his children lived, the focus of this journal is the Foundation’s impact in Minnesota. To complete the journal, records were culled from the Minnesota Historical Society, the Nathan and Theresa Berman Upper Midwest Jewish Archives, and The Jay & Rose Phillips Family Foundation of Minnesota. In addition, 14 oral histories were conducted—of trustees, past executive directors, current staff, and stakeholders—to fill the gaps and record the history of the organization from its founding to the present day. This Journal, which is the culmination of the Foundation’s history, helps to assess the Foundation’s impact and to document the contributions it has made in Minnesota through the lens of its thematic areas of philanthropic focus.

This project was made possible by The Jay & Rose Phillips Family Foundation of Minnesota. Special thanks to all our oral history participants, archivist Kate Dietrick, from the Nathan and Theresa Berman Upper Midwest Jewish Archives, editor Moly Gage, researcher and writer Andrea Klein Bergman, and Patrick Troska, current President, whose leadership and profound knowledge of the Foundation envisioned this initiative from inception to completion. The Jay & Rose Phillips Family Foundation of Minnesota disclaims responsibility for any statements made in the oral histories presented here; they are solely those of the individuals quoted.

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“IF NOT US, WHO ELSE?”<sup>10</sup>

# Areas of Impact: 1944 - 1992

## Philanthropy Is a Family Affair

2019 marks 75 years of impact in Minnesota for what is now known as The Jay & Rose Phillips Family Foundation of Minnesota. To date, the Foundation has given over \$220 million dollars in grantmaking (adjusted for inflation, this is \$430 million dollars in 2019).<sup>11</sup> Jay and Rose prioritized areas of giving in which they had personal experience. For example, they focused on disability issues and were early givers to the Courage Center because their daughter, Helen, contracted polio and became a quadriplegic. Later, they founded the Phillips Eye Institute because their great-grandson, Tyler, had a rare eye-tumor. When close friends and family members suffered, Jay and Rose often turned that pain into action by using the Foundation to find solutions that would benefit their community.

From the beginning, Jay and Rose had a keen ability to confer elements of both entrepreneurship and responsibility onto each generation of Phillips trustees. Consequently, they instilled in their children a strong sense of responsibility and volunteerism to their communities, and this connection to giving was passed down from generation to generation. Although the family units were spread in three locations (Minnesota, Colorado, and California), they were all deeply embedded with Jay and Rose's philanthropy of giving.<sup>12</sup>

Dean Phillips, current Co-Chair of The Jay & Rose Phillips Family Foundation of Minnesota and great-grandson of Jay and Rose, believes that his own philanthropic inspiration was generated by observing his family in action. This began with the family business, Ed Phillips & Sons. In fact, a philanthropic



Jay and Rose with their three children and in-laws. From left to right: William Bernstein (son-in-law), Rose, John Levin (son-in-law), Morton (son), Pauline Phillips (daughter-in-law), Jay, Paula Bernstein (daughter), and in front, Helen (daughter); courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections.

sense was built into the business from the start. Years prior to starting the Foundation, Jay had implemented a profit-sharing and bonus plan for his employees.<sup>13</sup> A pamphlet from the family business states Jay's perspective on giving, which later became the basis of the Foundation:

*Have you ever walked through a home for the aged people? Have you ever seen the look on inmates' faces? Have you ever stopped to talk to them and ask them what they would like most to have? I did many years ago when I was a very young man. I saw on their face's dejection, misery and frustration. They told me that, more than anything else, they wanted to be free, they wanted to be able to live where they wanted to live, eat what they wanted to eat, and wear what they wanted to wear. They wanted more than anything else to spend their own money, not something that was doled out to them, whether by the community or by their relatives. They told me that, without these things, it didn't matter too much whether they were living or dead. There and then, I resolved that I would make every effort to provide, for my own future, financial security. And, beyond that, I resolved that the people who would be associated with me and who helped me realize my ambitions would also be given an opportunity to attain*

*some measure of financial independence in the declining years of their lives, so that when they can no longer be gainfully employed, they would not become a financial burden upon their families and their communities. I wanted them to enjoy their old age, to come and go as they pleased, and to do the things they did not have the time to do when they were younger. I did not want them to be like the people I saw in that home for the aged.*

Of this philosophy, Dean said, “It was baked into our upbringing. It’s what we saw. We had role models, parents and grandparents, that were active philanthropically, particularly Rose and Jay. And, again, this expectation of sharing and expectation of service.”<sup>14</sup> Jay and Rose’s daughter, Paula, also stated that her parents “believed that a philanthropic life was a life of happiness.”<sup>15</sup>

Indeed, when Jay and Rose Phillips created the Phillips Foundation, they had a vision that it would remain a family foundation for generations to come. This was articulated by Jay in 1971 when he changed the name of the Foundation to The Jay & Rose Phillips Family Foundation, stating:

*The Phillips Foundation was created by me as a family foundation in 1944. In the subsequent 42 years, the Foundation grew considerably and during said period made substantial grants to many important and worthwhile public and private causes and became an important factor in the Minnesota charitable community. I feel that is incumbent upon those destined to follow in my footsteps that they do everything possible to maintain the Foundation as long as possible.*<sup>16</sup>

In 1989, three years prior to Jay’s death, he made it known to his family at his 72nd wedding anniversary party, that he still passionately believed in the importance of giving and wanted the Foundation to continue. In his speech he proclaimed:



In 1987, Jay is named “Philanthropist of the Year” by the National Society of Fundraising Executives.

*The reigns of authority will soon be transferred into the strong and capable hands of those who will assume the responsibilities of this heritage and follow in our footsteps. Accepting and discharging the duties and obligations of good citizenship while demonstrating a continuing concern for those less fortunate than they.<sup>17</sup>*

After four generations of philanthropy in Minnesota, Dean expressed how important it is to continue their legacy:

*[T]hey were always focused on the future, and the next generation, and what could be . . . we were taught that success is not to be measured by how much we collect, rather by how much we share. And that's true. And that's what this Foundation is about.<sup>18</sup>*



Four generations of the Phillips' family. From left to right: Tyler Phillips, Dean Phillips, Eddie Phillips, Morton Phillips, and Jay (courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

## Foundational Jewish Values

The trustees and staff do not classify The Jay & Rose Phillips Family Foundation as Jewish, but rather as a foundation with Jewish values. These values guide their relationships with the community and grantmaking. Patrick Troska, the current President and nonfamily staff, states:

*Jewish values are in the DNA of the Foundation. So, it's that interesting tension—we aren't a Jewish Foundation but there is this Jewish influence and ethic that is built into the structure and the existence of it.<sup>19</sup>*

The Foundation's essence of giving centers around three Jewish values of:  
1) *Tzedakah*: giving to the poor is an act of justice and righteousness; 2) *Tikkun*

*Olam*: repairing the world, and 3) *Chesed*—acts of loving kindness. Although these are religious obligations of the Jewish faith, the Foundation’s staff and all three of its executive directors since Jay’s death express their pride in bringing these values forward in the community and continuing to carry forth what Jay and Rose began.<sup>20</sup> The Foundation is unique because of these principles and values. However, the Foundation’s work is also driven by the historic experience of anti-Semitism. Patrick reflects:

*It was easy for the trustees to understand those kinds of issues where discrimination was so prevalent. Being the first private foundation to fund HIV/AIDS in this state at a time when nobody, including government, was touching it. The Foundation’s position to stop funding the Boy Scouts when they were discriminating against gay scout leaders and gay troop members. We were one of the first funders of Equality Minnesota, before it became Project 515, before it became Minnesotans United For All Families to pass marriage equality into law in Minnesota. We were early adopters in a lot of areas because the trustees connected to the pain of discrimination and felt an obligation to step in.*<sup>21</sup>

Although many of the Foundation’s biggest initiatives were not popular among other philanthropic organizations, the Foundation provided funds in response to community request and need. The Foundation’s emphasis on Jewish values and its deep understanding for suffering and discrimination enabled it to sincerely listen to its community and respond with help, often in innovative ways. In fact, the Foundation adopted this spirit of entrepreneurial risk early on, with Jay summing it up back in 1978:

*Permit me to emphasize that foundations—with their funds—have the latitude to do many things that governments cannot do. Foundations can provide funds for experimentation—to try new ideas. Foundations can afford to fail at the programs they support because they are not shackled or inhibited by bureaucratic regulation or accountability.*<sup>22</sup>

## Foundation Focus on Jewish Organizations

Although the Foundation gave to non-Jewish organizations and causes, the main focus of the Foundation under Jay’s tenure was to financially support Jewish organizations and efforts such as the following: Mount Sinai Hospital, the Minneapolis Jewish Federation, Minnesota synagogues, the Minneapolis Jewish Community Center, and Minnesota Jewish educational institutions. Jay sought to not just strengthen these organization and efforts for future generations of Jews, but to thwart and reverse years of anti-Semitism. In 1945,



Jay's speech at the Minneapolis Jewish Federation annual drive asserts the sense of urgency he felt for the Jewish community to rally together:

*We have an obligation to rescue Jewish people. People like you and me. Respectable citizens who have committed no crime other than being a minority, and whom Hitler and his gang chose to pick on. He stopped at nothing. He ravaged and murdered. Threw innocent people into concentration camps. In fact, forced our people to dig their own graves and then buried them alive! Conditions may change, and if they do, you will be expected to contribute in the light of those changed conditions . . . I appeal to you. Give! Give generously! Give from the heart. 700,000 tortured, starved, poverty-stricken, miserable Jews await the result of this meeting.*<sup>23</sup>

Rose, on the other hand, preferred to carry out her giving without recognition. She was active in organizations such as Hadassah,<sup>24</sup> Mount Sinai Women's Auxiliary, and Sholom Home's annual ball and tea fundraisers, faithfully supporting Jewish organizations until her death in 2002.

As their daughter, Paula Bernstein explains, "*Their primary philanthropic involvement was with the Jewish community . . . within which there was a deep culture of philanthropy. That was their way of life. I'll give to yours and you give to mine, and together we'll make Minneapolis a great city.*" They soon became involved with philanthropists from the broader community with the same aims.<sup>25</sup>

## Anti-Discrimination

Jay Phillips Center for Interfaith Learning  
Saint John's University<sup>26</sup>

Jay envisioned combating anti-Semitism through building relationships between Christians and Jews. Consequently, in 1969, the Foundation contributed \$500,000 to establish a chair for a "scholar of Jewish faith" at St. John's University in Collegeville, Minnesota. This revolutionary endowment was "*at a time when relations between the Catholic community and Jewish community were not great in the wake of the Holocaust.*"<sup>27</sup> Dr. John Merkle,<sup>28</sup> the current director at the Jay Phillips Center for Interfaith Learning at St John's University, explains why the endowment was so imperative to the community of Christians and Jews living in Minnesota:

*In the wake of the Holocaust, it became clear that traditional anti-Jewish-Christian teachings had contributed to the anti-Semitism that fueled the Holocaust. Christians have, for centuries, and it's still the case with the majority today, been almost thoroughly ignorant of*

*Judaism. And, worse, they have stereotypes about Jews and about Judaism. [In this] post-Vatican II context in which the hierarchy of the Roman Catholic Church is encouraging joint Catholic-Jewish learning and dialogue. So, what do they do? They decide to establish the country's first chair in Jewish studies at a Catholic university.<sup>29</sup>*

This remarkable union came about because Jay ate daily at the Minneapolis Club, where he became friends with Father Colman Barry, then President of St. John's University. They forged a plan along with attorney Sam Maslon and Jay's son, Morton, to tackle anti-Semitism in such a way as would have an impact on generations of Catholic students.<sup>30</sup> Jay believed this partnership would be a legacy in the Foundation's efforts to combat discrimination. He often gave the following speech to explain the Foundation's support:

*Man's inhumanity to man continues to spread its violence to every corner of this globe. Famine and pestilence still stalk the earth, and no matter how removed they might be from where we live—they still rest on our doorstep! It was my hope—and that of my family—that establishing a Chair in Jewish Studies in a Catholic university might serve to set an example that other major universities and colleges might choose to follow. I sincerely feel that . . . [this] will prove to be one of the most worthwhile activities in which the Phillips Foundation has participated. Advance in science and technological improvements have not solved the problem of human relationships. It would appear that this world needs far greater understanding among all its people—among religions—among races—among political parties—and even between people who live next door to one another.<sup>31</sup>*

### University of St. Thomas

Due to the success experienced at St. John's, similar efforts were undertaken as early as 1983 to secure an endowment at the University of St. Thomas, when Rabbi Max Shapiro and the President of St. Thomas, Msgr. Terrence Murphy, met in Rome. Both Catholic and Jewish leaders in the Twin Cities contributed to the endowment's fundraising effort. By 1985, they established the Center for Jewish-Christian Learning,<sup>32</sup> and Rabbi Max Shapiro served as its director until his retirement in 1996.

### Merger & New Mission of Phillips Centers

Although the Jay Phillips Center<sup>33</sup> at St. John's University merged with St. Thomas' Center for Jewish-Christian Learning in 1996, their mission remained the same: to have open dialogue and create a better understanding between

Christians and Jews in Minnesota. In 2009, when Dr. John Merkle became the director, the mission expanded to include all major religions. With the new name change to the Jay Phillips Center for Interfaith Learning, which operated in both St. Thomas and St. John's, it was able to introduce Christians *"to the grandeur and the beauty of Judaism and to Jews as fellow human beings as well as Muslims as fellow human beings and Hindus and Buddhists and Sikhs."*<sup>34</sup>

This inclusiveness came about because Jay and Rose's grandson, Eddie, and great-grandson, Dean, saw a rise of Islamophobia as well as anti-immigration sentiment, especially after 9/11. Dean reflects on how the Foundation was able to respond and adapt to this hostility and prejudice:

*About a decade ago, I remember recognizing that in many ways the Muslim community was being treated the way the Jewish community had decades before, and that it was a responsibility of ours to broaden the scope of the work. And my dad and I worked hard to do so, to move it from a center for Jewish-Christian learning to multi-faith learning. And that's where it stands today.*<sup>35</sup>

In 2011, Dr. Merkle's recommendation that the Center be divided again was accepted and the endowments were split 50/50. Dr. Hans Gustafson was appointed director of the University of St. Thomas Center and Dr. Merkle remained director at St. John's University. Today, the two centers *"can now address [their] campuses' distinct needs and constituencies in more efficient ways."*<sup>36</sup> Both centers continue to be committed to carrying out their mission of creating opportunities for people to come together as a community, to learn from one another, and to create a space where understanding and friendships between people of different faiths can continue to grow.

## Holocaust Museum, D.C.

Although the idea of a national holocaust museum was conceived in 1978, it took an additional 15 years and \$200 million dollars from private donations to open its doors in Washington D.C on April 22, 1993. Jay not only supported this endeavor, but also encouraged other prominent Jewish leaders across the country to contribute. As a founding member, the Foundation contributed \$1 million toward this mission. Today, the museum remains the country's foremost expert on the Holocaust, provides resources for teachers around the globe, and continues to be a place of education, documentation, and study. Over 40 million people and 10 million school-age students have visited the museum, and it remains free to all.<sup>37</sup>

## Disability

In the fall of 1951, Jay's eldest daughter, Helen, contracted two types of polio, leaving her a quadriplegic and unable to breathe on her own.<sup>38</sup> Jay publicly addressed his family's grief and their simultaneous need to help others in similar situations:

*My daughter was stricken with polio about seven months ago. She is still in the hospital—still in a respirator, an iron lung. I mention this merely to point out that no one invites disaster—it strikes without warning, when you least expect it . . . We can help them—or we can let them suffer—or we can let them die. The verdict rests with all of us.*<sup>39</sup>

This desperation to help led to considerable financial support to institutions such as the Sister Kenny Institute and Courage Center in Golden Valley (formally known as the Minnesota Association of Crippled Children and Adults). Courage Center continues to provide anyone with physical disabilities the tools of empowerment that will help them “reach their full potential in every aspect of life.”<sup>40</sup> With the Foundation's funding, the Courage Center was able to open additional training and rehabilitation centers, a summer camp, and continue their public advocacy work. The Foundation continued to give to the Courage Center and other disability focused projects<sup>41</sup> until the Foundation's split in 2011.

### Project Spotlight: Courage Awards

Inspired by Helen and established in 1964, The Jay and Rose Phillips Courage Awards recognized extraordinary individuals living independently with disabilities and practicing vocations. These awards were given out annually at the Courage Center's Annual Fundraising Gala and included a small cash-prize. Although this recognition program ended in 2010, in its 46 years of existence, over 200 awards were given to inspiring individuals. After earning her master's in social work, Helen continued to work at a suicide prevention hotline until her death in 1985.

## Education & Health

Jay and Rose considered health and education fundamental human rights. Jay frequently said that “a healthy body and an educated mind are the pillars of strength of the people of the future”<sup>42</sup> and the Foundation's legacy of giving attributes to this philosophy. While Mount Sinai is arguably one of its greatest contributions in the area of health and education, the Foundation also contributed to

important institutions such as Sholom Home for the Aged, The Phillips Eye Institute, and the University of Minnesota.

### Mount Sinai Hospital

Leading up to World War II, Jews and African Americans were discriminated against in areas of employment, housing, healthcare, and higher education. When it came to employment, Jews were mostly self-employed out of necessity, not choice. Throughout the 1930s, it was common to see employment advertisements and places of businesses stating, “Gentiles” and “Gentiles Preferred.”<sup>43</sup> It was especially difficult for Jewish patients at hospitals and Jews who wanted to pursue the field of medicine to find residencies in Minnesota hospitals. Until World War II, the University of Minnesota had segregated housing for Jews and African Americans and approved off-campus housing was mostly off-limits.<sup>44</sup>

At the time, official hospital policies<sup>45</sup> were discriminatory, communicating that non-Whites and Jews were unfit to serve as staff and that patients had to be segregated upon admittance. One Minneapolis hospital went on record to state:

*There are few Negroes, Japanese Americans, Chinese or other minority groups in the city of Minneapolis who would be qualified to serve hospitals.*

Another stated:

*Due to the attitudes of the majority group of the medical staff, the general public, and reaction of gentile patients, it has seemed expedient to limit the number of Jewish doctors to about 10% of the total staff.*

To address discrimination in the area of health, a 1944 study for the Minneapolis Federation for Jewish Services concluded that “*the establishment of a Jewish hospital is feasible and desirable.*”<sup>46</sup> In 1945, the Jewish Hospital Association of Minnesota was incorporated and later renamed, “Mount Sinai Hospital Association.” Jay and other Jewish community leaders set out to raise the necessary funds to build a non-sectarian hospital. It took an additional seven years to raise the necessary \$4 million dollars needed to build the 225-bed facility whose mission was to serve and employ people of the “*Upper Midwest of all religions, races, and national origins.*”

Located at 22nd Street and Chicago Avenue in Minneapolis, the first patients were admitted to Mount Sinai Hospital on February 19, 1951; Jay was a

founding member, served as its first president and appointed chairman for life. He believed that Mount Sinai “*is a living, breathing, working institution, which deals with the greatest problems that each of us faces—the problem of life, and the problem of death*”<sup>47</sup> and was proud to have been part of its undertaking.

Over the years, the Foundation gave millions of dollars to support the hospital. In the subsequent three decades, the hospital continued to expand to include the building of the Jay Phillips Research Laboratory, the Phillips Eye Institute, additional patient rooms, cardiology care expansion, radiology and laboratory facilities, and more.

However, by the late 1980s, the hospital was in severe financial trouble, and Jay fought for its survival. In 1986, Jay’s impassioned speech to the board speaks of his urgency:

*Mount Sinai was built and paid for by our Jewish people—and given to the community as a symbol of our concern for the welfare of all—regardless of race, creed, or national origin. Mount Sinai will survive to fulfill its mission. A hospital with a heart and soul. An essential resource that should be accepted as the crown jewel of our accomplishments in the healthcare field. A hospital that should command respect and support of every segment of our Jewish population from all walks of life . . . this story must be told over and over again.*<sup>48</sup>

In 1988 it merged with Metropolitan Medical Center; the hospital was re-named Metropolitan-Mount Sinai. Sadly, this merger could not save the hospital, and it closed in 1991. During its history, Mount Sinai “*affected extraordinary*



Left image: Jay Phillips (right) with Mount Sinai Hospital Founder’s plaque dedication in 1950; Mount Sinai Hospital rendition with unknown artist (courtesy of the Nathan and Theresa Berman Upper Midwest Jewish Archives, University of Minnesota Libraries).

*social change in the [Twin] [C]ities . . . [because] suddenly other hospitals in town afforded staff privileges to Jewish physicians and physicians of color and stopped charging certain community members at the door.”<sup>49</sup> It fulfilled its mission.*

### Phillips Eye Institute

The Phillips Eye Institute was born of necessity when Jay and Rose’s great-grandson, Tyler, was diagnosed with a rare eye tumor and could not get the care he needed. It took the teamwork and dedication of a large group of people committed to eye care excellence for the institute to open in 1987. During the groundbreaking a year prior, Jay laid out his vision for this new institution to serve and contribute to the well-being of the community. Dean participated in this life-changing event and remembers this fondly:

*I was eighteen years-old at the time and it was the first groundbreaking in which I participated. I still have the hard hat from that day along with the indelible memory of how inspiration is converted to action.<sup>50</sup>*

The 30,000 square-foot addition for ophthalmologists as an eye specialty hospital was part of Mount Sinai. It survived the closure of Metropolitan-Mount Sinai Medical Center in 1991, and today it is the second largest eye specialty hospital in the country with a continued mission dedicated to the diagnosis and treatment of eye diseases.

### Sholom Home

Minnesota’s Jewish population has always been small,<sup>51</sup> but today there are synagogues, Jewish schools, Jewish community centers, and places in St. Paul and Minneapolis for seniors to receive care. This was not the case in the early 1900s; while synagogues were being built, elderly Jews did not have homes where they were offered kosher meals or were assisted in living full Jewish lives. With the aging of the first immigrants from the two immigration waves that brought Jews to Minnesota from 1820 to 1880 (with less than 1000 Jews) and 1882 to 1924 (which brought around 20,000 Jews), it became necessary to find solutions for caring for the elderly within a Jewish context.<sup>52</sup> In 1907, the first Jewish Home for the Aged (later renamed Sholom Home) opened and could accommodate eight individuals. While over the years, the Home moved locations and merged; today, it offers a myriad of services, including both short-term rehabilitation, senior apartment homes, assisted living, and hospice services located on three different campuses in Saint Paul and Minneapolis.<sup>53</sup>

The Foundation began supporting Sholom Home in 1952, which allowed for



Jewish Home for the Aged, St. Paul, circa 1925 (courtesy of the Minnesota Historical Society collections).

the Home to expand its services. In 1973, Jay attended the dedication of the Jay and Rose Phillips Center for Memory Care for adults with dementia and memory loss. He explained why Sholom Home was essential to the Jewish community:

*The Home was established 66 years ago today. It was founded in 1907.*

*Who, at the time, could have predicted the changes and growth that would occur in the next six decades? This handful of people [its founders] were committed to the principles of our Judaic philosophy—devotion, respect and responsibility for the aged. The facilities we are dedicating today increase the resident capacity of the Sholom Home to 224. Sholom Home stands as a symbol to our senior citizens that somebody does indeed care about them—that we are prepared and equipped and ready to care for their needs. The noble work performed here at the Home is in the highest tradition of our biblical teaching.<sup>54</sup>*

This support continued for five years after Jay's death, as Sholom Home was listed as one of Jay's 10 favored charities to which \$500,000 was pledged. Today, this institution is available to all Minnesota residents, regardless of religion, and "provides sympathetic, compassionate and loving care for our people."<sup>55</sup>

## Mayo Clinic

The Foundation pledged \$1 million to assist the hospital with a new research facility, which was completed in 1989. That same year, the Phillips family attended the dedication of the Jay & Rose Phillips Hall in the Harold W. Siebens Medical Education Building on October 19th, just three years prior to Jay's death.

In 2002, Morton's wife, Pauline, was diagnosed with Alzheimer's, a disease that affects an estimated 5.8 million Americans. With a \$10 million donation (\$5 million from the Phillips family and the Phillips Foundation and another \$5 million from an anonymous donor), the family once again turned to Mayo to further crucial research.





Mayo Clinic, Rochester (courtesy of Minnesota Historical Society collections).

In its 130-year history, the Mayo Clinic continues to be a pioneer and innovator in medicine and is currently ranked as the number one hospital in the country with over 34,000 physicians, scientists, and staff located in Rochester, Minnesota.

### University of Minnesota

Jay understood that the University of Minnesota is one of Minnesota's greatest assets, and he worked to strengthen its legacy as one of the country's most prestigious public research universities. Notably, beyond the immediate needs of any public university, he was also forward-thinking in helping create a university foundation that could assist it in continuing to be bold, modern, and ambitious.

### University of Minnesota Foundation (UofMF)

In 1963, the UofMF's groundwork was laid out at Jay and Rose's home with then President, O. Meredith Wilson along with other community leaders. Jay was a founder, trustee, and served as vice president.<sup>56</sup> In 1967, a \$1.5 million-dollar gift to UofMF from the Phillips Foundation was matched by the United States Public Health Research program which allowed for necessary funds to build a medical research lab, later named the Phillips-Wangensteen Building.<sup>57</sup>

Today UofMF has over \$1 billion in assets and continues to make grants to scholarships, faculty, research, new facilities, and academic programs on all four campuses of the University of Minnesota.<sup>58</sup>

### Phillips-Wangensteen Building

By the time Dr. Wangensteen, Head of the Department of Surgery at the University of Minnesota, retired in 1979, he was a world-renowned surgeon, researcher, and teacher. Jay, Rose and Dr. Wangensteen first became friends in the mid-1940s over their collective belief that "people should get well and stay well."<sup>59</sup> This friendship was highlighted in a letter Dr. Wangensteen wrote to Jay and Rose upon hearing the research center at the University would be in their names:

*The research center to which you have very graciously linked my name will surely become a helpful instrument in resolving the nature of disease, and while doing so provide abundant opportunity for many gifted*

*sons and daughters of our great land who share your high hopes for the improvement of man's lot. This enterprise, the child of your magnanimous bounty and great soul, will thrive and flourish, I know, far beyond the time you and I are eyewitnesses to its operation and activities.<sup>60</sup>*

The Phillips-Wangensteen Building, located at 516 Delaware Avenue in the Academic Health Sciences complex at the University of Minnesota, was completed and dedicated on June 11, 1979. The Center was built to house research laboratories and facilities that would serve several clinical departments of the College of Medical Sciences. Jay spoke at the dedication, affirming his and Rose's commitment to the University and their deep affection for Dr. Wangenstein:

*Our family business interests, which have afforded us the opportunity to achieve the means by which my good wife and I have been enabled to further our interest in health and education, are not limited to this area, but our primary beneficiary has been this community in which we have spent most of our married life . . . This community and the University of Minnesota given us the opportunity to translate our interest in health and education into the establishment of a research center at one of the leading medical centers of the world.<sup>61</sup>*

## Education

While Jay had only an eighth-grade education, he believed that education was a path toward economic development and security that everyone has a right to access. While the Foundation contributed to organizations such as the United Negro College Fund and Hillel as early as 1952, Jay and Rose, when asked, also quietly gave to people to help fund their education. In 1973, Jay spoke to St. John's University Board of Regents about this critical area of giving:

*Without the tools of a higher education—the opportunity for success in this highly competitive and industrialized world is a difficult one to attain. My deep and abiding interest in all levels of education and in the welfare of our young people is evidenced by the number of scholarship programs and youth movements in effect in several of the business organizations with which I am associated.<sup>62</sup>*

Minnesota Private College Council & Minnesota Private College Fund  
Minnesota's higher education institutions are a direct pipeline for talent that continues to contribute directly to Minnesota's strong economy. In 1948, 14 private Minnesota universities and colleges banded together to form the

Minnesota Private College Council (MPCC) because “*they were stronger working together than they were competing apart.*”<sup>63</sup> In 1951, Minnesota business leaders came together to fundraise for the Minnesota Private College Fund (MPCF). Today, 17 private higher education institutions are part of the Council, and MPCF has given more than \$86 million dollars toward scholarships, books, lab equipment, computers, utilities, etc. to assist students in completing their education.<sup>64</sup>

Although it is unclear why Jay first started to support the Minnesota Private College Fund, the first check from the Foundation was given in 1968, and this relationship continues today.

## Shift to Economic Well-Being

The Foundation is more than just a tool to give back to the community, it is also a leader in philanthropy. In 1983, Jay wrote letters to his children stressing that as philanthropists, they needed to pay particular attention to community needs and how a “*foundation can respond to the unmet human and social needs so prevalent in all parts of our country.*” He was concerned that foundations’ concentrated wealth was going primarily to cultural and arts organizations. He was also concerned that foundations generally continued to support the same service organizations, and in doing so, missed out on vital new community-based groups trying to address needs that went unnoticed and unfunded. His 1983 letters<sup>65</sup> stated:

*Valid criticism that leaves you with much food for thought . . . that the 22,000 private foundations in the USA have assets of \$48 billion dollars. A study of their annual disbursements reveals that 42% of all private foundations’ grants go to ESTABLISHED EDUCATIONAL INSTITUTIONS. 16% go to CULTURAL AND RELIGIOUS ORGANIZATIONS, while only 18.5% is contributed to qualified charities or service agencies . . . I have always believed that we have sufficient flexibility in the administration of the Phillips Foundation to quickly change our philanthropic priorities to respond to the needs of changing times. People helping people is what this is all about! With much love . . . mother and me.*

From this point forward, requests for financial support from organizations such as the Minnesota’s orchestras and other cultural institutions were given a specific response to reflect this shift:

*In order for the Phillips Foundation to fulfill its responsibilities to the unmet human and social needs so prevalent throughout our country,*

*we are required to dramatically curtail the amount we have made readily available in the past to various segments of the Performing Arts.*

Even when the Minneapolis Jewish Federation asked for an increase in financial support, Jay declined this request.<sup>66</sup> Instead, organizations such as the Boys and Girls Club of Minneapolis were supported, and on a much larger scale. In 1986, Jay and Rose attended a benefit for the Boys and Girls Club of Minneapolis where Jay asserted this new focus of giving:

*A situation that finds expression in the thousands of boys and girls that run away from home and the tremendous volume of students dropping out of our educational systems at a very alarming rate and the tragedy of the untold number of school age youngsters committing suicide. The gloomy aspect of some of these remarks is used to emphasize that future role of the Boys & Girls Club of Minneapolis, as well as the magnitude of responsibilities—opportunities and challenges which lie ahead . . . Let us leave with a heritage we can be justifiably proud of. One that might ultimately enable all mankind to live in peace and harmony in a better world . . . Allow me to share with you some philosophy I have endeavored to subscribe to down through the years. Generosity has never impoverished the giver—but has enriched the lives of all who practice it. The test of progress—and the measure of one’s success—is not whether we are able to add more to the abundance we have already acquired, but are we providing enough from this store of good fortune for those around us who have so very little?<sup>67</sup>*

Education continues to be a priority for the Foundation today.

## Areas of Impact: 1992 - 2003

### Professionalism of Foundation

Jay began the Foundation with \$90,000 in assets. When he died on February 26, 1992 at the age of ninety-three years old, the Foundation had accumulated nearly \$90 million<sup>68</sup> and gave away more than \$3 million annually. Jay left behind an enduring legacy for future Phillips' generations. After his death, the next generation of family members worked tirelessly to not just professionalize the Foundation but to make it into the organization of "Jay's dreams." Although there were conditions, "*he left the pathway [of giving] wide open.*"<sup>69</sup> It was this trust and the gratitude it inspired that defined the trustees' new roles. As their daughter Paula stated,

*It was his money, and in all the goodness of his heart, it was dedicated to his philanthropy. But he wasn't thinking of it the way we think of it in modern foundation days. This was his check book. And while he speaks of having a Foundation, he had a Foundation in the essence that had a big fund . . . he wanted to leave a legacy through us and for us.*<sup>70</sup>

In this way, the trustees had a "*commitment of excellence, working mindfully according to the principals*" of the Foundation to "*honor the legacy of Jay and Rose*".<sup>71</sup> The revised Articles of Incorporation laid out Jay's wishes after his death. First, Rose was named co-chair with the assistance of their son and grandson, Morton and Eddie, while each family unit (Minnesota, California,

and Colorado) was equally represented on the board of directors. Second, in the bylaws, Jay established his 10 favored charities, which would receive a total of \$1 million in five annual installments. Third, each family unit in California and Colorado was entitled to direct 15 percent of the Foundation's grants to their home communities. Fourth, the Foundation was required to direct at least one-third of its grants to Jewish organizations. Finally, the remaining 55 percent of grants were to be allocated to Minnesota as directed by the trustees, in the community where Jay and Rose lived.

Immediately after his death, the trustees established committees to oversee each function of the Foundation. Each committee consisted of three trustees, one from each family unit. The core of the Foundation became the grants committee,<sup>72</sup> which was formed to ensure that the integrity of giving would continue in Jay's absence. At that time, the Foundation received hundreds of requests for funding a year, but money was not yet granted in a systematic or a straightforward process. For example, there were no formal guidelines or specifications for funding organizations: Typically, organizations simply sent Jay or Thomas Cook (Jay's longtime friend and executive director of the Foundation)<sup>73</sup> letters of requests. To help better structure the Foundation, the trustees decided that all staff would be hired outside of familial ties. They therefore formed a search committee to find an executive director to assist with making the Foundation more transparent, process-oriented, and professional. A year later, in September of 1993, Pat Cummings was hired with clear direction to create a foundation "that was equal in stature to Jay as an individual philanthropist"<sup>74</sup> and that would "be on the cutting edge . . . supporting innovation."<sup>75</sup> Thomas Cook remained as a trustee and advisor until his death in 1995.

Pat brought an accumulated 15 years of philanthropic experience to the Foundation, and a unique perspective. She recognized that philanthropy is at its best when creativity, risk-taking, and connection to resources are prioritized and built into a foundation's operations. According to Pat:

*[I]t is being able to recognize creative ideas because that influences the kind of grantmaking that you do. There are opportunities that you can take to help shape things. It's not sitting around waiting for the light-bulb to go on, but it's being open to what the opportunities and the possibilities are and to help other people find them.*

One of the first tasks Pat undertook was making the Foundation's grant-making process transparent. This included creating grant guidelines that the community could access, and which helped ensure a more systematic approach to receiving, reviewing, and awarding grants. Pat also wrote ethical grant

guidelines to guide trustees internally. As Paula pointed out, the trustees had to learn how grantmaking worked, and Pat was instrumental in this process:

*[The] Foundation funds were not to be used to buy tables or tickets to charitable events . . . This helped us all move away from the idea of a personal philanthropic fund to the concept of a foundation that is responsible to the public.<sup>76</sup>*

Another key step to professionalizing the Foundation consisted of articulating the Foundation's grantmaking priorities. In 1994, the Foundation trustees and Pat created a new mission statement that illustrated the intersection between Jay and Rose's values with those of the new trustees. The new mission statement, which was launched in 1995, stated:

*By continuing the family tradition of sharing resources for the public good, while exercising leadership and flexibility in responding to emerging community needs.*

Pat asserted that the new mission statement and focus “*wasn't a monumental kind of change; it just clarified and expanded the original guidelines.*”<sup>77</sup> To support the new mission, the interdependent pillars of giving remained the same and included a focus on: economic hardships, disability, discrimination, quality education, and access to quality healthcare. In addition, the Foundation added a new focus on arts as a means to address social issues. It also shifted from privileging support for an organization's operating funds to prioritizing small projects that addressed unmet human and social needs.

In addition to making the Foundation's giving more transparent, Pat also spent a lot of time with the Minnesota Council on Foundations promoting the Foundation's history and current funding priorities. The number of grant requests tripled due to this explicit exposure, as well as an easier access to grant guidelines. The additional work meant that Pat could no longer handle the due diligence needed without additional staff. On October 2, 2000, Patrick Troska was hired as a program officer with the main responsibility to review proposals, meet with potential grantees, and make recommendations to trustees.

From 1993 to 2003, the following areas of focus illustrated some of the Foundation's groundbreaking grantmaking.

## Anti-Discrimination

From its earliest inception, Jay and Rose conceived of the Foundation as a means to foster good relations among people of all races and religions and oppose dis-

crimination. The Foundation funded Jewish-Christian education, the Jewish Community Relations Council of Minnesota (JCRC), and organizations dedicated to fighting racism. In addition, the trustees considered discrimination against the LGBTQ community as “*profoundly wrong*,”<sup>78</sup> and the Foundation was an early ally of the LGBTQ community and led the conversation in Minnesota on improving policies, services, and care. The Foundation was also the first to privately fund HIV/AIDS programs and services in Minnesota. It supported community organizations such as Minnesota AIDS Project, PFLAG, Family Service for LGBTQ programs, Outfront Minnesota, Rainbow Families, Twin Cities Gay Men’s Chorus, and One Voice Mixed Chorus.

In 1993, the trustees made a decision to discontinue funding the Boy Scouts of America and the local Vikings Council due to its policies on homosexuality that discriminated against gay scout leaders and gay Scouts. Although the Foundation had supported the Boy Scouts annually for many years, the trustees, following Jay’s death, could no longer justify this funding. They voiced their concern and outlined the reasons for their opposition in a letter to the then-president of the Vikings Council where they described the Scout’s policies as “*misguided and wrong . . . and injurious to the greater good of Scouting*.” The trustees’ letter concluded:

*We see no reason why homosexual boys and men cannot be excellent Scouts and Scout leaders, trained to serve their communities with dedication and skill. By ensuring this opportunity to all children, Scouting would extend the great good it provides for Minnesota and for the world.*

Throughout the years, the Foundation has never hesitated to take a strong stance against human rights violations based on sexual orientation or gender identity.

## The Arts

Under Pat’s leadership, The Foundation added an additional area of focus for the arts, primarily as a vehicle to tackle social issues. Pat pointed out that “*there was a gap in [the Foundation’s] approach because we were leaving out a whole segment of the community that was trying to address community needs*.” Through this focus, theatres focused on social issues, such as CLIMB Theatre, Center for Hmong Arts and Talent, Jungle Theatre, Mixed Blood Theatre, Penumbra Theatre, Steppingstone Theatre, and Park Square Theatre, gained support. So, too, did educational arts programs at the Minneapolis Institute of Arts, Minnesota Opera Company, Ordway Music Theatre, and the Walker Art Center.



## Disability

The Foundation continued to support programs and initiatives that assisted people with disabilities and the elderly to live as independently as possible. Organizations such as the Courage Center, Helping Paws of Minnesota, the Minneapolis Jewish Federation (for the Roitenberg Family Assisted Living Residence), and the Vietnamese Social Services received funds to expand their elders' programs were consistently funded from 1992 to 2003.

## Economic Well-Being

Economic well-being has always been a focus area for the Foundation. Between 1993 and 2002, 9/11, the subsequent economic downturn, and the shortage of affordable housing in the Twin Cities prompted the Foundation to once again lead in innovative and responsive grantmaking. First and most remarkably, in 2002, the Foundation increased its annual payout to 6 percent for one year. Second, it increased its efforts to fund projects focused on systems change, public policy development, and advocacy. Pat explains:

*[The trustees] were out there alone doing it and . . . they wanted people to follow them. [The new efforts in 2002 were] consistent with their thinking, that the country's in trouble, people are hurting.*

During this period, the Foundation invested in Hope Community, a large organization dedicated to building affordable housing in Minneapolis. Although the Foundation's trustees had supported the Hope Community's youth programs for years with smaller grants, they wanted to have a more impactful change. In 2000, with a \$500,000 grant, the Foundation established the Opportunity Loan Fund, enabling Hope Community to move quickly to purchase properties and cover predevelopment costs for new housing projects. As a result, Hope completed the first 30 of 280 units by 2002. Today, Hope Community continues to be a cornerstone in providing affordable housing, community centers, small businesses, community gardens, and outdoor community spaces in the Phillips Neighborhood (not related to the Foundation).

### Project Spotlight: American Indian Business Development Corporation

In 1993, the Foundation made the first grant to the American Indian Business Development Corporation to assist in revitalizing Franklin Avenue, buying back their land, and opening Native American businesses. Today, the Ancient Trader's Market is the keystone of economic development and home to several American Indian-owned businesses and art galleries.

## Education

From 1992 to 2003, while the Foundation continued to support the Center for Jewish-Christian Learning at both St. Thomas and St. John's, it also made hundreds of grants to other organizations such as the Learning Center for Homeless Families, Minnesota Minority Education Partnership, Minnesota Book and Literary Arts Building, Minneapolis American Indian Center, YMCA, and many more.

### Phillips Scholar Program

In 1994, the trustees wanted greater impact for its grants to the Minnesota Private College Council, so they directed Pat to talk with its President, David Laird. Together, they created the Phillips Scholars Program, a significant, two-year financial-aid scholarship that supports emerging social sector leaders. As juniors and seniors, scholars become leaders in their communities to “*problem-solve, make hard decisions and really develop the skills of their liberal arts education.*”<sup>79</sup> For their capstone project, they must implement a community-based solution to address an unmet need in their community. The success of the pilot program led to its expansion: Six scholars were chosen annually from across the private colleges and universities. In 2019, the number of scholars selected was decreased to five a year.

Although the program has added components, such as more cohort interaction and support, it has not substantively changed over the last 25 years because it was well designed and implemented for maximum community impact. Carolyn Jones, Director of Development for the MPCF explains the program's unique value:

*There's not a lot of opportunities for low-income students to be able to go out and envision something and create it and execute it to better their community . . . Students are living in their community and they understand what those needs are in a different way. They come about it with a different energy and perspective.*

In 2018, to have a more targeted approach to impact, scholars now create a project based on a unified theme for the whole cohort. For the upcoming 2020–21 cohort, for example, the scholars focused on “Addressing the Achievement/Opportunity Gap in Minnesota.” A recent scholar from the 2019–2021 cohort, Pragya Karmacharya, from St. Catherine University, explains her project, “Her Voice”:

*[This project] [a]ims to address one crucial underlying problem with the achievement gap: that students of color, particularly girls of color, are not being heard. Through writing workshops, public speaking practice and mentorship programming, I will empower participants by integrating their academic, social and family life. My project aims to lead young women to success by validating them for their experiences, giving value to their voice and helping them find courage in their stories.*

The Phillips Scholars Program continues to be a priority for the Foundation. As of the 2019–2021 cohort, there have been over 140 Phillips Scholars. Organizations continue to adopt the initiatives scholars have developed and implemented in Minnesota communities.



2015 Phillips' Scholars Cohorts with staff Patrick Troska (upper right), Tracy Lamparty (next to Patrick), Joel Luedtke (far left, second row), Tyler Phillips (upper left) and Dean Phillips (center front); courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections.

## Quality Healthcare

In the past seventy-five years, the Foundation has supported organizations to provide quality healthcare for all Minnesotans. This includes significant funding to ensure protection for women's reproductive health. In the 1990s, Minnesota experienced a severe shortage of healthcare professionals who could provide reproductive healthcare services; the Foundation quickly acted to fill this gap by providing the necessary resources so that nurses and doctors could be trained for continued access.

While surrounding states have imposed restrictions on women's reproductive freedom as well as higher costs for contraception, organizations like

Planned Parenthood remain an important point of contact for Midwestern women. Planned Parenthood is the single largest reproductive healthcare provider in Minnesota and continues to provide comprehensive sex education for parents, teens, and families. Early on, the Foundation has proudly funded this organization, and that support continues today. Other organizations receiving support include Greater Minneapolis Crisis Nursery, Lao Family Community of Minnesota, Minnesota AIDS Project, Pro-Choice Resources (now Our Justice), Rural AIDS Action Network, West Side Community Health Center, and many more.

## A Second Round of Transitions

On October 5, 2002, Rose passed away at the age of 103. Her children describe her as *“gracious, warm, welcoming and generous for all of her life, without ever seeking recognition. In times of trouble, her ironic perspective could make us laugh through our tears. It was often through wit that Rose conveyed the humility that framed her view of life.”*<sup>80</sup> Her compassion and values continue to guide the trustees and staff while her spirit lives on through the Foundation.

In 2003, after 10 years of fulfilling her directive from the trustees, Pat retired. Her leadership was instrumental in the rapid development of the Foundation. By the time she retired, the Foundation’s assets were close to \$200 million, and it gave away roughly \$9 million a year in grantmaking. The Foundation had become one of the major philanthropic foundations in Minnesota. The trustees aptly captured her tenure:

*Pat exemplified the very best in principled, thoughtful grantmaking. She is deeply loved and respected by those whose lives she touched. We feel privileged to have been the beneficiaries of her sound leadership and look forward to building upon her legacy.*<sup>81</sup>



From left to right: Amy Crawford, Executive Director from 2003 to 2010, and Pat Cummings, Executive Director from 1993 to 2003 (courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

## Areas of Impact: 2004-2010

In September of 2003, Amy Crawford was hired as the new executive director. Her directive from the trustees was not just to continue what Pat had started but to think outside the traditional philanthropic box. The trustees expected Amy to “listen, keep [her] ear to the ground, build strong relationships, have heart and courage,” and to bring forward anything worth exploring.<sup>82</sup> Although Amy never met Jay or Rose, she describes how much they influenced the staff and their daily work to fulfill the Foundation’s mission:

*I felt like their spirit and generous legacy was very present in the ethos of the Foundation and guided how we developed relationships with others in the broader community. Their leadership, principles, and compassion and care for people in need always inspired us to do our very best.*

In 2005, Amy hired Dana Jensen as the grants manager. Dana was instrumental in turning the grantmaking application process into a new online platform, which made it more accessible to the public.

By 2006, their workload again became untenable for both Amy and Patrick. In addition to grantmaking, they were also participating in funder networks to not just better understand community issues but to be an effective part of solving collective problems. Amy explains this shift in their greater community involvement:

*We were being called to step it up. As we looked around the funding landscape, there wasn't much flexibility to break new ground. People seemed very siloed in their work. Given our openness to supporting a wide variety of community needs and issues, I feel that we brought a holistic view of how these various issues fit together in developing new solutions and collaborative efforts.*

On average, they were reading and sorting through close to five hundred grant proposals annually. On May 7, 2007, Joel Luedtke was hired as a program officer to help the Foundation be “*more responsive to [the Foundation's] constituents, engage in the collective work around priorities and prepare for strategic planning.*”<sup>83</sup> In 2008, Tracy Lamparty was hired to replace long-time staff member and Office Manager, Arlene Reed, who retired in June of 2008, after 18 years with the Foundation.

## **New Funding Priorities & the Financial Crisis**

Under Amy's tenure, the Foundation tightened its funding priorities from seven areas to four. She felt that “*instead of being a mile wide and an inch deep*” the Foundation should focus on deeper impact. This work proved to be timely. Just as the Foundation began strategic planning work for the future, the Great Recession of 2008 wiped out nearly \$60 million in assets. These new focus areas included doubled-down efforts on helping people achieve economic stability through access to housing and home ownership, quality education, transit, and employment. These new priorities meant that many organizations would no longer be funded by the Foundation. Amy recalls,

*It was a difficult time because behind every one of those organizations represented an important relationship and a deep concern and care for the communities being served, and for their staff members whom we had come to admire, respect and work with.*

The Foundation gave six months' notice to all organizations that no longer fit this new direction and gave them all exit grants. During this time, staff moved from generalists to specialists. Amy focused on education, Patrick on housing and transit, and Joel on employment and workforce development. Major initiatives in these years included the Central Corridor Funders Collaborative, development of Minnesota Early Childhood Funders Network (which later became the MinneMinds Campaign), and the Phillips Sectoral Employment Initiative.

## Foundation Split

In October of 2010, the trustees shared the news with staff that the Foundation would dissolve the originating foundation and split into three new, separate foundations to support the three family branches. Moving forward, the Minnesota Foundation would be significantly smaller, with assets of \$62 million instead of \$176 million, and would be renamed The Jay & Rose Phillips Family Foundation of Minnesota. The smaller budget also meant a reduction of staff. Both Amy and Dana Jensen left the Foundation in December 2010. Amy reflects on her time at the Foundation by saying:

*I came to the Foundation at a time when it was ready for its next stage of organizational development, problem-solving and community engagement. I feel very honored and proud to have served as the executive director for that period of time at the Foundation and work with the trustees and staff to support Jay and Rose's vision and philanthropic legacy and continue to build on that in the best way possible. The trustees were incredibly supportive, and we learned from them every day. I attribute my time here and contributions made as one of my most cherished experiences of my career.*

The split was disappointing for many. At first, Dean lamented that “*the glue that had kept a geographically dispersed family connected for four generations evaporated in an instant.*” His father, Eddie, however, saw this as an opportunity to shape the Foundation into something more “*flexible, fast-moving . . . and innovative.*” Eddie’s leadership helped the Foundation move into an era of proactive grantmaking rather than reactive response. After years of reflection, Dean appreciates the direction the split afforded them, as well. He asserts:

*We are a more proactive, flexible and effective philanthropic enterprise than would have been possible under the former structure. I believe Jay and Rose would be pleased by the transformation.*

The three remaining staff were given new responsibilities. Tracy was named the Grants and Operations Manager, Joel was named Senior Program Officer, and Patrick was named Executive Director effective January 1, 2011.

## Areas of Impact: 2011-Present

### Eddie Phillips Dies

In April of 2011, Eddie died of multiple myeloma. He was a champion, mentor, fundraiser, and leader in the community. He brought his keen entrepreneurship to the Foundation and *“was generous in every way a human being can be, not only with financial support, but with his ideas, wisdom, connections, enthusiasm, trust—and most of all—with his steadfast friendship.”*<sup>84</sup> His optimism and leadership are dearly missed by the Foundation’s staff and trustees.

### Board Values & New Direction

The Foundation shifted dramatically and it *“was a particularly challenging moment in its history, a redefinition of how it will continue to have impact with less money.”*<sup>85</sup> The Minnesota trustees directed the Foundation to spend more time in the community and on proactive grantmaking. Moving forward, the Foundation’s annual giving is now around \$3 million. To disburse this money, the Foundation restructured its grant guidelines: The number of grant proposals was reduced from 150 annually to around 30–40, and funding requests were received by invitation only. While the same areas of focus remained (helping people move out of poverty, helping people achieve economic stability, and helping people access education), the Foundation considered each area more narrowly.

The staff saw the shift as an *“opportunity to reinvent [themselves].”*<sup>86</sup> Removed from the previous environment of endless grant cycles, they had more time to strategize around impact goals. Joel explains:



*Not just making grants but creating connective tissue among our grants and then among our peers in the foundation world. We began to think about how we influence public policy. So, there were a lot of new venues or ways to have impact that emerged starting in 2011.*

The staff, led by Dean and his aunt, Jeanne Phillips, who serve as co-chairs, were also given more flexibility and responsibility in how the grantmaking work was accomplished. This new dynamic allowed all staff members to dig into their work and become more deeply steeped in problem-solving. Patrick described the relationship as having “*shifted to one of that relies on greater trust and accountability and not significant oversight.*”

## Innovative Grantmaking

In 2015, the trustees stated that they believed the Foundation could do more to make an even deeper impact to embrace their entrepreneurial spirit. By engaging in a venture philanthropy approach, the Foundation can now take bigger risks, make larger investments, and have a more meaningful relationship with grantees. They also decided to focus the majority of their grantmaking in North Minneapolis. In October of 2015, Joel attended a conference through the Minnesota Council on Foundations where he had been introduced to the “human-centered design” approach. Joel explains this “*had emerged in the social sector as a new toolkit for solving problems.*” Instead of introducing strategies to a community, the Foundation would become a “*deeply embedded player*” where it would be “*holding open a lot of the decision-making to be figured out with [and by] the community.*”

Throughout 2016, the staff engaged with Northside students, parents, community leaders, and small business owners for deeper discovery and collaboration. Following a series of design sessions in mid-2016, two areas of grantmaking emerged for the Northside: 1) supporting public school change by centering student experience in design and implementation, and 2) supporting a locally owned small business and entrepreneurship ecosystem. Additionally, Foundation staff internally began their own conversations about race, equity, privilege, and how to build cultural competence. Patrick explains this effort:

*It’s really about continuing to center the work around community voice. What does the community identify as critical to develop economic infrastructure, and for education to respond more directly to the needs and experiences of students to make the learning experience more relevant? That’s the question, and that has to come from the community,*

*not from us . . . How do we as white folks who have lived in a certain privileged existence go into that space, have honest conversations, and be contributors rather than abstracters? I think that's been the tradition over generations, that white people go in and abstract information, resources, and amenities out of that community. That's the work of the future for the Foundation. And whatever form it takes that's almost secondary in some respects to the approach, because the approach will reveal the right ideas . . . Continuing to do that in an authentic, very transparent way, is going to be how the work gets done. The work itself will be good because it comes out of that space.*



Joel Luedtke, Tyler Phillips, and Dean Phillips engaged with community members in the human-centered design approach (courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

To accomplish this work, the Foundation no longer adheres to traditional grant cycles or site visits, nor does it receive final reports from organizations within specific timeframes. The Foundation is less concerned about structure and now focuses on building relationships in community, listening to lived experience, and collectively achieving outcomes. This has allowed for a more collective and creative problem-solving approach to community voice and input.

## Education

With a focus on student-centered learning, the Foundation now engages in community work to better understand what makes the education experience for students on the Northside more relevant. Patrick asserts that the “old style of agrarian, industrial, educational systems does not work” because many times you are working with students dealing with trauma, and they cannot be expected to learn with those kinds of stresses. So, the Foundation began to explore

the question of “*how do you center the student when designing the educational experience so it is relevant to them?*”<sup>87</sup>

### Northside Schools

In 2017, the Foundation provided more than \$2 million over three years to support experiential models of education at Olson Middle School and Patrick Henry High School, along with support for organizing by Northside parents throughout the district (including current students and alumni, parents, teachers, principals, and community leaders). In order to make systematic changes in Northside schools, which have historically been disinvested, such resources are necessary. Minneapolis School Board Director, Pam Costain, who has been involved in the planning process states:

*We need a boldness of imagination. We can create a different world, but most of us are mainly trying to ensure that our organizations can stay afloat day-to-day. When a foundation asks you to be imaginative and bold and break the rules, that’s a real invitation to think differently.*<sup>88</sup>

Through these efforts, the Foundation has funded innovative programming and strategic planning for: PYC Arts and Tech High School, Patrick Henry High School, North Community High School’s NSTEM Academy, Franklin Middle School, and Rêve Academy.

### Project Spotlight: Patrick Henry High School

The principal of Patrick Henry, Yusuf Abdullah, saw The Jay & Rose Phillips Family Foundation of Minnesota grant as an opportunity to engage his students “*out of the box and develop new things.*”<sup>89</sup> He wanted to bring project-based learning to North Minneapolis while using social justice “*to provide purpose and a sense of motivation for the students . . . to hook them and move them forward.*” Through the grant, students choose a project they want to work on while engaging in their community in a different way. In addition, Patrick Henry used the grant to work toward developing blended content that works across subjects, like math and social studies. The school also works to build relationships within the community to help create internships for juniors and seniors so they can then learn college and workforce skills needed. The Foundation has given the school not just time necessary for strategic planning, but the resources to be bold and innovative in their educational outcomes.



Students involved in an experiential learning activity (photographer Sarah White; courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

### Eddie Phillips Scholars Program

Black male college students are more likely to drop out of a four-year institution following their freshman year than any other demographic.<sup>90</sup> Concerned that the Phillips Scholars program was not meeting the needs of Black male students nor addressing this concern, Patrick met with the MPCC to explore solutions. The effort started as an “*organic listening and interactive process . . . which was a really good model for community engagement.*”<sup>91</sup> African-American community leaders were invited to a design session to think about the kind of scholarship program that could address the issue, and the Eddie Phillips Scholarship for African American Men was created in 2015. Patrick describes how the Eddie Phillips program was created around a simple question:

*If we were to create a scholarship program for Black men today, what would it look like? The ability to be free and flexible and open about how to do that really, I think, opened the floodgates of ideas and it helped us land where we landed, and I don't think we would have gotten there if we just tried to tweak the existing program to make it work. It was everybody's ideas coming together.*

The program works like this: College campus advisors identify African-American men with high potential who are struggling academically and invite them to enroll in the two-year program. Fifteen men are selected. They then participate in internships, leadership and writing courses, attend a national

African-American leadership conference, and network with local African-American leaders. Most importantly, they are connected to a mentor, Dr. Abdul Omari, who coordinates the program and gives each student a personalized educational journey to success. What makes this program so unique and successful is the cohorts' bond and accountability to one another, while having a safe space to explore their "blackness" and identity as it relates to and is defined by leadership. Patrick explains:

*I think we underestimated the interactive relational aspect of this program . . . We were thinking mechanics . . . without understanding that the connection that they all would have with one another and would have with Dr. Omari that made it work. You could have the Big 12 Conference, you could have a leadership course, but minus the relational interactive connection it doesn't work, or it doesn't work with the intended outcome that we were looking for.*

The program began its first two-year cohort in 2015 with just three students. The first cohort consisted of three African-American men from three different campuses: a theatre and creative writing major (Malick Ceesay), a business management major (Zach Nelson), and a business administration major (David Peterson). All three graduated on time and have great jobs. The program has now grown to 15 students in each two-year cohort.

David Peterson speaks about how the program helped him not just to graduate, but to build a strong network that continues to support his professional development and to build in a crucial element of accountability:

*Equipped with a polished resume [and] heightened interview skills, landing a job . . . was easier than expected. I think one of the biggest things for me was really accountability. We also incorporated accountability partners to check in on each other. Knowing that my actions would impact someone else applied the pressure that I needed at that point in time to really focus in and get things done for school.*



The first three Eddie Scholars' cohort. From left to right: Zach Nelson, Malick Ceesay, and David Peterson (courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).



2017-2019 Eddie Phillips' cohort at a retreat (courtesy of the MPCC).

Malick Ceesay describes the program as key to getting himself out of his comfort zone and seeing himself as a leader:

*I think a huge part of leadership is knowing yourself. Learning about yourself and developing who you are, is being as selfless as you can by being a resource to those around you . . . It's funny, going into it, when I started I was like, "Is this something for me to just learn about myself?" But as I went on, I realized how this was impacting me as a leader.*

Zach Nelson gained confidence through the program that shaped who he is today:

*I think the bigger piece that took me time to realize was . . . the stuff I learned about myself. The confidence piece is something I always speak about whenever this question is asked to me. Ask anyone in this room, I was the last person to ever sit and speak to anyone prior to the program and now today I am doing presentations for VPs, directors, things I do on the daily. So, the meaning is very seen and very felt from me every single day, even after you've been out of the scholarship for a year and half now. So, it did really mean a lot and I'm very lucky and blessed to be able to go through all the process.*

Dr. Todd Lawrence, Associate Professor of English at University of St. Thomas, is a literature and writing coach for the Eddie Phillips Scholars program. He describes how unique and necessary it has been for the students:

*[P]eople need to understand what it means to be a person of color living in the Twin Cities, a person who is under-resourced . . . I think the scholarship program is definitely one of those to help students once they get a foot up somewhere to not fall off the ladder . . . to institute a program like this, which is about academics, about leadership, but also provides a kind of social cohesion for the students and tries to help them figure out how to navigate the landscape that they're in, I think that it's a really good thing.*

To date, the total amount the Foundation has granted the MPCC (which includes the Phillips Scholars program) is over \$3.7 million.

## Entrepreneurship Ecosystem

In 2018, Patrick was promoted to President of the Foundation to better reflect his responsibilities engaging with government officials, business leaders, and community developers. Along with Program Officer E. Coco, he focuses on the Foundation's work in supporting the development of a locally owned economic ecosystem of small businesses, entrepreneurs, and co-ops. The Foundation staff have been engaged in listening and better understanding the issues around local ownership and small businesses, particularly for the African American community on the Northside, where a "community has been disinvested for generations that does not have the amenities that most people look to." The Foundation's biggest initiatives include partnering with Village Financial Cooperative (a Black-led credit union), Nexus Community Partners, developing a Commercial Land Trust, and co-purchasing a building on the Northside with two Black



Northside Minneapolis (photographer Sarah White; courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

small-business owners. This work aims to “weave economic power into communities in such a way that it’s anchored and becomes part of the fabric of community.”<sup>92</sup>

### Nexus Community Partners

Nexus Community Partners is a “community building intermediary that works in partnership with traditional philanthropy, community, government and other partners . . . to build social and cultural capital through authorship, leadership, and ownership.” For Repa Mekha, President and CEO of Nexus, African American communities without economic power will continue to struggle. To solve this problem, Repa began to look at more “cooperative economics as a strategy for expanding wealth in communities.” With Foundation funding, Nexus develops and leads the North Star Black Cooperative Fellowship, Technical Assistant Cohorts (TA), and is a partner for the Volunteer in Service to America (VISTA) program.

While Repa understands the role philanthropy can play in affecting positive outcomes, he has also witnessed how it can become an obstacle to Black communities and how it has historically created an imbalance of power between a grantee and a foundation. He explains the process of working with the Foundation:

*In the kind of work that we’re doing, there are no easy results. You don’t get results by just providing some funding, and in a year expecting something significant out of it. You might be able to measure a couple small shifts, but you don’t see lasting landscape shifting kinds of change . . . And you can’t put pressure on people to pretend they can achieve major change in limited time, only to have them come back later to navigate difficult conversations about limited impact. So, we actually walked out the gate with a three-year plan of working with each other. That was very different . . . That’s how our work together got started . . . The result took time—I mean, it took us three years to accumulate significant change, but the results were powerful . . . It takes the ability to think forward and not in the crisis of the moment. So, I see our relationship only growing and being more strategic as we go forward.*

### C3 Twin Cities VISTA

In 1964, the federal government created the AmeriCorps VISTA program to combat poverty by allowing recent college graduates to contribute across the country, serving communities through education programs. However, this volunteer program makes it difficult for low-income students from participating. In 2011, the Foundation created the C3 Twin Cities VISTA program to utilize



VISTA members and further the Foundation's funding priorities. Through the C3 VISTA program, the Foundation subsidizes participants' income to ensure all young people can contribute to the program. E. Coco, Program Officer at the Foundation, explains the program's significance:

*C3 Twin Cities was an exciting program to build and grow at the Foundation. What was especially powerful was our ability to design something responsive to what we know the members would want. We created a program that sat at the intersection of building careers, committing to broader social justice causes and becoming part of a community of change makers. The three Cs, career, cause and community. We've seen some incredibly talented and passionate people come through the program who are already moving on to positively contribute to our collective efforts toward a more just world.*

The Jay & Rose Phillips Family Foundation of Minnesota's work in this area shifts the power balance of traditional philanthropy and also addresses racist institutions and systems. According to Repa:

*I just think that they are demonstrating what I would call 'engaged philanthropy', in a different kind of way than many other philanthropic institutions that I know of in the Twin Cities. [Phillips' Foundation is] a small giant in that sense. What Phillips is doing in a very slow and methodical way is developing a different set of allies. So, sitting on Broadway brings them into contact with a different set of allies and stakeholders than what traditional philanthropy would bring them into contact with. Investing in ways that are very different from the way philanthropy traditionally invests brings you into contact with promising opportunities and strategies that you wouldn't normally get exposed to. Thinking long-term, and outside of that power base kind of framework brings you into contact with organizations that will walk alongside you, support you, and leverage strength and real power with you. That's why Nexus can be there. They end up with a different power base than most traditional philanthropy has been able to achieve.*

### 927 West Broadway Redevelopment

In 2017, the Foundation made the decision to move its offices to the Northside. Finding no suitable office space, they decided to partner with TRI-Construction and New Rules, two locally owned Black small businesses to develop the 927



The brick building is 927 West Broadway (courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

West Broadway building. They created an LLC and will become co-owners of this city-owned property. The goal over the first 10 years of the project is to sell the Foundation's interest to the other partners in order to keep ownership in local hands. In this way, the Foundation serves as a facilitator of local ownership and wealth building, and not a long-term owner itself. Once the construction is completed in 2021, the Foundation's offices will move into the building. Patrick explains the significance of this venture:

*Moving to the Northside is really important, and how we move to the Northside is even more important. We could rent, or we could buy. But this idea about engaging with partners who are Northside residents, who are from the community themselves, and then figuring out a way for our resources to be used as leverage for their economic development, is really an important, different approach. The building becomes yet one more example of how we act out our values through a process that gets a result that is not about us. It becomes a strategy that has a greater result than just buying property or providing a grant or a loan or whatever it might be. It's about a process and an approach to real community change.*

## New Rules

The mission of New Rules is “*disrupting the narrative, breaking new ground, and pioneering innovation*” through cooperative economics. It offers shared workspaces, event and multi-purpose space, social marketplace for artists, and business and creative services to small businesses and nonprofits. Founder and CEO, Chris Webley, describes his relationship with the Foundation as one of “*mutual mission alignment*” and “*transparency*.” He sees the Foundation's commitment to the community as something that has led to a “*more heartfelt relationship*.”

Chris sees the partnership between New Rules and the Foundation as a first important step. While 927 West Broadway will serve the Foundation, the larger space also allows New Rules to scale up their services and programs, so they can assist others to do the same. He asserts:

*[A]part of our motto is sort of that cross-sector collaboration because our culture has been so extractive and just because of the lack of*

*wealth accumulation in our communities, it's going to take a lot of funds. I see the Phillips Foundation hopefully playing a more vital role in modeling those new behaviors of taking risks on small businesses because actually we know that small businesses create wealth for communities and create ownership, avenues for ownership, in the communities.*

## TRI-Construction

Calvin Littlejohn is the founder and Chief Executive Officer of TRI-Construction, a Black-owned general contracting construction company in North Minneapolis. Over the past decade there have been discussions about developing the 927 building, but the Foundation's interest marked the first time that TRI-Construction was brought into the conversation through an ownership offer. Calvin states what this partnership means to his business:

*To be offered a level of ownership says . . . the Phillips Foundation [is] making sure that we are included [so] that we can share the economic opportunities that sometimes passes the African American community.*

Calvin also appreciates that the Foundation's approach to strategy includes coming to the table *without* prioritizing their own agenda; instead, the Foundation works to put community needs first. As a resident of the Northside, he has watched the business corridor change and grow but has also watched as the African American community has been held back from growing into a position of economic power. For Calvin, the development of 927 is just the beginning of redressing this longstanding issue. He asks:

*What level of foothold can we grab, but then turn around and pass that along, whether it's upcoming businesses, whether people are looking to get into construction, people are looking to do development? How can we grow from this opportunity and be in a position to pass that opportunity and learning along to others?*

## The Association for Black Economic Power (ABEP) & Village Financial Cooperative

In September 2016, after the police killing of Philando Castile, a group of community activists came to the Foundation with an idea to start a credit union in North Minneapolis. The credit union would function as another way to grow economic power within the Black community. The Foundation found this idea bold and innovative, and helped them establish ABEP and lead the

effort to build Village Financial Cooperative, which will be the only Black-led financial institution in the state of Minnesota. The institution’s mission is to create “*a financial institution that supports Black existence and financial health and well-being. [Village Financial] challenges the exploitative nature of traditional financial intuitions to seek the rejuvenation of Black, Indigenous, and low-income neighborhoods through cooperative economics.*” The Foundation initially invested \$500,000 for this effort, and the trustees directed Foundation staff to be intimately involved in the project, with Patrick serving on the founding ABEP board and assisting staff with fundraising. Village Financial Cooperative hopes to be fully operating by 2020. ABEP will function as the nonprofit partner of the credit union raising funds, running financial literacy programs, aiding in community organizing, and developing other economic tools. A former ABEP leader describes the excitement and anxiety for this financial institution in the Black community:

*There’s a little bit of anxiety around what if we’re not successful, what if we are successful. Then there’s this concept of this broader vision, of building out something that’s actually an ecosystem that we own, that we get to control, and we get to feed that vision . . . I’m really interested in seeing how we can replicate this model in other cities. I’m really interested in seeing how the model of this type of philanthropy or investment in Black communities and communities of color can influence the way the government works, can influence the way that larger national philanthropy works, can really start to shift the conversation around.*

## Enduring Legacy Lives On

In its current work in the Northside, the Foundation continues to fulfill its mission as a leader with a human-centered approach—one based on listening, mutual respect, taking risks and shared goals with community leaders, businesses, and organizations. This model can and should be replicated to help create ownership in historically marginalized communities experiencing generational disinvestment.

Throughout its history, the Foundation has always had a “*values-driven approach to doing the work.*”<sup>93</sup> Although funding priorities have shifted, its Jewish roots and correspondent values of diversity, inclusion, and community continue to direct its growth. The Foundation continues to teach its stakeholders that philanthropy should be a partner for real and meaningful impact that creates intentional community for long-term impactful change.

Dean Phillips speaks to the Foundation’s efficacy:

*Jay and Rose taught us that challenges and change are inevitable and that both should be embraced rather than feared. Communities will change, needs will change, geographies will change, and the family will change. But our commitment to investing in people, justice, equity and community must endure for generations to come.*



Corner of West Broadway and Dupont, with 927 West Broadway on the left (photographer Sarah White; courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).



Northside Minneapolis mural (Photographer Sarah White; courtesy of The Jay & Rose Phillips Family Foundation of Minnesota collections).

## Endnotes

1. Shtetels is a Yiddish word describing small towns with large Jewish populations, which existed in Central and Eastern Europe before the Holocaust.
2. Federation Chronicle. Jay Phillips, philanthropist with humility by Norman Diamond. January 1958. Jay Phillips Papers, 1920–1992. Box 1, 15,195 Historical Biographies folder. Minnesota Historical Society, Saint Paul, MN.
3. Speech given by Jay to the Jewish Theological Seminary of America on acceptance of the degree of Humane Letters, November 2nd, 1980. Phillips, Jay. Jewish Theological Seminary of America. Jay Phillips papers, 1920–1992. Box 2, Folder 1.5217, Page 2. Minnesota Historical Society, Saint Paul, MN.
4. The Jay & Rose Family Foundation Annual Reports from 1993 to present.
5. Weber, Laura. “Gentiles Preferred”: Minneapolis Jews and Employment 1920–1950.” *Minnesota History* 52, no. 5 (Spring 1991): 166–182. <http://collections.mnhs.org/MNHHistoryMagazine/articles/52/v52i05p166-182.pdf>; Dinnerstein, L. (1981). *Anti-Semitism Exposed and Attacked, 1945–1950*. *American Jewish History*, 71(1), 134–149. Retrieved from <http://www.jstor.org/stable/23882008>.
6. Cartoon, “Three Jehu Drivers”, 1938. Box 41. Jewish Community Relations Council of Minnesota: Council records, 1922–1974. Minnesota Historical Society, Saint Paul, Minnesota.
7. Weber, Laura. “Gentiles Preferred”: Minneapolis Jews and Employment 1920–1950.” *Minnesota History* 52, no. 5 (Spring 1991): 166–182. <http://collections.mnhs.org/MNHHistoryMagazine/articles/52/v52i05p166-182.pdf>; Nathanson, Iric. *Minneapolis in the Twentieth Century: The Growth of an American City*, 93–134. St. Paul: Minnesota Historical Society Press, 2010.
8. Although not an exhaustive list, Jewish community leaders have been creating Jewish organizations since the early 1900s. In 1907 the Jewish Home for the Aged was founded; In 1918, Jewish Sheltering Home for the Aged and Sholom Residence was founded; In 1929, the Minneapolis Jewish Federation was founded; In 1930, the St Paul Jewish Community Center was founded; In 1939, the Minnesota Jewish Council (later renamed Jewish Community Relations Council of Minnesota and the Dakotas) was formally created after the 1938 campaign; The Sabes Jewish Community Center in Minneapolis was founded in 1959.
9. Troska, Patrick. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, May 31st, 2018.
10. Phillips, Dean. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, May 31st, 2018.
11. Using the Consumer Labor Price Index that accounts for inflation.
12. Information gathered from The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interviews of Dean Phillips (May 31, 2018); Arlene Reed (May 4th, 2018); Pat Cummings (May 18th, 2018); Patrick Troska (June 11th, 2018).
13. Phillips, Dean.
14. Phillips, Dean.
15. Bernstein, Paula. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, April 20th, 2018.
16. Bernstein, Paula.
17. Box 3. Jay Phillips Papers, 1967–1991. Minnesota Historical Society, Saint Paul, Minnesota.
18. Phillips, Dean.
19. Troska, Patrick. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, May 12th, 2018.
20. Information gathered from The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interviews of Pat Cummings (May 12, 2018), Amy Crawford (May 31, 2018), and Patrick Troska (June 11, 2018).
21. Troska, Patrick. Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, May 31st, 2018.
22. Box 3, Folder: Jay Phillips Papers, University of Minnesota 1967–1981. “Remarks at the

- dedication of the Phillips-Wangenstein Research Laboratory, June 13th, 1978. Minnesota Historical Society, Saint Paul, Minnesota.
23. Phillips, Jay. Federation Drive. 1945. Jay Phillips papers, 1920–1992. Box 3, Speeches Files, Jewish Federation 1944–1990 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  24. Hadassah was formed in 1912 with the purpose to help meet the needs of Jewish people living in Palestine.
  25. Bernstein, Paula. Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, April 10th, 2018.
  26. This relationship went beyond just donating money to the Jewish Chair, but Jay also gave his time and energy to ensure the university lived in perpetuity by serving on the board. Additionally, Jay's grandson, Eddie, and great-grandson, Dean also served on the board.
  27. Merkle, Dr. John. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, June 6th, 2018.
  28. Dr. Merkle is a professor of theology at the College of St. Benedict and St. John's University and has been involved in interfaith work since the 1970s. He assisted in an informal capacity with St. John's Jewish Chair since it began. He served as Associate Director from 1996 until 2009, before taking on the responsibility as Director when they lifted the requirement the director be of Jewish faith.
  29. Merkle, Dr. John.
  30. Merkle, Dr. John. Phillips, Jay. Jay Phillips papers, 1920–1992. Box 3, Folder, 15.217. Minnesota Historical Society, Saint Paul, Minnesota.
  31. Phillips, Jay. Jay Phillips papers, 1920–1992. Box 3, Folder, 15.217. Minnesota Historical Society, Saint Paul, Minnesota.
  32. 13 families contributed to the original endowment; each gave a minimum of \$50,000, so an initial endowment was at least \$650,000.
  33. The Jay Phillips Chairs in Jewish Studies at St. John's University include: Rabbi Naham Schulman (1969–1983), Rabbi Michael Goldberg (1983–1985), Rabbi Mark Verman (1987–1993), and Rabbi Barry Cytron (1996–2009).
  34. Merkle, Dr. John.
  35. Phillips, Dean.
  36. Merkle, Dr. John.
  37. The United States Holocaust Memorial Museum. <https://www.ushmm.org/> Accessed, April 12th, 2019.
  38. Helen spent a year in an Iron Lung machine and eventually was able to breath on her own.
  39. Phillips, Jay. Wire read by Arthur Melamed at Federation Meeting held at Nicollet Hotel on May 1st, 1952. Israeli Bond Drive. 1952. Jay Phillips Papers, 1920–1992. Box 3, Speeches Files, Jewish Federation 1944–1990 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  40. Unknown author. "History of The origins of Courage Kenny Rehabilitation Institute". Retrieved from <https://www.allinahealth.org/Courage-Kenny-Rehabilitation-Institute/About-us/History/>.
  41. One such project was an endowment of \$75,000 in 1980 to Camp Ramah run by the Minneapolis synagogue, Adath Jeshurun, to assist children with disabilities at summer camp. Phillips, Jay. Letter addressed to President Irving Robbin. March 5th, 1980. Box 4 Volume 9. The Jay & Rose Phillips Family Foundation of Minnesota records, Minneapolis, Minnesota.
  42. University of Medical Bulletin. Spring 1981. Jay Phillips Papers, 1920–1992. Box 2, 15217 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  43. Weber, Laura. "Gentiles Preferred": Minneapolis Jews and Employment 1920–1950." *Minnesota History* 52, no. 5 (Spring 1991): 166–182. <http://collections.mnhs.org/MNHHistoryMagazine/articles/52/v52i05p166-182.pdf>
  44. Information was culled from an exhibit that was on display at the University of Minnesota's Elmer Andersen Library in Minneapolis, "A Campus Divided" from September 1 to October 31st, 2018. <https://www.continuum.umn.edu/2018/09/a-campus-divided/>
  45. Study commissioned by Mayor Hubert Humphrey in 1947, who was good friends with Jay



- and Rose Phillips. Report and Recommendations of Committees of the Minneapolis Community Self-Survey of Human Relations, 1947. Black/Jewish Relations research collection. Nathan and Theresa Berman Upper Midwest Jewish Archives, University of Minnesota Libraries, Minneapolis, Minnesota.
46. Minneapolis Federation for Jewish Service Record Book Volume 3, 1946–1951. Minneapolis Jewish Federation records. Nathan and Theresa Berman Upper Midwest Jewish Archives, University of Minnesota Libraries, Minneapolis, Minnesota.
  47. Mount Sinai Hospital Women's Auxiliary Bulletin, 1952. Mount Sinai Hospital Auxiliary records, Box 0001, Series 2: Newsletters. Nathan and Theresa Berman Upper Midwest Jewish Archives, University of Minnesota Libraries, Minneapolis, Minnesota.
  48. Phillips, Jay. 35th Annual Meeting the Mount Sinai Hospital Association. October 14th, 1986. Box 5 Volume 9. The Jay & Rose Phillips Family Foundation of Minnesota records, Minneapolis, Minnesota.
  49. Phillips, Dean.
  50. Phillips, Dean.
  51. Today, the Jewish population in Minnesota is just 1 percent. <https://www.jewishdatabank.org/databank/search-results/study/421>
  52. Schloff, Linda Mack, ed. "Who Knew?: Stories Unearthed from the Archives." Upper Midwest Jewish History 6 (Fall 2011): 105–107; Plaut, Gunther. *The Jews in Minnesota: The First Seventy-Five Years*. New York: American Jewish Historical Society, 1959.
  53. Sholom Home website. <https://www.sholom.com/index.html>
  54. Phillips, Jay. Dedication Ceremonies Sholom Home. June 3, 1973. Box 3 Volume 2 January – June 1973. Jay & Rose Phillips Family Foundation of Minnesota records, Minneapolis, MN.
  55. Phillips, Jay. Annual Meeting Sholom Home June 20th, 1977 Presentation of Award to Doctor David Tenebaum. 1977. Jay Phillips papers, 1920–1992. Box 3, Speech Files Testimonials 1952–1982 folder. Minnesota Historical Society, Saint Paul, MN.
  56. Biography of Jay Phillips prepared by Rabbi Goodman in 1978. Jay Phillips Papers, 1920–1992. Box 1, Speech Files folder. Minnesota Historical Society, Saint Paul, Minnesota.
  57. University of Medical Bulletin. Spring 1981. Jay Phillips Papers, 1920–1992. Box 2, 15217 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  58. University of Minnesota Foundation website. <https://conservancy.umn.edu/handle/11299/136430>
  59. University of Medical Bulletin. Spring 1981. Jay Phillips Papers, 1920–1992. Box 2, 15217 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  60. University of Medical Bulletin. Spring 1981. Jay Phillips Papers, 1920–1992. Box 2, 15217 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  61. Phillips, Jay. Remarks of Mr. Jay Phillips at University Board of Regents Luncheon. May 12th, 1967. Jay Phillips Papers, 1920–1992. Box 3, Speeches Files, University of Minnesota 1967–1981. Minnesota Historical Society, Saint Paul, Minnesota.
  62. Phillips, Jay. Board of Regents Saint John's University. July 20th, 1973. Box 3 Volume 2 January – June 1973. The Jay & Rose Phillips Family Foundation of Minnesota records, Minneapolis, Minnesota.
  63. Laird, David. Interview with David Laird & Carolyn Jones. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Oral History Project. June 1st, 2018.
  64. Minnesota Private College website. <https://www.mnprivatecolleges.org/about-mpcc/history>
  65. Read during Paula Bernstein's interview.
  66. Phillips, Jay. Letter to Mr. Richard Spiegel, President of Minneapolis Jewish Federation. August 19, 1983. Box 5 Volume 6. The Jay & Rose Phillips Family Foundation of Minnesota records, Minneapolis, Minnesota.
  67. Phillips, Jay. Boys & Girls Club of Minneapolis 1986 Evening with the Stars Benefit. 1986. Jay Phillips Papers, 1920–1992. Box 3, Speeches Files, 1982–1990 folder. Minnesota Historical Society, Saint Paul, Minnesota.
  68. In 2019 dollars, adjusted for inflation, this would be \$160 million in assets.

69. Bernstein, Paula.
70. Bernstein, Paula.
71. Bernstein, Paula.
72. As per the bylaws, there was one trustee per family unit represented from Minnesota, California, and Colorado. The trustees in the Grants Committee were Paula Bernstein, Suzan Levin, and Jeanne Phillips until 2003.
73. Thomas Cook was a friend and confidant to Jay and was hired as the Foundation's first executive director, serving the Foundation from 1974 until 1993. He continued to as a trustee and secretary for an additional year and died in 1975.
74. Cummings, Pat. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, May 18th, 2018.
75. Cummings, Pat.
76. Bernstein, Paula.
77. Cummings, Pat.
78. Bernstein, Paula.
79. Jones, Carolyn. Interview with David Laird & Carolyn Jones. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Oral History Project. June 1st, 2018.
80. 2002 The Jay & Rose Family Foundation of Minnesota Annual Report.
81. 2003 The Jay & Rose Family Foundation of Minnesota Annual Report
82. Crawford, Amy. Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, May 31st, 2018.
83. Crawford, Amy.
84. 2010 The Jay & Rose Family Foundation of Minnesota Annual Report.
85. Troska, Patrick.
86. Lamparty, Tracy. Interview with Tracy Lamparty & Joel Luedtke. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Oral History Project. August 9th, 2019.
87. Troska, Patrick.
88. Costain, Pam. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, June 11th, 2018.
89. Abdulla, Yusuf. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, June 11th, 2018.
90. American Council on Education. Race and Ethnicity in Higher Education Report, 2019. <https://www.equityinhighered.org/resources/report-downloads/>
91. Troska, Patrick.
92. Mekha, Repa. The Jay & Rose Family Foundation of Minnesota 75th Anniversary Project Interview, June 19th, 2018.
93. Troska, Patrick.

