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Jewish Identity, Social Capital and Giving

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Introduction

Marketers and marketing researchers have become accustomed to thinking about consumption behaviors as expressions of personal identity embedded in social networks. This paper argues that philanthropic behaviors (whether to donate or not, amount to donate, portfolio of donations) may likewise express personal identity in the service of, or resulting from, networks of social ties – that is may be mediated by social capital. The paper examines the relationship between Jewish identity, religious practice, social capital and philanthropy in the North American Jewish community. Using social capital theory the paper argues that Jewish identity gives rise to binding social capital. This network structure, in turn, induces members to support the network through philanthropic behavior, and makes network-mediated benefits available to members.

Literature Review

Jewish Identity and Its Behavioral Expression

On Yom Kippur, the most sacred holiday in the Jewish calendar, Jews around the world gather together in synagogues, social halls, school gymnasiums and community centers to mark the day. The traditional liturgy suggests that on this day each Jew's fate for the coming year, whether good or ill, is sealed. To be sealed for a good year, Jews are urged to pray (*tefillah*), to repent by returning to the ways of their people (*tschuvah*), and to give to charity (*tzedackah*). At the defining moment, when life hangs in the balance, Jews are told to express themselves in three very distinct forms of behavior – religious, communal and philanthropic. The Yom Kippur liturgy aptly illustrates the multidimensionality of Jewish identity. Jewish identity is widely understood to be a complex identification with a set of

religious beliefs and practices, with a historic people and culture, and with a social-political ideology of social justice (Cohen, 1998; Liebman and Cohen, 1999; Legge, 1999; Sharot, 1997). As illustrated by the example, expression of this multidimensional identity can take at least three distinct forms. First, identification with the religious aspects of Jewishness might be expressed through religious ritual practice such as fasting on Yom Kippur and attending religious services (Himmelfarb and Loar, 1984; Amyot and Sigelman, 1996). Second, identification with the ethnic aspects of Jewishness might be expressed through participation or connection to communal activities such as friendships, communication networks, endogamy (Kivisto and Nefzger, 1993). Third, identification with the political, social justice aspects of Jewishness might be expressed through political action and philanthropic activities such as donations of time or money to worthy causes (Sklare and Greenblum, 1979).

Given these three forms of expression, there are at least two ways of modeling the relationship between identity and philanthropic behavior. First, Jewish identity could be seen as the direct antecedent of each of the listed consequences – ritual, communal and philanthropy. Alternatively, identity could be the direct antecedent of some of the behaviors, but not all. In particular, the influence of identity may be mediated by its influence on ritual practice and communal ties. It is the goal of this paper to examine these two competing understandings of the relationship between identity and Jewish philanthropic behavior.

Philanthropy as a Direct Consequence of Jewish Identity

Marketing scholars have become accustomed to thinking about consumption and spending behaviors as both composite elements of and expressions of personal identity. Historically, the gender, social class, culture, and the cohort to which one was born defined one's identity. Today's society, however, provides for considerable fluidity in identity

definition (McCracken, 1986). Social actors are free to create identities of their choice on a minute-by-minute basis using *props* openly available in the social marketplace. Thus, Jean's consumption of Hunt's pasta sauce, Pastene canned tomatoes, Bertoli olive oil and Revere Ware cookware are acknowledged to both construct and express an Italian, traditional, wife and mother identity (Fournier, 1998). Alternatively, Vicki's consumption of Opium perfume, Intimate Musk, floral "everything", Ivory soap, Victoria's Secret and a drawer full of different shampoos constructs and expresses a post-modern identity in transition (Fournier, 1998).

Similarly, a portfolio of giving to the New Israel Fund, the United Way, the Hebrew University and the National Cancer Institute may contribute to the construction/expression of an American-Jewish identity. That is, philanthropic behaviors (whether to donate or not, how much to donate, and which causes to include in the portfolio) may also be used as *props* in the service of life themes, goals and projects (Mick and Buhl, 1992). The notion that charitable giving of time or money may be related not just to the worthiness of the cause, but also to issues of identity has been suggested in the Jewish sociology literature (Woocher, 1986) and in the business literature (Gainer, 1995). It implies that philanthropic activities provide *psychosocial meaning* to the donor, complementing the specific benefits that accrue to the recipient cause. Philanthropy not only rewards the donor with a generalized warm and fuzzy feeling, but also provides an important building block in the donor's construction of identity. It has been demonstrated that a strong identification with Jewish values of social justice leads to liberal, political behavior (see Legge, 1995a, b). Logically, such identification should also be related to high levels of philanthropic contributions, both Jewish and non-Jewish.

Seeing philanthropy as a behavioral expression of Jewish values of social justice, we might model the relationship between Jewish identity and philanthropy as simply a direct causal link. Jewish identity would thus be seen as giving rise to three possible

consequences, as depicted in Model 1. In this model higher levels, or stronger feelings of Jewish identity would be manifest as more religious practice, stronger communal ties and/or higher levels of philanthropic giving.

While this model is consistent with a tri-component conceptualization of the identity construct it also assumes that philanthropic decisions are made individually, independently and without outside, social influence. The model implies that whether to donate, and to whom, is a function of whether the particular donation is consistent with the individual's current personal identity themes, goals and projects. This view of philanthropic behavior fits within an economic stream of understanding that sees the "actor as having goals independently arrived at, as acting independently, and as wholly self-interested" (Coleman 1988, p.96).

An alternative conceptualization posits that philanthropy is certainly related to identity, but not directly. A discussion of the role of social networks, social norms and obligations, in other words social capital, suggests that identity may influence philanthropy indirectly through other mechanisms. In particular, the influence of Jewish identity on philanthropy may be mediated by binding social capital.

Binding Social Capital

Social capital refers to the features of social organization that facilitate cooperation and collaboration for mutual benefit (Putnam 1995). Theorists generally agree that the term 'social capital' represents the "ability of actors to secure benefits by virtue of membership in social networks or other social structures" (Portes 2000, p. 48). In other words social capital for individuals, organizations or communities is thought to exist within and through the structure of relationships. Networks of relationships characterized by extensive obligations, expectations, and trustworthiness; rich, multi-

plexed, information channels; and norms of reciprocity and collective interest are thought to possess high levels of social capital (Coleman 1988). Productive activity in such networks is facilitated because high levels of trust replace the need for formal or overt control mechanisms such as contracts and markets; network ties provide an efficient conduit for information transfer; and network sanctioned and supported norms encourage desired behaviors while discouraging undesirable ones. The value of such social capital has been demonstrated at the macro level in a community's enhanced ability to deal with social ills (Putnam, 1995); at the meso level in an organization's enhanced ability to achieve market success (Drumwright, Cunningham and Berger, 1999); and at the micro level in an individual's enhanced ability to develop human capital (Coleman, 1988).

It is also important to recognize that theorists speak of different 'types' of social capital. Close, even closed, ties between actors represent "binding" social capital. "Bridging" social capital is represented by weak ties that produce value by linking one tight network to another thereby filling structural holes. (See Granovetter 1973; Burt, 1992). While individuals involved in the Jewish community may be interested in the value of bridging social capital, it is binding social capital that is most illuminating in understanding the relationship between Jewish identity and philanthropy.

In his recent review of research on social capital, Portes (1998) presents a framework that embodies these different types of social capital. Particularly germane to the Jewish identity – Jewish philanthropy issue is the discussion of bounded social capital. Portes suggests that individual identification with a group, recognition of a common fate and feelings of "bounded solidarity" represent one of the antecedent sources of social capital. Portes' model suggests that the bounded social network mediates behaviors, benefits and consequences motivated by such identification. Portes argues that it is these feelings of

solidarity that motivate wealthy members of a community to give to the network, and gives needy members of the community access to the benefits made possible by the network. In other words it is bounded solidarity that creates “the ability to secure benefits through membership in networks and other social structures” (Portes’ definition of social capital, p. 50). Furthermore, it is the social capital (the structure of the network) that is the direct antecedent of the network-mediated benefits. The application of this model to the Jewish identity – Jewish philanthropy question is straightforward. Higher levels of Jewish identity (bounded solidarity) should lead to stronger networks of communal relationships (stronger social capital) that in turn lead to higher levels of network supported and supportive behaviors (philanthropy). The consequence of social capital in question here is the availability of benefits in a network. This can be studied in terms of benefits obtained or in terms of benefits provided. In the case of philanthropy, it is the latter sense that is being postulated.

A review of the Jewish sociology literature fully supports this conceptualization. Giving to Jewish causes, supporting Jewish communal activities, taking collective responsibility for the Jewish community around the world, is a highly ritualized act for communally involved Jews. The annual cycle of raising funds, making contributions, and celebrating those who raise and those who give is an integral part of Jewish communal life (Cohen, 1998). Indeed, some have argued that this activity forms the core of what Woocher (1986) calls “civil Judaism,” To the extent that individuals identify with this *polity*, become involved in its activities, and develop close ties to its members and leaders, they are likely to give more to the causes this community supports. They are likely to do so as a form of self-expression, as a way of securing a position in the community, and in order to construct a desired identity, either personal or public. In other words, Jewish philanthropy is seen not as a direct expression of identity, but rather as a consequence of close communal ties.

Philanthropy as a Consequence of Religious Practice

It goes without saying that Jewish identity also involves a religious component. An important consequence of Jewish religiosity is charitable giving. Considerable research in the fields of Jewish sociology and philanthropy suggests that the religious components of Jewish identity are related to Jewish philanthropy *through* their influence on religious practice. Research suggests that giving to charity, as a form of stewardship is a highly ritualized, religious act to religiously observant Jews (Heilman, 1991). Not only are *gemulat chassadim* (acts of loving-kindness) and *tzedakah* (charitable acts) extensively discussed in over 2000 years of Jewish writing (in the Tanach, Talmud, Codifiers, Commentaries, and Responsum: see Chambre, 1998), they also form part of the laws of observance of almost all significant Jewish holidays and festivals. Many synagogues schedule the launch of Israel Bond Drives, school fund-raising campaigns, and other financial efforts, to coincide with Yom Kippur. Many women put donations into their *tzedakah* boxes before lighting Sabbath candles. Giving to the poor is one of four *mitzvot* (commandments) to be observed in celebrating the holiday of Purim. Most communities mount food drives as part of their preparations for Passover. The pattern is clear. Both the concept and the practice of charitable giving are a logical and likely consequence of Jewish religious life. Thus we must acknowledge a relationship between Jewish identity and religious practice in any model of Jewish philanthropy.

These arguments suggest that both communal ties and religious observance mediate the relationship between Jewish identity and Jewish philanthropy. Model 2 illustrates this mediated conceptualization.

Model 1 and Model 2 portray two competing understandings of the influence of Jewish identity on philanthropy. Model 1 suggests that philanthropy is a *direct consequence* of identity, being

one of the three forms through which Jewish identity is expressed. Model 2, on the other hand, proposes that philanthropy only comes about through expressions of Jewish religiosity and communal ties. Notice that Model 1 (the direct-relationship model) is consistent with a universalistic pattern of giving, whereas Model 2 suggests a more parochial pattern of giving to Jewish causes. These competing models are tested using data from the 1990 National Jewish Population Survey.

Method and Data

Two analytical methodologies are used to gain insight into the propositions suggested. First, bivariate correlations of the focal variables are examined. Second, Baron and Kenny's (1986) moderator framework is used to examine the mediator hypotheses.

The Council of Jewish Federations, in cooperation with the City University of New York, sponsored the 1990 National Jewish Population Survey (NJPS). The data utilized in this study were purchased from the North American Jewish Data Bank. The NJPS is the latest representative, cross-sectional, individual household-level survey of the American Jewish population. It contains responses collected by telephone from a randomly selected sample of 2441 U.S. households that included at least one individual who at one time considered him or herself Jewish (was born Jewish or was converted to Judaism). All respondents were asked questions regarding denominational affiliation, demographics, and religious, communal, educational and philanthropic behaviors. In addition, one-third of the respondents were randomly selected to be included in each of three specific "modules." This analysis is based on the "identity" subset of the total sample (N=803) who were also asked a number of questions regarding the strength of their Jewish identity.

For purposes of this analysis, variables of interest are constructed as described below.

(Note: in creating composite scales all measured variables are standardized such that their mean is set to zero and their standard deviation is set to one.)

Jewish identity is a composite scale consisting of variables that tapped both attitudinal dispositions and denominational affiliation. Following Amyot and Sigelman (1996) the identity scale includes feelings regarding the importance of being Jewish, dependence on other Jews in a crisis, the importance of living in a Jewish neighborhood, and the significance of a child marrying a non-Jew. Added to these four items are two questions that indicate the respondent's and the household's Jewish denominational affiliation (e.g., Conservative, just Jewish, or other religion). Denominational responses are coded as 0 if the response represents either no religion or a current religious affiliation that is not Jewish¹, 1 if the response represents a Jewish affiliation but not one of the mainstream denominations (such as a response of "just Jewish" or "secular"), and 2 if the response is one of the mainstream denominations (Conservative, Reform, Orthodox or some combination). After item standardization, this six-item scale demonstrates a strong reliability index of alpha = .80.

Religious practice is a composite scale of responses to eleven questions regarding specific practices. These practices are frequency of synagogue attendance, lighting of Sabbath candles, Passover Seder attendance, Kosher meat, separate meat and dairy dishes, Chanukah candles, not having a Christmas tree, Purim celebration, celebrating Yom Haatzmaut, fasting on Yom Kippur and not handling money on the Sabbath. Answers to each question are coded on ordinal scales such that higher numbers represent more Jewish ritual behavior. After standardization, this eleven-item scale demonstrates a strong reliability index of alpha = .84.

Communal embeddedness is a composite scale of six items measuring communal ties

that range from those that are very intense and personal (such as familial relations) to those that are more moderate and public (such as organizational memberships). In particular, the scale includes measures of the inter-religious composition of the household; the proportion of close friends that are Jewish; the character of the neighborhood; the number of Jewish organizations (not including synagogues) on which the respondent has served; the number of Jewish organizations (not including synagogues) to which the respondent belongs; and whether the respondent has paid subscriptions to Jewish periodicals. After standardization, this six-item scale demonstrates an acceptable level of reliability at $\alpha = .71$.

Jewish philanthropy is measured as a scaled item that represents the dollar amount reported to have been contributed to Jewish philanthropies, charities, causes or organizations. The scale ranges from 0 (for no contributions) to 6 (for \$10, 000 or more). A comparable scale is computed for contributions made to non-Jewish philanthropy.

Results

The table below displays the simple bivariate correlations between our focal variables. All relationships between the identity and Jewish behavioral variables are positive, strong and statistically significant at probabilities less than 0.001, whereas the relationships with non-Jewish philanthropy are either negative (in the case of identity) or not statistically different from zero. Also noteworthy is the fact that the relationship between identity and Jewish philanthropy is markedly lower than that between identity and the other hypothesized expressions of identity. These two findings question the direct relationship between identity and philanthropy.

Table 1: Correlation Analysis

Secondly, if it were the case that philanthropy represents an

expression of Jewish values of universalistic social concern and social justice, then there should be a

| | Identity | Ritual | Communal | J. Philanth. | Non-J. Phil. | HH Income |
|--------------|-----------|-----------|----------|--------------|--------------|-----------|
| Identity | - | | | | | |
| Ritual | .69 | - | | | | |
| Communal | .59 | .67 | - | | | |
| J. Philanth | .46 | .54 | .64 | - | | |
| Non-J. Phil. | -.08 | .05 n. s. | .13 | .33 | - | |
| HH Income | .06 n. s. | .08 | .17 | .31 | .36 | - |

significant positive relationship between Jewish identity and all kinds of philanthropy, including non-Jewish philanthropy. The relationship might not be as strong as that between identity and Jewish philanthropy; nevertheless, it should be greater than zero. If Jewish identity represents a universalistic concern for social justice, equality and a responsibility for weaker members of society, then stronger Jewish identity in a Diaspora community should lead to giving to both Jewish and non-Jewish causes. The fact that it does not calls into question the social justice hypothesis of a direct relationship.

Mediated Regression Analysis

The correlations displayed in Table 1 indicate strong relationships between identity and the variables hypothesized to be behavioral consequences of identity, and between the behaviors themselves. Baron and Kenny's (1986) analytic framework is used to examine the mediated hypothesis proposed by Model 2. Baron and Kenny argued that mediation exists when it can be shown that the demonstrated influence of an independent variable on a dependent variable is reduced (reduced to non-significance for complete mediation) once the effect of a mediating variable is accounted for. To demonstrate mediation, three things need to be shown. First, it must be demonstrated that there is a significant relationship between the antecedent variable (in this case, identity) and the

target dependent variable (Jewish philanthropy). Second, there must be a relationship between the antecedent variable and the proposed mediators (in this case, between identity and ritual behaviour and identity and communal embeddedness). Third, when the influence of the mediators is accounted for, the influence of the antecedent variable on the target dependent variable is substantially reduced. Thus, mediation can be tested by examining four regression equations: regressing Jewish philanthropy on identity; regressing ritual practice on identity; regressing communal embeddedness on identity; and regressing Jewish philanthropy on ritual practice, communal embeddedness and identity. Because household income represents a significant “other” variable that needs to be accounted for in any explanation of philanthropy, income is included in all models of philanthropy. Table 2 reports the results of the relevant regression analyses.

Table 2: Mediated Regression Results

| Dependent/ Independent | Reg. 1 J. Phil. (t-value) | Reg. 2 Ritual Practice | Reg. 3 Comm Embed. | Reg. 4 J. Phil. | Reg. 5 J. Phil. | Reg. 6 J. Phil. |
|-----------------------------------|---------------------------------|------------------------------|--------------------------|--------------------|--------------------|--------------------|
| Identity | .59 (13.0) | .63 (26.6) | .56 (21.5) | .21 (3.6) | .18 (3.7) | .06 (1.2) |
| Ritual Practice | | | | .65 (9.5) | | .30 (4.2) |
| Communal Income | .26 (8.0) | | | .25 (8.1) | .80 (14.5) | .68 (11.2) |
| | | | | | .20 (6.8) | .20 (7.0) |
| Adj. R-squared | .28 | .48 | .38 | .37 | .46 | .47 |

The results show a mediated influence of identity on Jewish philanthropy. This can be seen by the significant coefficient on the identity variable in regression 1 that is systematically reduced to zero (non-significance) as the influence of ritual practice (Regression 4), communal embeddedness (Regression 5) and both ritual practice and communal embeddedness (Regression 6) is accounted for. In tracing these effects, it is

important to note that each of ritual practice and communal embeddedness mediates some aspect of identity, but neither does so completely. Only when both mediators are included in the regression model is the influence of identity non-significant.

These results indicate that rather than being a direct expression of Jewish identity, Jewish philanthropy instead is a joint consequence of Jewish religious practice and communal ties. It is these mediating constructs that are the direct antecedents of Jewish giving. This mediated pattern helps to explain the parochial character of Jewish giving. Jewish giving is inward directed because it comes about as a consequence of Jewish religious behavior and Jewish communal ties.

Discussion and Conclusions

These results have implications both for the Jewish community and for the greater philanthropy community. First, the finding that Jewish philanthropy is parochial is consistent with recent challenges to the social justice hypothesis (see Fein, 1988; Legge, 1999). As implied in Cohen (1998) and as is evident here, a strong Jewish identity is consistent with strong religious observance and strong communal ties, and therefore generosity to Jewish causes. The results provide no evidence that a strong Jewish identity leads to charitable acts of a more generalized or universal nature.

Second, the finding that Jewish philanthropy results from communal ties should raise serious concerns for the Jewish philanthropic community. Recent evidence makes clear that while Jewish religious activity is holding steady, Jewish ethnic affiliation “as we have known it” is declining (see Cohen, 1998). Whether this is because of societal trends away from public sources and expressions of identity toward more private ones (Cohen and Eisen, 1998), because of societal declines in civic activities (Putnam, 1995) or because of specific forces within the Jewish community remains a subject of debate and research. Suffice it to say that to the extent that Jewish communal ties are declining,

growth or stability in Jewish philanthropy “as we have known it” is certainly threatened.

However, movement away from communal affiliation and philanthropy “as we have known it” is not necessarily movement away from affiliation and philanthropy per se. Recognizing that religiosity, affiliation and philanthropy can be both expressions of and constituent elements of Jewish identity means that as identity changes and is changed, so will its forms of expression change. If identifying, affiliating Jews are now seeking more personal forms of expression, then certain religious rituals (home-based, family-based) may take on greater importance. Similarly, personal, relationship-based communal activities (“parlor-style” Bible classes) may take on greater importance. These more personal forms of identification and expression may in turn lead to more personal forms of philanthropic giving. This might explain, for instance, the baby-boomer cohort’s obsession with having a greater say in how their money is used (Wertheimer, 1997:20), with developing personal relationships with recipients (Wertheimer, 1997:14) and with seeking hands-on experiences (Wertheimer, 1997:58). Clearly the philanthropy may still exist, though its meaning, and therefore its form, may change.

This perspective challenges fundraisers to recognize the religious and communal identity-building benefits of philanthropy. Fundraisers might focus their attention not just on raising funds but also on how their very fund raising activity builds and/or reinforces religious and communal meanings. More than being a mere by-product of the activity, these meanings may represent the core benefit received by donors and may be the long-term antecedents of future donations. Fundraisers should recognize that the philanthropy opportunities they provide represent identity props or tools for their donors. The question they need to ask is what are the identity *needs* of potential donors? What is the nature of the identity they are trying to construct? How can a gift to this cause speak to that need?

Furthermore, it may be instructive to consider that the use of philanthropy as an

identity prop may be particularly valuable to potential donors who are experiencing identity transition, such as young adults who are leaving the parental home, first-time home buyers, parents of children entering elementary school, and new retirees. This suggests the need for strategically targeted funding campaigns (on college campuses, through early childhood education institutions, or through seniors clubs, for example) that speak to the unique identity issues faced by each identified donor segment.

While this analysis focuses exclusively on the U.S. Jewish community, the conclusions are by no means restricted to this community. There are important implications for culturally specific fundraisers, and fundraisers in general. In particular, the idea that philanthropic giving carries important psychosocial meaning can have implications for all cause managers. Managers may want to think about what meanings their causes convey, to whom such meanings are most beneficial, and therefore how best to segment and target an increasingly diverse population.

Finally, the study raises some interesting and important theoretical issues regarding the identity construct and its expression. This paper adopted the perspective that identity is a social construction and tested the power of two static models of its expression. However, how best to understand and model the circular, dynamic, iterative process implied by a constructive framework remains an open question. Furthermore, some in the Jewish sociology field feel that Jewish identity is not only constructed, but is also, contested. What it means to be a “Jew”, an “American Jew” or a “good American Jew” varies by individual and context. How best to study and understand this contested terrain also remains for future study.

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