



IMPROVING HEALTHCARE BY INVESTING IN THE FUTURE OF NURSING

Creating a Legacy

What is a legacy? How will you be remembered? Such questions tend not to be asked early in life. How they are answered, at whatever stage of life, can be the defining elements of transformational philanthropy—giving that truly changes individual lives or communities, or addresses more global concerns.

As lifelong New Yorkers, Barbara and Donald Jonas combined professional success along with community service. Starting in the mid-1970's, Barbara and Donald Jonas began to invest in art, focusing on Abstract Expressionism, and eventually amassed a collection of great consequence and value. In 2006, they decided to sell select works from their art collection to establish the Barbara and Donald Jonas Family Fund at the Jewish Communal Fund. According to *The New York Times* obituary for the Bronx-born Barbara Jonas, she said at the time of the sale, "we decided that we wanted to do some things in our lifetime, especially for New York City where we have lived our whole lives."

Having generated the liquid financial resources "to do some things," Barbara and Donald Jonas were left to determine the purpose of their philanthropy. They asked themselves, where could we make a big difference with a limited pool of funding? Together with their philanthropic advisors, they reviewed a wide range of program options, examining the context, data, proposed intervention, and anticipated impact for each one. They wanted to make a social investment that would generate high social returns. They also expected to be personally engaged as philanthropic partners, and visibly associate their names with the selected cause.

The fulcrum is the point where the greatest leverage can be induced; Barbara and Donald Jonas were looking for a proverbial philanthropic fulcrum. According to former Jonas Philanthropies CEO, Darlene Curley, they chose to focus on doctoral education for nurses "because they believed such an investment would be the most effective way to improve health outcomes." As Donald Jonas told *The Chronicle of Philanthropy* in 2008, "We were looking for an uncrowded beach, something that we could be very deeply involved in, because that's what we wanted to do, not just write a check."

Jonas Scholar and Army Nurse Melissa Perkins presents her first poster at the TriService Nursing Research Program in San Antonio.



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The idea was to care for those who care for us.”

– DONALD JONAS

Jonas Scholar Lisa Mansfield is a PhD student at Duke University School of Nursing, where she studies the effects of HPV vaccinations among adolescents.



Barbara and Donald Jonas were not the typical “grateful patients” who identify with hospital philanthropy, or the “cure seekers” supporting research to address a specific disease or condition. With their program choice, they were aiming to do something with a larger purpose that would improve the quality of front-line healthcare by elevating the quality and quantity of highly-skilled nursing professionals. To make a meaningful difference, they were aiming for a fulcrum, where their resources could be highly-leveraged, and they saw the funding of nursing education leadership at the doctoral level as such a point. The idea was to “care for those who care for us.”

With an estimated four million employees nationwide, nurses represent the largest segment of the U.S. healthcare workforce. Yet the profession’s talent pipeline is notoriously weak: U.S. nursing schools rejected an estimated 64,000 qualified applicants in 2016 due to insufficient levels of faculty, according to the American Association of Colleges of Nursing. In addition, there is an expected 30 percent turnover rate of faculty by 2024. Between the growth in new positions and the need for replacements holding current positions, the U.S. nursing shortage is expected to surpass one million by 2024. Without an infusion of faculty who could address the profession’s new and increasing skill requirements and research to advance the field’s science and practice, the nation’s demand for nursing professionals would remain unfulfilled.

A seminal 2005 National Academy of Sciences report, *Advancing the Nation’s Health Needs: NIH Research Training Program* called for “nursing to develop a non-research clinical doctorate to prepare expert practitioners who can also serve as clinical faculty.” A subsequent 2010 report, *The Future of Nursing: Leading Change, Advancing Health*, issued by the Institute of Medicine (IOM), called for a doubling of the nursing population with doctoral degrees. The philanthropic response by Barbara and Donald Jones to these two compelling calls-to-action was the creation of Jonas Scholars, the signature effort of what became known as Jonas Nursing and Veterans Healthcare (JNVH).

Developing Nursing Leaders

Today, the Jonas Scholars program provides scholarships of up to \$10,000 to support tuition of a nursing doctorate. Scholars are also given access to leadership development and professional networking opportunities. The Jonas Scholars program is implemented in partnership with the American Association of Colleges of Nursing, and the Scholars are selected by partner Schools of Nursing using specific criteria provided by Jonas Nursing and a competitive review process. Since the program’s launch in 2006, 1,000 Jonas Scholars have earned their doctorates at 157 higher education institutions across the nation; about one-third of these Scholars are focused on

JONAS LEADERS

To “build the brand” for the Jonas Scholars, the program founders targeted promotion of their efforts with nursing profession leaders and influencers; they also sought out candidates across the nation with the explicit goal of having Scholars represent all 50 states.

One such Jonas Scholar was Wanda Montalvo, a community health expert, who had worked across the nation with federally qualified health centers, professional trade associations, public health, and federal agencies. Having grown up in an upper Manhattan neighborhood that is home to a large low-income, predominantly Hispanic population, Montalvo entered the nursing profession with a strong desire to address health disparities in primary care. Her hands-on efforts to improve outcomes for such chronic conditions as asthma and childhood obesity earned her numerous recognitions, including awards from the U.S. Surgeon General. Following a life-changing experience as a Robert Wood Johnson Nursing Fellow, Montalvo began studies in 2012 toward a Ph.D. at the Columbia University School of Nursing, where she was selected as a Jonas Scholar.

Jonas Scholars are expected to complete a Leadership Project that addresses a need identified in the 2010 IOM report and meets criteria determined by their respective school of nursing. In 2013, Montalvo’s Jonas Leadership Project focused on the need to develop greater numbers of transformational nurse leaders in New York City. By collaborating with several nursing organizations, she was able to launch a new mentoring effort for nurse leaders; as a result, 177 individuals pledged to help mentor an emerging nurse in leadership and health policy. In further recognition of her professional accomplishments, Montalvo was selected in 2018 as a Fellow of the New York Academy of Medicine for its Nursing Section and in 2019 as a Fellow of the American Academy of Nursing.

improving veteran healthcare. Being designated a Jonas Scholar generates a special source of pride for these doctoral candidates, who also benefit from becoming part of a national learning network that is helping to transform the nursing profession.

JNVH also created partnerships between nursing schools and healthcare institutions to bring greater attention to other pressing issues and unmet needs in the nursing profession. In the early years, partnerships were initially supported with three-year grants ranging from \$200,000 to \$500,000. Two New York City examples illustrate these partnerships: In the first case, the nursing department of the City University of New York (CUNY) Lehman College worked with Bronx-Lebanon Hospital to increase their number of Hispanic nursing students and provide mentoring and tutoring to help improve their completion rate. In another instance, the nursing school at Pace University worked with Mount Sinai Medical Center to train nurses from communities of color on how to provide better care for mentally ill patients.

JNVH hosts a bi-annual leadership conference in partnership with the Association of Colleges of Nursing. Perceived as a must-attend event in the nursing field, the 2017 Jonas Scholars Leadership Conference brought together more than 400 of its doctoral nursing scholars. During this three-day convening, Scholars examine hot topics within the nursing profession such as patient safety, and network with industry and policy leaders. The [2017 Leadership Conference](#) was also supported by other funders, including the Cornell Douglas Foundation and Josiah Macy Jr. Foundation, plus sponsorships from Schools of Nursing from across the country.

Lasting Legacy

During JNVH’s first decade, Barbara and Donald Jonas made gifts totaling \$25 million to prepare the next generation of nursing education leaders across the nation. They enjoyed supporting Scholars they got to know and were pleased with the program’s distinguished reputation. But they were then confronted further with the question of legacy: In what form would this work continue after they were gone, if at all? They considered several alternatives and determined that their mission of advancing nursing education leadership development would best be realized through a more formal organizational approach. In consultation with family members and various professionals, they decided in 2015 to establish The Jonas Nursing and Veterans Healthcare, an independent entity to be located at Columbia University’s School of Nursing under a 10-year, \$11.1 million grant.

In announcing Jonas Nursing and Veterans Healthcare, Donald Jonas said, “Together, we will create and support excellent educational opportunities

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The essence of JNVH was to be an investment that pays forward.”

– DR. WANDA MONTALVO

for nurses and, as an interdisciplinary, collaborative entity, enhance public focus on the health of our country's veterans.” Then Jonas Philanthropies CEO Curley said at the time, “The decision to move Jonas Nursing was equal parts pragmatic and visionary.” She added, “At Columbia Nursing, and together with all of our valued partners, our mission to develop outstanding faculty, advance scholarship, and spark innovative practice will not only endure, but will be enhanced.”

In 2018 the evolution of the Jonas Center into the Jonas Nursing and Veterans Healthcare continued when the Jonas Philanthropies was launched. While remaining focused on improving healthcare outcomes, the Jonas Philanthropies program portfolio now includes Vision and Children's Environmental Health to support efforts that address low vision and blindness, and the impact of environmental factors on prenatal and child health outcomes. Jonas Nursing and Veterans Healthcare is now led by one of its own, Jonas Nurse Leader Scholar Dr. Wanda Montalvo, who has returned to serve in a pivotal leadership role that her younger self could not have imagined. Dr. Montalvo said that the essence of JNVH was to be “an investment that pays forward,” and she herself was a beneficiary of this long-term mindset. She is aided in the work of the Jonas Philanthropies by a growing network of Jonas Scholar alumni, who are becoming the transformational healthcare leaders envisioned by Barbara and Donald Jonas at the outset.

As cited in her *The New York Times* obituary, “Barbara Jonas had a deep understanding of the value that doctoral education could have on health policy outcomes,” and how influential that could be in nursing, said Professor Bobbie Berkowitz, dean emeritus of the Columbia University School of Nursing. Together with her husband of 65 years, she was able to both advance and advocate for a vital yet undervalued profession and achieve a lasting legacy.

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Photos: Jonas Philanthropies

For more on Jonas Philanthropies and the Jonas Scholars program, visit jonasphilanthropies.org/nursing-and-veterans-healthcare.

This case study is one of 12 in a suite of case studies focused on how donors are supporting scholarships to create change. These case studies showcase the rich and varied narratives of giving in the scholarships space, giving insight to the philanthropy landscape and approach for foundations, academics, and practitioners.

The case studies have been developed in companionship with Candid's project [Scholarships for Change](#), a dynamic hub that pulls together data and knowledge to tell the story of how philanthropic dollars are supporting transformative scholarships. It includes a mapping tool and a repository of reports and case studies to learn from peers. The site was made possible through the generous support of The Ford Foundation and The Andrew W. Mellon Foundation. Please visit scholarshipsforchange.org to explore further.