JEWISH FUNDERS NETWORK

Grantees and Their Funders

How Professionals at Jewish Not-for-Profits Experience Working with Grantmakers

JACK WERTHEIMER

GrantED

Stronger RELATIONSHIPS.
Greater IMPACT.

March 8, 2021

Dear Friend,

"Grantees and Their Funders" by Professor Jack Wertheimer was first published a year ago, but we are re-issuing it now to mark the launch of the project it inspired: GrantED.

GrantED: Stronger Relationships, Greater Impact is a joint project of Jewish Funders Network and UpStart designed to strengthen relationships between Jewish philanthropists and the Jewish nonprofit sector, specifically between grantmakers and grantseekers, so we can share in the work of building and sustaining a vibrant Jewish community.

GrantED (jgranted.org) creates and curates articles, tools, and other materials to inspire and inform grantmakers and grantseekers in the Jewish community, organizing around four core interdependent components of successful grantmaking partnerships: strengthening relationships, understanding and addressing power dynamics, sustaining impact, effective communication.

GrantED also offers workshops, facilitated conversations and other programs. To learn more visit jgranted.org and sign up for its email list here.

Based on interviews with 140 senior professionals at North American Jewish not-for-profits, "Grantees and Their Funders" provides a rare opportunity to hear honest feedback from those who might otherwise be reluctant to speak openly.

While these professionals reported largely positive experiences with funders, they also shared feedback that we believe is important to address to ensure that Jewish resources are used as efficiently as possible and that the Jewish nonprofit sector is adequately supported in its important work serving the Jewish community. Funders and Jewish professionals are interdependent; while the community cannot function without philanthropic support, funders rely on the expertise and hard work of nonprofit professionals as partners in bringing goals and dreams to fruition.

Please take the time to read this report, share it with your friends and colleagues, and let us know what you think, both of the report and GrantED.

Thank you for being a part of this important conversation.

Sincerely,

Andrés Spokoiny
President & CEO
Jewish Funders Network

JEWISH FUNDERS NETWORK

UPSTART

Grantees and Their Funders

How Professionals at Jewish Not-for-Profits Experience Working with Grantmakers

JACK WERTHEIMER

JEWISH FUNDERS NETWORK

Jack Wertheimer is a Professor of American Jewish History at the Jewish Theological Seminary, where he served also as Provost for a decade. For over a dozen years, he served as director of a Center for Research and Policy at The AVI CHAI Foundation, overseeing projects ranging from a census of Jewish supplementary schools to a study of young Jewish leaders, from studies of good supplementary schools to case studies of how Jewish day schools address challenges.

He writes on the religious, communal and educational spheres of American Jewish life, particularly in recent decades. His most recent book, *The New American Judaism: How Jews Practice Their Religion Today* (Princeton University Press, 2018) received a National Jewish Book Award. Among his writings on Jewish philanthropy are *Giving Jewish: How Big Funders Have Transformed American Jewish Philanthropy* (The AVI CHAI Foundation, 2018).

Jewish Funders Network is the global networking organization for Jewish philanthropists, with members in 13 countries worldwide and offices in New York, Israel, and Los Angeles. JFN members' annual charitable giving is estimated at over $1 billion. JFN is a community that grows the size and impact of Jewish philanthropy by connecting funders together, empowering individual excellence, and catalyzing collective action. We work for a vibrant, meaningful, inclusive, interconnected, creative, and compassionate world.

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Executive Summary

This report has been commissioned in conjunction with a new initiative to strengthen the ecosystem of Jewish philanthropy in North America. Recognizing the massive transformation of Jewish giving patterns over the past quarter century, the Jewish Funders Network is developing a concerted response to an altered communal environment.

Major factors reshaping Jewish philanthropy include:

- The explosive growth in the number of foundations with a commitment to Jewish causes;
- A large number of foundations created by Jews that have no Jewish-specific mission;
- The even more numerous donor-advised funds channeling the giving of individual Jews;
- The ever-growing number of Jewish not-for-profits; and
- The emergence of new challenges, internal and external, facing Jewish communities at home and abroad.

With the dramatic surge in new players on the scene, many of whom come to Jewish giving with assumptions very different from those of an older generation of donors, the relationships between not-for-profits and their funders are quite different today than they were in the second half of the 20th century.[1] In light of these significant changes, the time has come for a fresh inquiry into how well funders and grantees work together and whether some reforms might result in more effective philanthropy, leading to stronger North American Jewish communities.

The wider arena of North American philanthropy is fostering similar conversations about funder effectiveness. As Phil Buchanan, Chief Executive for the Center for Effective Philanthropy (CEP), notes in a book published in 2019: "Givers of all types are under more scrutiny today than they were even five years ago.... More and more books and articles are questioning the motivations and efficacy of big givers."[2] The goal of some who engage in such scrutiny is to press for changes in the legal structure that has made philanthropy the vast enterprise it is today in America. For others, the goal is to learn about the opportunities and challenges in the philanthropic arena, and bring about reforms to ensure more effective grantmaking and the best utilization of resources by not-for-profits. The latter is the objective of this report. Simply put, some practices of foundations and individual funders—and some responses to them by grantees—are wasteful of money, time and the talents of personnel.

To inform that conversation, this study looks at the field *mainly* from the perspective of grant *recipients*, rather than funders. Through interviews with 140 professionals at Jewish not-for-profits operating on the local, regional, national or international level, this study explores how grantees perceive working with their philanthropic supporters. Interviewees were asked explicitly to speak about both positive and negative experiences with funders.

What purpose is served by offering these perspectives? It is not common for grant recipients to speak with candor to their funders about problematic aspects of their relationship. While funders regularly evaluate their grantees to determine whether goals have been met and their money has been well-spent, grantees hold their tongues when frustrated or disappointed by their funders. As a recent report by CEP notes, "Given the inherent power dynamic between grantmakers and grantseekers, it is challenging for funders to get candid feedback from grantees and grant applicants." [3]

[1] I have detailed these developments in *Giving Jewish: How Big Funders Have Transformed American Jewish Philanthropy*, issued by The AVI CHAI Foundation in March 2018. https://avichai.org/wp-content/uploads/2018/03/Giving-Jewish-Jack-Wertheimer.pdf

[2] Phil Buchanan, *Giving Done Right: Effective Philanthropy and Making Every Dollar Count*. New York: Public Affairs, 2019, pp. 50–51.

[3] Naomi Orenstein, "Grantee Voice: Nonprofit Suggestions for Funder Improvement." Center for Effective Philanthropy, January 31, 2019. https://cep.org/grantee-voice-nonprofit-suggestions-for-funder-improvement/

For this reason, organizations on the national scene concerned about improving grantmaking survey grantees anonymously to ask about their experiences with their funders. Prior to this report, no such effort has been undertaken to elicit the views of a broad cross-section of Jewish professionals about their interactions with funders.[4] To maximize candor, all interviewees were promised that their remarks would be treated as "on background;" no views would be attributed to any particular interviewee and no funder would be named. (I have honored that commitment but have listed nearly all interviewees, except those who preferred to remain anonymous, in the Acknowledgments.)

The purpose of this report is to learn about the positive and not so positive experiences of grantees when working with funders, and to give voice to the perceptions and experiences of grantees, views they may feel impolitic to express directly to their funders. Given the vast size of the Jewish philanthropic enterprise—both in the numbers of big givers and the sums granted—the predominant emphasis of interviewees was upon their positive experiences. Professionals at Jewish not-for-profits stressed their high regard and appreciation for the generosity of donors, the thought partnerships they enjoy with funders and their warm personal relationships.

Indeed, almost to a person, interviewees had very positive experiences to relate. Many marveled at the continuing importance of personal relationships—with individual funders and with foundation board members and staff—as the essential ingredient for cooperative work. Quite a few made reference to the family celebrations to which funders invited them. They had much to say about how funders have helped their organizations think through new initiatives, offering expertise and helpful advice. Several spoke about funders who understood that not all projects succeed and did not take disappointing outcomes as proof of failure, but instead learned from them. Professionals were thrilled with the level of interest funders took in the overall success of their not-for-profits and delighted in the willingness of funders to make site visits to observe programs in action. Many cited the caring approach of individual donors "who get it," who understand the needs of grantees and see to the sustainability of grantee institutions. Many also spoke with a sense of awe about the dedication and generosity of donors who reach deeply into their pockets to ensure the success of institutions and causes.

But even those who were most effusive in their appraisal of their funders also shared frustrations and critiques about aspects of the relationship. Those negative experiences are included here without sugar-coating in the hope that some problematic patterns can be rethought; and where the perspectives of professionals at not-for-profits and funders differ, those on both sides of the figurative table may gain a clearer appreciation for each other's constraints and goals. That said, readers are cautioned to hold in balance both the positive overall experiences coupled with negative ones.

When asked about negative interactions, most interviewees offered examples of difficult experiences with individual funders and foundations. Some funders exploit the power imbalance and condition their giving upon inappropriate demands. Professionals cited examples of funders who spoke abusively to staff members at their not-for-profits or demanded unreasonable changes to programs, including some at odds with the mission of the organization. In some cases, they attached unethical demands, conditioning their gifts on access to private financial information or upon the dismissal of a staff member or on controlling oversight of an entire project. A significant portion of interviewees—females and males—were all-too-aware of female staff members at their Jewish not-for-profits who were on the receiving end of demeaning comments, inappropriate flirtatiousness, and/or unwanted touching by some individual funders.

Foundations too were critiqued, generally about policy matters rather than interpersonal behavior. Grantees frequently lamented the need for what they regard as an inordinate amount of time required to complete grant applications. Though many staff members found it helpful to measure the impact of their programs, as requested by funders, they also were put off by the sheer quantity of reporting and regarded the obsessive need to quantify outputs as inappropriate for the types of programs they run. They spoke of an obliviousness on the part of many foundation personnel (and also individual donors) to the time constraints of staff at not-for-profits who were expected to be on call 24/7 to answer funders' questions.

[4] A few foundations with a Jewish mission have enlisted the CEP to survey their own grantees.

The refusal of many foundations to pay for overhead costs especially rankled because it reflected a lack of interest in the institutions delivering a program needed by funders. Professionals also found it difficult to navigate the bureaucracy of many foundations. And they complained of the slowness of foundation staff to respond to *their* questions and the officiousness of some younger foundation staff members who seemed to have little respect for highly experienced Jewish professionals working at not-for-profits.

This list of grievances is not exceptional when compared with critiques of foundations in the wider philanthropic arena. Similar complaints recur about foundations operating in the non-sectarian sector. Some issues raised by professionals, however, have a specifically Jewish dimension. Top professionals worried that the emergence of a philanthropic system driven by the pet projects of individual funders harms less "sexy" (a term widely invoked) but basic Jewish needs, leaving them unsupported. Others worried about the outsized influence big funders have in setting communal priorities. And some commented on the inevitable responsibility of foundation staff to satisfy their principal funders, even if those funders are devoting their largesse to the wrong initiatives. Though money is disbursed solely at the discretion of wealthy individual funders and foundations, the perspective of some professionals at grantee organizations is that there is a conversation to be had about whether those funds are being put to the best uses to address challenges facing North American Jewry.

This report does not shrink from citing criticism of grantmakers. If the field is to mature, it will have to consider the perspectives of grantees, even if funders perceive matters very differently. That said, it is not the contention of this report that the system is broken. Nor are the individual cases of bad behavior the norm. *It would be a gross distortion of what interviewees reported to treat their examples of negative experiences as the dominant story.*

For the purpose of offering some balance and generating dialogue, I have included observations gleaned from a select number of individuals on the funder side—foundation professionals *and* individual donors—who were asked how they respond to some of the grantees' critiques. Precisely because so little honest conversation occurs between funders and their grantees about the larger mission of grantmakers, it's important to present some funder perspectives. The observations included here serve neither as a rebuttal of grantee critiques nor do they suggest that all funders hold the same views (indeed, contradictory funder viewpoints are included). The views of some on the funding side are meant as a further spur to conversation about the complex issues raised by grantees.

At various points, this report includes more sustained commentary by a few grantees (denoted with a blue line) and funders (denoted with an orange line) expressed in their own words. These sidebars will expose readers to examples of misalignment of agency heads and funders. Simply put, they illustrate differences in thinking. To be sure, not all grantee professionals or all funders are of the same view. In certain instances, some on the funding side disagreed with others in the same camp about what is reasonable behavior by grantees. Similarly, grantees were not uniform in their evaluation of funders' demands (e.g., the value of detailed reporting on grant outputs). The goal of this report is to encourage conversation around the issues raised, not to shut off such conversation or assume that all truth resides with critics or their funders.[5]

The report concludes with a number of reflections. One addresses the matter of context: viewed within the wider sphere of North American philanthropy, many of the criticisms offered by professionals at Jewish not-for-profits echo the grievances of their counterparts in the non-sectarian sectors. Placing the findings of this report into a broader context, it's possible to see generic patterns hardly unique to Jewish life, and to learn from efforts within the wider philanthropic sector to address shortcomings.

This leads to a second set of reflections about the importance of funder and grantee education. A number of organizations seek to educate funders in the wider philanthropic community about best practices. These educational program encourage more honest conversation with grantees. In some areas, such

[5] Interviewees also commented on variations in the approaches and expectations of funders based on variables such as gender; geographic region; the local culture of philanthropy; and sub-ethnic differences between Sephardi, Ashkenazi, Latino and Russian funders in the U.S., as well as differences in religious orientation (e.g. Haredi, Modern Orthodox, Conservative, Reform, secular). Though their observations were thoughtful, they are not included in this report because they are suggestive, rather than definitive. They are worthy of future research.

efforts may lead to altered policies on the part of funders. Similarly, professionals at not-for-profits could benefit from hearing their counterparts in the funding community speak about their frustrations with grantees, and their funding purposes and constraints. One does not have to assume naively that all tensions will be resolved simply by having more conversations. Better communication, however, has a chance of influencing the thinking of funders and grantees about ways to strengthen their relationships.

Finally, and perhaps most important, the aspiration driving this report is to convey to funders and grantees that some of their approaches are unhelpful. Excessive demands placed on grantee professionals—whether in the form of overly convoluted application processes or needlessly cumbersome reporting requirements—or personal interactions that deflate the morale of professionals are wasteful. And on the other side, some of the behavior of grantees designed to work around the mission of grantmakers or to bypass personnel when a firm 'no' has been given, is off-putting to their funders. If only for the sake of greater efficiency, improving relationships between funders and their grantees is a worthy endeavor.

The report includes a dozen findings with policy implications:

1. Reports from professionals at not-for-profits about positive experiences with funders provide useful lessons about good grantmaking. When the focus is not solely on the success or failure of a grantee to deliver on a program, but includes the lessons derived from those experiences, grantees feel they are being treated as partners in a learning process, not solely as service providers who are judged for their effectiveness.

2. Even as staffed foundations seek to approach grantmaking in a rational, evidence-based, instrumental fashion, interpersonal relationships still matter greatly. Unsurprisingly, many dozens of professionals at not-for-profits expressed appreciation for times when funders, especially at staffed foundations, respected their expertise and valued them as individuals.

3. Professionals at not-for-profits were most appreciative of foundation staff who played the difficult but important role of honest broker, navigating between their responsibilities to their boards and helping worthy not-for-profits frame their initiatives persuasively.

4. Navigating the funding sector is a serious challenge for many not-for-profits. Mid-sized and small grantee organizations lack the personnel to research which funders might be a good fit for their initiatives. A map or directory of foundations and funders that clarifies areas of interest could smooth the process for grantees to find the proper match.

5. Grant application forms and reporting instruments are perceived as overly burdensome and unnecessarily time-consuming because they differ from one funder to the next. It is not inconceivable that working together, parties on both sides of the philanthropic table might develop more efficient instruments.

6. Foundation staff are drawn from a range of backgrounds, but do not necessarily possess a clear understanding of the complexities of working with a Jewish population or the day-to-day requirements of keeping a not-for-profit afloat. Programs for professional training in grantmaking and education about Jewish communal needs could address gaps in knowledge and strengthen foundation staff as grantmakers.

7. Large foundations and not-for-profits tend to have sharply different agendas and expectations. The former measure their impact through the *change* they bring about. The latter are focused on their own sustainability as organizations, even as many also engage in change-making initiatives. These fundamental differences in core purpose create a large chasm, at times leading to disappointment on both sides. It's worth working on ways to bridge some of these gaps.

8. By dint of their wealth, large foundations are setting the Jewish communal agenda—at least on some issues. This reality has caused concern, if not resentment, particularly among professionals running organizations with a national scope. A healthy community would find ways to encourage more conversation between the philanthropic and not-for-profit sectors.

9. Currently, there is a vacuum in thought leadership and no central address where wider communal needs are discussed, let alone where new planning occurs in a comprehensive fashion.

10. Numerous interviews for this project, along with considerable testimony in other sources, make clear that the power imbalance between funders and professionals at not-for-profits leads *at times* to the ill-treatment of the latter by the former. It will take a concerted effort by funders, boards of not-for-profits and organizational policies to develop effective means of addressing the behavior of bad actors.

11. Federations raise funds but also act as grantmakers. Recipients of federation funding have raised concerns about the methods by which federations decide on grants, their grant application processes and their reporting requirements. As grantmakers, federations can benefit from the range of improvements other funders are instituting to aid their grantees and insure a smoother grantmaking process.

12. The broader philanthropic sector working with consulting organizations has developed tools to simplify application and reporting forms, programs to upgrade the professional skills of foundation staff members, mechanisms to reduce abusive and sexist treatment of professionals, and proposals to address the charged issues of overhead and capacity building. The Jewish philanthropic sector can draw upon these models of best practices as it rethinks its funding processes.

Report

Observers of North American Jews have come to recognize the profound transformation of communal life, including the funding sphere, over the past quarter century. The sub-title of a prior report I have written captures the most important new dynamic in the sphere of Jewish giving by drawing attention to *"How Big Funders Have Transformed American Jewish Philanthropy."* Jewish organizations rely inordinately upon the largesse and influence of big givers. This is as true for major local institutions, such as federations of Jewish philanthropy, Jewish Community Centers and synagogues, as it is for start-ups, regional programs, cultural institutions, national agencies and funding directed to Israeli causes. By contrast, during the second half of the 20th century, institutions relied upon a broader swathe of givers. Big gifts, of course, were crucial even then to sustain organizations, and so too was the legitimacy major donors provided to institutions.

Big givers also have shifted how they channel their largesse. As is true of North American philanthropy in general, foundations have grown in number at an explosive pace. Roughly 250 substantially endowed foundations with a significant interest in Jewish life have been established, mainly since the early years of the 21st century. Perhaps as many as half of these foundations now employ a staff of professionals to manage the day-to-day work under the supervision of a founding principal who established the foundation and/or a board of trustees. Most of these staffed foundations are guided by lay and professional leaders who regard their role as serving as agents of change and innovation. They focus on "instrumental giving" designed to achieve a social aim or address a systemic problem.

Staffed foundations tend to work on issues of national, if not international scope, even as some of their grants are directed to the local community/(ies) with which the funder and board identify. They can strive for a broader reach because of substantial assets in their coffers. With their ability to channel large resources, staffed foundations tend to have an appetite to address large issues. They generally prefer new solutions and favor innovation, rather than established agencies and institutions. Some foundations single-handedly, or in concert with others, create new initiatives they believe are necessary for the 21st century Jewish environment. Collectively, during the second decade of this century, staffed foundations channeled roughly one billion dollars *annually* to various North American and Israeli projects.

That figure is dwarfed by the collective giving of individual major donors. Channeling their grants through Donor Advised Funds, checking accounts, asset transfers or other instruments, and small family-run foundations, individual donors collectively give roughly five billion dollars in gifts annually. Some help support new initiatives and start-ups. As a general rule, however, their giving is meant to sustain the vast array of existing Jewish not-for-profits in North America and Israel. Much of their philanthropy might be described as "expressive giving," support for a cause or institution that resonates emotionally with funders. Through the sheer amount of dollars they donate collectively, individual donors serve as the mainstay of Jewish communal life, even as foundations tend to be the risk-taking sector committed to driving change.

Both types of funders—staffed foundations and individual big givers—support the diverse and rapidly expanding not-for-profit sphere of Jewish life. Relatively few not-for-profits can manage solely with dollars they raise through membership dues and service fees. Simply put, they are dependent upon philanthropists. To survive, they rely upon a cadre of funders. And that raises the question of how they perceive and experience their relationships with funders, the subject of this report.

The Grantee Perspective

It's a truism among funders and grantees that trust and transparency are vitally important for the flourishing of good philanthropy. Funders expect their grantees to report honestly about how their money is spent and the impact of their grants. Funders also demand transparency about the hits and misses as grants unfold—what has gone right or possibly awry. Grantees, for their part, expect givers to be straight with them about their funding priorities and expectations. Professionals at not-for-profits expect to learn from funders whether there is a realistic chance to obtain funding approval, especially with all the time they invest in writing ever-more extensive grant applications. Honest communication between funders and their grantees is the necessary lubricant to keep the mechanism of philanthropy operating smoothly.

But that is easier said than done given the power imbalance whereby funders are the deciders: they choose which projects and grantees are worthy of their support. By virtue of their control of money, they are in the driver's seat. Not-for-profits are considerably more dependent upon funders to sustain their efforts than *vice versa*. And though enlightened funders recognize how much their impact depends on the operational success of grantees (except when foundations become operators of programs), they vary widely in their willingness to view grantees as partners, rather than as sub-contractors whose task is to complete a particular project.

Even in the most cordial of relations, the imbalance of power makes it hard for grantees to speak directly—and critically—to funders, though the latter are considerably less inhibited about speaking their minds to grantees. As a recent report by the Center for Effective Philanthropy (CEP) notes, "Given the inherent power dynamic between grantmakers and grant seekers, it is challenging for funders to get candid feedback from grantees and grant applicants."[1] The reason for the lack of candor is self-evident: professionals at not-for-profits avoid saying anything to upset a funder because directness may imperil their funding. Even though good communication is vital in a philanthropic relationship, candor on the part of a professional at a not-for-profit may backfire and do serious harm to a grantee organization. The wrong word, let alone pushback, may prompt a funder to walk away. Controlling the money means never having to tolerate criticism or pushback; needing the funding often means biting one's tongue.[2]

A number of organizations survey professionals at not-for-profits and issue reports on their findings (without naming respondents) for the purpose of fostering communication from grantees back to their funders. On the national scene, CEP gives voice to anonymous professionals at not-for-profits through its surveys of grantees. Of course, funders are free to ignore the suggestions conveyed in these surveys. But the CEP persists because it believes that feedback from grantees is important for improving the philanthropic project. The rationale of the CEP is embedded in its name: Listen to what professionals at grantee organizations have to say because their perspectives may help you become a more effective philanthropist.

Nothing comparable to the CEP surveys exists for the field of Jewish philanthropy. That is why a number of major funders led by the Jewish Funders Network have sponsored this report on how professionals at Jewish not-for-profits experience and perceive their funders. The purpose of this report is neither to glorify funders and their considerable accomplishments nor to denigrate their efforts. It is designed, rather, to give voice to the views of professionals throughout North America who function as top executives at not-for-profits or head up what is called, often euphemistically, "resource development" or "donor relations."

To offer some balance, this report presents responses to particular points of criticism from the perspective of grantmakers. The purpose is neither to diminish the considered views of those on the grantee side, nor to rebut every concern they raise. Rather, some funder perspectives are included to illustrate differences in understanding the goals and practices of Jewish philanthropy. Those differences are especially pronounced when it comes to the mission of staffed foundations whose aspirations and constraints may not be well-understood by their grantees.

[1] Naomi Orenstein, "Grantee Voice: Nonprofit Suggestions for Funder Improvement." Center for Effective Philanthropy, January 31, 2019. https://cep.org/grantee-voice-nonprofit-suggestions-for-funder-improvement/

[2] Professionals at foundations contend that they receive, and are receptive to, pushback from grantees.

How Information Was Gathered and Is Presented

This report is based on views voiced by 140 Jewish professionals working in communities across the United States and Canada.[3] Interviewees were chosen with an eye to including the perspectives of professionals in large and intermediate size Jewish communities with experience working in local institutions, as well as national ones, and some with international reach. Collectively, these professionals have been situated in 20 states plus the District of Columbia, as well as three Canadian provinces. They have worked in 41 different cities and localities across North America.

Interviewees currently or recently served as executives/directors of development/major gifts officers at 25 federations of Jewish philanthropy, 13 local agencies, 12 local start-ups, 12 campus Hillels, 11 Jewish Community Centers (JCCs), 9 Orthodox outreach centers, 7 synagogues, 7 Jewish day schools, 8 senior health facilities, 6 residential summer camps, 11 so-called "friends of" organizations raising funds for Israeli institutions, and 30 national institutions (including educational and cultural centers, community relations organizations, youth programs and Israel-oriented trips, start-ups with national reach, and broad initiatives organized by major funders).[4] Though many of the interviewees solicit funds from all types of donors, *they were asked to comment on their higher-end givers.*[5]

To insure as much candor as possible, interviewees were promised that their observations would be used "on background" only. Nothing said during interviews is attributed to a named individual. To further preserve anonymity, no grantee organizations or funders are named in this report. The only place interviewees are listed, along with their affiliation at the time of the interview, is in the Acknowledgment section appended to this report. With few exceptions, almost all interviewees agreed to be thanked by name.

Each interview included an overarching question about the most and least positive experiences professionals had with donors. In a very few cases, interviewees declined to speak about negative experiences, either because they claimed not to have had any or because they felt it imprudent to give vent to them, even when promised anonymity. But the large majority of interviewees were eager to speak their minds and seemed to value the opportunity to do so when shielded by our confidentiality agreement.[6]

Much of what was said focused on the mechanics of applying for funding support, working with donors, reporting requirements and financial arrangements. But as the subject of this report is ultimately about complex human interactions, I heard a good deal about altruism and selfishness, warm personal friendships and abusive behavior, fruitful philanthropic partnerships and eccentric, if not destructive, demands. The range of experiences reported here is hardly surprising. When money and power are key ingredients, one could hardly expect otherwise. Both the positive and negative experiences related by interviewees hold important implications for how the field might improve its practices.

By design, this report focuses mainly on the experiences and perceptions of those who hold the weaker hand in the power relationship between funders and grantees. There is another side to some of what is recounted here, especially to the strongly voiced criticisms. I have endeavored to include that other side through interviews with top professional staff members at foundations and some individual funders. Beyond

[3] The interviews were conducted mainly between June 2018 and January 2019. A few were completed before or shortly after those dates.

[4] For a variety of reasons, the number of institutions represented does not precisely conform to the number of interviewees. In some cases, more than one individual was interviewed at a single institution. Also, because most professionals at not-for-profits have held jobs at more than one organization, it was not unusual for interviewees to compare their experiences at three, four or more Jewish institutions. These comparisons proved illuminating, providing rich information about a broad range of settings and important insights into regional variations.

[5] In *Giving Jewish*, I defined "big givers" as individuals or foundations disbursing a half million dollars or more *for Jewish causes annually*. For the purposes of this report, I could not employ the same definition. How can a grantee know whether a funder who gives by writing a check or via a Donor Advised Fund contributes a half million dollars or more annually to Jewish causes? Such information about individual donors is impossible to obtain, though it is available in public filings for foundations. Undoubtedly, some individuals described by interviewees fail to reach the half-million-dollar threshold. For that reason, I asked interviewees to focus on their higher-end funders, defined by me in interviews as five figure or higher donors. As will become evident as this report unfolds, some private individuals described here, though not named, gave seven, eight and even nine figure gifts—i.e. millions, tens of millions and hundreds of millions—to a single institution.

6 The advantages and drawbacks of such anonymous interviewing in the arena of philanthropy are discussed in Megan E. Tompkins-Stange, *Policy Patrons: Philanthropy, Education Reform and the Politics of Influence.* Cambridge, MA: Harvard University Press, 2016, pp. 8–10.

those excerpts[7], readers may wish to refer to *Giving Jewish*, a previous report, which viewed the scene primarily from the perspective of grantmakers. By contrast, the present study rests its gaze mainly on the perceptions of grantees, and less so on the outlook of funders.

Readers should note that this report is qualitative, not quantitative, in approach. Those looking for percentages and other numerical data will be disappointed. Though I have striven to cast a wide net to encompass a large number of communities in North America and many different types of not-for-profits, this report is not based on a random sample. Some interviewees came to my attention in conversation with their colleagues (forming thereby a snowball sample); a small number of voices are absent because they declined to be interviewed. Moreover, with 150 respondents, it hardly makes sense to quantify percentages of respondents who answered one way versus another. The compensating factor is that in speaking with individuals at length in interviews running on average for one hour, I was able to elicit views, probe for clarification and examples, and go down unplanned byways. By interviewing, I was able to capture the viewpoints of specific individuals in their own words and in greater depth. (As noted in the Acknowledgments, approximately 40 out of 150 interviews were conducted by a research assistant named Jackson Krule who ably provided me with extensive notes on his interviews. I conducted the rest of the interviews.)

What, then, do the views expressed here represent? Virtually every positive and critical perspective reported here recurred in numerous interviews. Though direct quotes are presented as the words of a specific interviewee, similar comments surfaced repeatedly. *It therefore would be a mistake to dismiss issues raised, especially of a critical nature, as idiosyncratic or unique to the speaker quoted.* The same observations were voiced in dozens of overlapping comments.

Finally, at the end of most sections, the report contains what are labeled as "Findings." These consist of what I have learned from the process of interviewing practitioners. I alone am responsible for formulating these "Findings." Others, undoubtedly, will read this report differently. If the report sparks conversation and disagreement, all the better.

[7] Responses by funders appear in sidebars lined with orange.

The Jewish Philanthropic Environment as Perceived by Grantees

From the perspective of professionals, especially those with long-term experience, working with funders has become more complicated in recent decades. For one thing, the explosion of not-for-profits with a Jewish mission has intensified competition for donor attention. A second development noted by interviewees is the privatization of philanthropy: One or two generations ago, giving to Jewish causes—to Federations or Israel—was treated as a Jewish "tax," an obligation, and donors vied with one another often in very public ways to contribute ever larger sums. In some settings, such as in southeast Florida where many wealthy snowbirds reside during the winter season, several fundraising events are held weekly, and the peer pressure to give remains strong. But much of Jewish giving elsewhere is done through foundations or Donor Advised Funds, which are less likely to face public exposure. When professional philanthropic advisors are used and/or staff members are the public face of foundations, it becomes much more difficult for professionals at Jewish not-for-profits to gain direct access to funders.

These new challenges have not daunted these not-for-profit professionals. Many of them remark upon the presence of people with considerable wealth in their communities or otherwise on their donor lists, including newly-minted billionaires. Based on their donor research and interaction with funders, they marvel at the vast means possessed by individual donors. One development officer at a Jewish Community Center commented on how within a half-mile radius of his institution, 30 Jewish billionaires reside, most of whom utilize his facility periodically. But then, sighing, he expressed exasperation that it's still so hard to raise money.

One source of this problem is the shrinking pool of funders interested in giving to specifically Jewish causes, especially as an older generation of donors departs the scene and younger ones are not replacing them as supporters of Jewish institutions. Professionals at Jewish not-for-profits also feel most comfortable working with older donors in their late 70s through 90s because these seem most likely to engage in emotional giving and to maintain warm personal relationships with professionals. By contrast, they find baby boomers much

more demanding of precise information on where their money is going and considerably less likely to trust organizations to spend wisely. Targeted giving is much preferred by the boomer generation and those funders who are even younger. When it comes to Gen Xers and Millennials, many professionals express concern about their interest in giving large gifts of any kind, let alone to Jewish causes.

Working in a communal environment where innovation and disruption are highly prized by funders, professionals at so-called "legacy organizations"—federations of Jewish philanthropy, long-standing Jewish community relations organizations, synagogues, JCCs, cultural institutions, campus centers, day schools, teen programs and summer camps—speak resentfully about the romance of funders with the "sexy" causes or "shiny, new things." On this matter, there is significant agreement between grantees and foundation personnel: the latter concede their job is to foster change and that generally occurs through funding for new initiatives. Some foundations, though, are receptive to working with legacy organizations, while others either operate their own programs or favor start-ups.[8]

Funding for new initiatives has brought a significant expansion in the number of Jewish not-for-profits. It is noteworthy that even professionals at start-ups expressed worry about the multiplicity of institutions soliciting funding support and the resulting stiff competition for dollars. This lament was accompanied by often-voiced concern about what many professionals label as "donor fatigue:" too much is asked of the same limited pool of donors; too many grantees turn again and again to the same wealthy people for support; and even those of considerable financial means tire of the constant solicitation.

Ironically, the trend to professionalize grantmaking is also perceived as a threat by professionals at Jewish institutions. Despite the increased emphasis on strategic giving—funding based on a declared set of goals to accomplish a defined objective and with the determination to measure the impact of programs—most professionals at Jewish not-for-profits continue to believe (and operate on) the assumption that philanthropy is built on establishing strong relationships with funders. It's not that they minimize the value of measuring impact and reporting on how money has been spent; most interviewees appreciate how thinking in these terms has helped improve the performance of their not-for-profits. But when it comes to soliciting or applying for funding, they emphasize the importance of human interactions. "People continue to give to people," a professional stated emphatically. And for the most part, that continues to be the guiding outlook of most professionals at not-for-profits.[9] Hence, they chafe at restrictions on their direct access to funders and foundation boards.

Not surprisingly, partisan political divisions in American society at large are taking a toll at Jewish not-for-profits. Just as some sectors of the wider society are consolidating into separate camps, often negating the legitimacy of their opponents' positions, similar patterns are at work within the Jewish community. Amidst the partisanship and divisive rhetoric, some wonder whether it makes sense to speak of *a* Jewish community. In particular, institutions with a broader communal mission—especially federations of Jewish philanthropy and JCCs—are besieged by funders demanding action in accordance with their own political views. Not-for-profits striving to represent the entire spectrum of Jewish communal life find themselves under powerful pressures to make public pronouncements about political matters that will alienate some constituents—an impossible position. At least a dozen interviewees cited unrelenting pressure from big givers who threatened to withhold their gifts to organizations that hosted a speaker who disagreed with their political views on domestic or Israeli policies. Some institutions have lost funders permanently because of their choice of speakers at public events. Jewish not-for-profits suffer because they neither can satisfy the contradictory political demands nor serve as a unifying force in Jewish communal life.

[8] *Giving Jewish*, op. cit., pp. 11-12.

[9] On the importance of personal relationships, there is a clear divide between foundation personnel and grantees. The former regard their efforts as rigorously professional and untainted by subjectivity; the latter are skeptical. That skepticism is certainly warranted in the case of foundations led by living funders who may regard funds allocated as "their" money. But even when the principal funder has departed the scene and boards set policy, they may be swayed by emotionally gripping proposals, especially those delivered in person.

Further complicating the task in recent years are widespread fears on all sides that favored social and political causes are under siege. Interviewees spoke of the shift in giving by big donors away from Jewish causes to support what they perceive to be embattled non-sectarian organizations such as Planned Parenthood or advocacy agencies that promote the donors' social concerns. The embrace of universal causes is spurred not only by political considerations, but a belief on the part of some donors that Jews as a group are sufficiently well-to-do and therefore are undeserving of financial support. Poverty among Jews does not register on the radar of many otherwise generous Jewish givers, and Jewish institutions are deemed less deserving of financial support than distressed people scattered around the globe. As one interviewee running a local social service start-up for Jews put it memorably and bitterly, "The children of major donors are more interested in sick animals than the Jewish causes of their parents and grandparents. They don't care about Jewish stuff."

Despite the challenges, every professional interviewed cited examples of positive experiences with funders. Everyone could easily describe warm partnerships with certain funders, the altruism and selfless giving of individuals, and the empathy displayed by funders at times of stress for a not-for-profit. Many spoke about how they have felt valued as individuals when funders invited them to family celebrations and holiday gatherings. Without any self-consciousness, some professionals doing development work described themselves as donor advisors, as helpers who inform funders about opportunities to do good.

Above all, professionals at not-for-profits went out of their way in almost every interview to acknowledge how satisfying it is to work with funders. To quote a long-serving communal professional: "The positives far outweigh the negatives; otherwise I would not have done this for the past 25 years." This professional is hardly unique in registering a sense of accomplishment and satisfaction. Individuals unsuited for this type of work have probably left the field.

Typical of many interviewees who freely acknowledged the complexity of relations with funders was the view expressed by the chief executive of a large national organization, who described the generosity of spirit encountered as "an astonishing thing. These are intelligent, caring people who give to the Jewish world. There is a very caring community of donors."

This overall assessment, with its emphasis on the personal, emotional investment of funders and their constructive help, should be kept in mind as readers come across sections of this report presenting more critical assessments.

Grantees' Observations about Staffed Foundations

Positive Experiences

To delve more deeply into funder/grantee relations, this report distinguishes between interactions with staffed foundations and individual major funders. Working with staffed foundations differs from soliciting grants from individual donors or even family foundations lacking professional personnel. Staff members, unlike individual donors, have considerable time to devote to learning about, working with and monitoring grantees. They also gather data on the short-term results of their grants to determine whether continued investments in specific programs are worthwhile in furthering the aims of the foundation and its learning.

Staffed foundations tend to set strategic objectives. They identify a systemic problem or social aim, and invest their money in a way that will have an impact. Usually, this involves developing logic models about how a challenge will be addressed, followed by a good deal of planning and evaluation of each initiative's success. All this requires staff members who play an active role in shaping proposals, regularly interacting with grantees, monitoring programs, reviewing reports on the impact of initiatives, and ultimately recommending additional courses of action to foundation boards and principals. Foundations also may turn to outside evaluators and consultants to help think through ways of having a greater impact. This is very different from the roles played by individual funders and family foundations. They generally see their giving as an act of support for institutions they deem valuable. Professionals who receive such support note that the amount of reporting they must provide to individual funders is far less extensive compared to what is expected by foundations. To be sure, increasing numbers of individual funders, especially of the boomer generation and younger, now require more intensive reporting, but, in general, working with foundations is considerably different from working with individual donors.

In addition to the many positive observations cited in the section above on what grantees value about their relationships with funders, specific points were made about experiences working with foundations. The head of a national educational effort, for example, spoke glowingly about her positive interactions with staff members at foundations: "There is a symbiotic relationship: we each benefit each other. They understand; I understand. They are invested in our success and we're invested in theirs." Spelling out what she means by this, the executive describes her most productive relationships as those in which grant applications are co-authored by foundation staff members who help shape the final product. The same point was repeated frequently: Professionals at not-for-profits appreciated the help of foundation staff members who proofread their pitches/applications and helped guide them in a different direction if they knew the board was looking for a particular emphasis or initiative.

Another professional lauded other types of aid she has received from foundation staff members. At various stages she has received calls from foundations "out-of-the-blue" asking, "Why don't you try this?" Rather than regard such calls as an imposition, she finds the suggestions "incredibly helpful," especially when they are based on the foundation's experiences with other grantees. The efforts of foundations to serve as "thought partners" are especially appreciated. With their "input," notes the head of development at a major Jewish cultural institution, "we have rethought some projects"—a process she considered highly constructive. Much good also comes when foundation personnel participate in the earliest stages of proposal planning. The most positive experiences cited by a development professional with experience in multiple educational organizations "came when a foundation tried to think along with the grantee about goals for programs, metrics for success and clearly defined expectations. The process of developing a grant proposal with a funder on board can lead to the funder bringing in outside consultants and helping even in the execution of the program."

It should hardly be surprising that grantees appreciate constructive help from foundation staff members. Such aid is in their self-interest. Professionals at not-for-profits spoke warmly about various forms of support they have received from foundation personnel. Overall, they expressed gratitude for foundation staff who were invested in their success and that of their funded programs. In some cases, they felt that some foundations also cared about their organization's long-term viability, treating them as an asset of the North American Jewish community, not merely as subcontractors responsible for completing a specific task. They lauded foundation principals and staff who took the time to visit and observe programs first-hand, who were eager to learn about new initiatives or were interested in the programs that would be housed in large capital projects.

Even stringent reporting requirements are seen by many grantees as a positive gain. When foundation staff ask tough questions and press grantees to measure their impact in a reasonable manner, not-for-profits professionals feel they are being encouraged to up their game. They learn from the reporting exercises. They value the opportunity to reflect on the successes and limitations of programs they have run because it helps them sharpen their focus and plan for next steps. In some instances, it provides them with data that will help them make more effective pitches to other funders.

The willingness of foundation staff to apprise their colleagues at other foundations of the good work of a not-for-profit was especially welcomed. The lead executive of a major national Jewish organization described the benefits as follows: "When a foundation supports us and knows us, at times it will talk about us to other funders. The collaboration between funders has meant that once a grantee has met the standard of excellence, doors may be opened to other foundations. It's like opening the club to others. If they're happy with you, they will open doors."[10]

[10] This type of vetting is a bit of a double-edged sword. Professionals whose agencies have benefitted from positive word of mouth are thrilled with the vetting and to know their names are on the lips of foundation personnel. Their counterparts at agencies not included in the "magic circle" are left frustrated and resentful.

> **A professional heading up donor relations** at a small local organization speaks glowingly about his relationship with foundation staff. He finds it considerably easier to work with them than with individual donors, particularly because in his experience "staffers serve as advocates for both the donor and the not-for-profit." He has received help from foundation staff for everything from project selection to the application process. In the case of a recent foundation grant awarded to his organization, the staff of the funder acted "like a coach and walked [his] people through the process." Once the foundation identified his organization as consonant with its mission, "the staff did everything to help us be successful."
>
> Foundation staff helped shape the most successful version of his grant application, to the point of suggesting a different choice of words when making the case. He analogized the experience to "getting to know secretaries at the boss' office." "People in this field love giving advice and guidance," he has found. And in his case, working with foundation staff has been an unalloyed positive experience. The director of development at a regional institution for young people expresses his deep respect for staff at foundations. He values their forthright response to his inquiries because they tell him clearly whether their foundation is interested in funding him. In his experience, staff know the priorities of their foundation and principal decision-maker(s). Foundation staff, in his experience, do not "want to be wasting time" by dangling the prospect of a grant that is unlikely to materialize. He finds staff members are "usually correct in their assumptions and are a great extension of the more senior decision-makers. They have their finger on the pulse."

Finding 1: Much can be learned from reports of not-for-profit professionals about positive experiences with funders. When the focus is not solely on the success or failure of a grantee to deliver on a program, but on the lessons to be derived from those experiences, grantees feel they are being treated as partners in a learning process, not solely as service providers who are judged for their effectiveness. This means that grantees are invited to learn together with the funder about what works well and what does not. It means funders may view the failure of a program as not inherently due to a poor performance by the not-for-profit, but as the result of a flawed dynamic in one particular locale.

Finding 2: Even as staffed foundations seek to approach grantmaking in a rational, evidence-based, instrumental fashion, interpersonal relationships still matter greatly. For one thing, the morale of key professionals is an important variable: when professionals are treated with respect, they perform better. In addition, though funders hold power by virtue of their purse, they need not-for-profits to serve as operators of programs (except when foundations become operating foundations). Dozens of professionals at not-for-profits expressed appreciation for times when funders, especially at staffed foundations, respected their expertise and valued them as individuals. To take just one example: a professional at an important educational organization lauded a foundation executive who took the time to take a long "getting to know each other" walk. That encounter set the tone for a relationship the grantee described as candid and highly constructive when future projects were discussed.

Finding 3: Professionals at not-for-profits were most appreciative of foundation staff who played the difficult but important role of honest broker. On the one hand, those staff are accountable to the foundation principal and board members. They must represent the mission set forth by those who lead the foundation. But on the other hand, some foundation staff members also see themselves as advocates for worthy grantees, explaining what a proposed initiative aims to accomplish and why the prospective grantee is well-suited to achieve success. In other words, foundation staff can help to "sell" an initiative. Obviously, they won't do that with all—or even most—proposals, but only with those they believe in. Though not privy to all the behind-the-scenes discussions, professionals at grantee organizations discerned when foundation staff played only the first role and when they acted as brokers.

Critiques of Foundation Operating Procedures

Interviewees also had much to say of a critical nature about working with foundations. We divide these critiques between those focused on operational matters and those focused on the purpose and impact of foundations. Many dozens of interviewees cited specific foundation policies that were, in their view, unreasonably burdensome or unhelpful. Such problems are not unique to the sphere of Jewish foundations. They tend to be the same ones raised by grantees of non-sectarian institutions surveyed by watchdog organizations. That, however, does not diminish their significance or obviate the need to address them if the Jewish philanthropic sphere is to become more effective.[11]

Under-Appreciated Time Constraints

A contentious issue raised repeatedly by interviewees is the vast amount of time their organizations are expected to invest when working with foundation staff. Interviewees felt that foundation personnel have little appreciation for the time constraints of not-for-profits staff. With lean budgets, not-for-profits must streamline their staffing and rely upon their employees to perform multiple tasks. The executive of a national organization put it this way: "Foundation staffers demand a good deal of time from grantee organizations because those staffers have more time on their hands." Personnel at not-for-profits don't have the same luxury. Adding to the demands placed on grantee agencies are what the same executive describes as "multiple layers of discussion that occur in order to keep foundation staffers up to speed. And there are multiple staff people who have to be dealt with at foundations." Numerous interviewees complained about the absence of a common grant application form among funders of Jewish causes. Noting the movement toward common forms in the non-sectarian philanthropic sector, interviewees chafed at the need to tailor every application to the idiosyncratic wishes of a foundation, and that includes different specifications for how grant budgets must be presented.

Time constraints figure into another consideration for grantees. A significant number of professionals at smaller not-for-profits made a point of stressing that they have decided to desist from applying for certain kinds of grants because it is just not worth the time and effort. Some foundations announce Requests for Proposals (RFPs) for grants up to $25,000 or in some cases $50,000, but provide no opportunity for organizations to speak with a foundation professional to learn whether an initiative fits the RFP guidelines. After several unsuccessful attempts to respond to such RFPs, and many hours wasted on writing proposals that went nowhere, numerous interviewees noted their decision to avoid playing in that arena any longer. The risk of failure is too great, and the wasted time is more than they are prepared to bear. Here's how a JCC director put it: "We realized in dealing with grantmaking organizations that we're competing with many others. If we don't have a prior relationship with a funder, we're just one out of many. Grantmakers may have biases or intentions about which they are not always open—for example we only give to entrepreneurs or we've already given to you.... Small grants come up on our radar but it's not worth it to us. We'd like to apply for some grants, but we don't have the time."

Unclear or Misleading Communications

Then there are the practical steps involved in securing funding, a process some interviewees described as "the dance." Given the significant time investment involved in writing grant applications, grantees try to ascertain whether their initiative stands a reasonable chance of winning foundation support. Some interviewees expressed appreciation for the guidance foundation staff members often offer, including clear signals that a given project stands no chance of being supported. Professionals claim they much prefer a straight rejection because it saves them the time it would cost to prepare a complete grant application and provides an opportunity to learn more about areas a foundation will and will not support and where its current priorities lie.

Problems arise when foundation staff convey confusing messages. A long-time communal professional related two frustrating experiences with foundation staff members that still rankled: In one instance, he worked with a foundation executive over an extended time period on a projected seven-figure gift for a capital project. During that time, his not-for-profit invested the equivalent of $100,000 in travel, personnel time, consultants, finance people, writers and designers. With all the back-and-forth, the grant application had to be rewritten

[11] This point will be explored in Concluding Reflections.

four or five times. At the insistence of the foundation, the application had to include a clear accounting of every board member at the not-for-profit and what that board person would contribute. It was also necessary to include the project's prior history and to spell out what would happen after the grant was completed. When the proposal finally came to the foundation's board, it was voted down. An effort to learn why it was rejected proved fruitless. No explanation was forthcoming. The grant application process in this case dragged on for two years.

In a second instance, provided by the same professional, a project was discussed over the course of a year-and-a-half with the principals of a foundation. Finally, six month after the application was submitted, the foundation sent a letter suggesting its willingness to consider a grant for roughly one-tenth of what was originally discussed. Then the foundation informed the organization that it would consider only two items in the proposal, not the entire proposal. Finally, the foundation informed the organization that it was not ready to make a decision at all for the foreseeable future. "What was the point of the exercise?" wondered the exasperated professional, especially in light of the relatively small grant sum involved.

These examples hardly exhaust the range of frustrating experiences cited by numerous interviewees at local and national not-for-profits. A federation executive places some of the blame on foundation principals "who jerk you around and then will use the professional of the foundation to say 'no.' They may enjoy the conversation but are really not interested in your project." Similarly, the long-time head of a "friends of" organization supporting an Israeli institution reported his experiences with "foundation staff who project a friendly and open attitude and ask a potential grantee to submit a proposal, communicate after some suspense time that there is no interest after all, and suggest submitting another proposal… and on and on." He especially recalled "one prominent foundation … which probably cost us hundreds of hours of staff time doing proposals which never went anywhere."

Other kinds of communications gaps also impede grantee effectiveness. The executive of a regional educational organization appreciates when foundations are upfront and make instructions clear, specifically when they list on their website a person whom applicants can call to ask questions. In her experience, though, some foundations make it extremely difficult to communicate with them. "It's important to be able to have a conversation with a program officer and it's helpful to know if your proposal is in line with what the donor is looking for.…It's helpful to know if we even have a shot." The lack of communication/follow-up is consistently the most difficult part of grant writing. "More often than not, my emails just get passed around from person to person. And on top of that, they'll expect things from you immediately." She's even been asked by foundations to submit reports with only a couple of hours' notice.

Also, inscrutable directions often fail to clarify how to make contact within a foundation. It's usually clear when dealing with an individual donor or a few family members who can explain the position of the funder. Ascertaining what a foundation requires is considerably more work, often necessitating what another interviewee described as "reconnaissance missions." Navigating a foundation is a daunting challenge for many professionals. It's not only a matter of uncertainty about the right program officer to contact, but how to engage the decision-makers. Interviewees expressed bafflement as to whether they will benefit or harm their chances if they reach beyond a program officer to contact the top executive or use their special connections to reach board members or even foundation principals. The fact that foundations differ so much from one another means that each case must be evaluated differently.

Finding 4: The sprawling funder sector complicates the task of not-for-profits seeking to find a potential match for their program/initiative. Mid-size and small not-for-profits are especially hard-pressed because they lack the personnel to research which funders take an interest in specific types of programs. A directory of funders interested in Jewish giving and the causes they support would smooth a difficult navigation process for grantees.

When **top executives of large foundations** were queried about their responses to such cases, the common retort was that grantees won't take 'no' for an answer. It's not that foundations are responding unclearly, they assert, but that not-for-profit professionals tend to react to a rejected grant application by immediately working to reframe the proposal to fit what they think the foundation is open to funding. One foundation professional described the process as follows:

"Potential grantees will come in and they're so busy trying to figure out how to get funding that they get themselves tied up in knots because they go this way, they go that way, but they're trying to pick up cues from me or from the foundation. I actually feel bad sometimes for them, because if they come in and they say, 'I'm here because I need x, y, and z,' that's very clear. [But other grantees] get all twisted. I hate watching it when they get all twisted [trying to come up with a project they think will fit our mission]. It's actually painful for me to watch. Even worse, a lot of times grantees come in with five different options. I once had a grantee give me 42 proposals in a box. They told me to go through the box and pick the ones that I thought might have potential. It's just not the way to do business."

Interestingly, another foundation professional saw things differently: "I've run not-for-profits. They shouldn't take 'no' for an answer. Their job is to try to get resources from wherever they can. And I would fully expect them to try to remake or tailor grant proposals. I have no problem with that at all."

While grantees feel put upon by delays in getting answers to their funding requests, foundation personnel have a different perspective. Here's how one foundation executive sees it: "It's probably to the advantage of the grantee because when there are delays, it's not a 'no,' and it probably means that the staff or others within the foundation culture are grappling with the issues. In my experience not responding to a grant application is a very rare phenomenon. A slow 'no' means there's some hope."

One of his counterparts at a different foundation explains: "I can't speak for all foundations, but we would never put a grant in front of our board when we know they're going to say 'no.' And we would never even work with a grantee to develop a grant that we were pretty sure was going to be a 'no' because it's a bad use of my staff's time, which is limited as well. But sometimes we're not sure. Otherwise we're not taking any risks or we're not pushing our board members to stretch. But some of the times they're going to see things differently than us.

"But you know, if you only want to bring a sure thing, then you're going to miss out on a lot of opportunities. We don't bring something to the board if we think there's a five percent chance of getting a 'yes.' But if there's only a 45 percent chance, do you want us not to bring the proposal to them?"

Foundation executives conceded that, even with the best of intentions, they can offer only limited transparency because foundation principals and board members aren't necessarily consistent and do not make funding decisions in a timely fashion. Foundation staff may only have limited access to the key board members. And that creates an awkwardness. "Very often," a foundation executive notes, "the principal who is going to make the go/no go decision is not accessible to the staff. The staff person is embarrassed to say or unable to say, 'Look, I won't see our principal for six months.' It's much easier to say we need first a letter of inquiry, then a proposal, then another proposal, because this person is not authorized to speak on behalf of the foundation. The moment the [foundation] professional says, 'I'm not authorized to speak on behalf of the foundation,' she or he loses credibility with the grantee."

When Grantees and Funders Are Out of Sync

When foundations, which pride themselves on their commitment to innovation, are criticized for rigidity, it is worth noting. The head of a day school, for example, asserted, "Foundations don't allow a lot of room for being outside the box." In her case, she felt shoe-horned into a professional education program for not-for-profit leaders sponsored by a foundation that made no allowance for the varied needs of such leaders, treating them as an undifferentiated mass. Or to take another example, a professional described a loan program for Jewish not-for-profits to help with capital projects. The program required matching grants exceeding a certain monetary threshold. The grantee raised the matching funds but not from gifts above the threshold—and therefore was disqualified. From the grantee perspective, a one-size-fits-all approach of some grant programs does not fit the reality of Jewish not-for-profits.

> In response, **funders** acknowledge they cannot tailor every program to the diverse needs of all not-for-profits. Difficulties also arise, they contend, when grantees may be too harried to read funding guidelines. In the case of the loan program, its very purpose was to create an incentive for grantees to attract larger gifts. The goal was not only to provide the loan but to help build the capacity of grantees organizations through their recruitment of new, higher-end donors. If nothing else, then, the loan program illustrates the obstacles in achieving effective communication.

Funding cycles also came in for criticism because the needs of not-for-profits are not timed to the deadlines set by foundations. For example, some funding programs aiding schools set their deadlines for the end of June and then letters of acceptance go out sometime later in the summer. But schools plan for the school year in the preceding winter or early spring. The head of development at a prominent start-up raises the same point in a more general way: "We have a plan now and then we have to go hunting for funders who might be ready when we are. It would be better if the funders would be more available and more flexible." She especially knows that when it comes to capacity building, the needs of institutions may not coincide with the formal funding schedule of a foundation, but this type of rigidity forces Jewish institutions to put off initiatives—or shelve them entirely.

The Fraught Issue of Grantee Overhead

A perennial sore spot among not-for-profit leaders concerns the unwillingness of many foundations to support overhead costs of their grantees. Foundations cover the costs of running a program, including the hiring of new personnel needed to manage an initiative. But many not-for-profit executives contend that this funding rarely covers the time of staff (including the top executive) who must oversee those personnel. What about the salaries of staff who develop ideas for new initiatives that result in grants? What about the costs of office rentals and electricity used by the personnel running funded programs grant?

Some foundations have moved toward including overhead costs,[12] but others have not. What is a not-for-profit to do? According to a blunt-spoken executive of a national organization, the response to this question is to play an unspoken game with overhead costs.

> There used to be a time when one could submit a line in an application for overhead [usually as a percentage of the project. That is no longer true in many cases.] Either we are forced in an unethical way to pad the numbers in order to cover our overhead, or they assume there is no overhead, or these foundations don't seem to believe in the mission of the grantees. It's the grantees' problem. The purpose is not to support the grantee, only the program. They throw the nonprofit under the bus. This is very frustrating, especially when it involves personnel who are needed to help support the project. Unless a foundation sees itself as a strategic partner—we believe in you as an organization—the grantee is seen as a program provider and therefore foundations ask, "Why are we paying for your overhead?" What they are unconcerned about is how the organization providing the program will survive.

[12] In September 2019, CEOs at five of the wealthiest American foundations announced their intention to "embark on a major campaign to encourage all other grantmakers to join them to help cover essential operating costs" at not-for-profits they support. See Maria Di Mento, "Five CEOs of Wealthy Foundations Pledge to Do More to Help Charities Pay Overhead," *Chronicle of Philanthropy*, Sept. 4, 2019. https://www.philanthropy.com/article/5-CEOs-of-Big-Foundations/247063/ This was followed one month later by a statement from the top executives of the two largest foundations supporting Jewish causes to issue a similar call. Lisa Eisen and Barry Finestone, "Raising Up Overhead: How We Can Do Better," *EJewish Philanthropy*, Oct. 7, 2019. https://ejewishphilanthropy.com/raising-up-overhead-how-we-can-do-better/

The subterfuge, in the view of this professional, is not healthy for a relationship requiring transparency. Another national executive zeroed in on the same issue, but pointed out an irony. Many foundations, he noted, don't appreciate the need for staff to plan and service grants. "The big guys don't support the overhead." So who does cover those costs? "Smaller donors give unrestricted funds which can be used for overhead."

Whether to support overhead varies greatly from one foundation to the next. Some foundations refuse to cover such expenses. Others not only do so, but will insist on the inclusion of overhead in the applicant's budget, if it is omitted from that applicant's grant proposal. There is no uniformity.

One foundation executive has expressed deep concern about the drift toward ever-more restricted funding: "I personally believe deeply in multi-year general operating and capacity building support as a key grantmaking philosophy, and one of my concerns is that I see too many of our colleagues going in the opposite direction toward restricted funding. I think it's really unhealthy for these grantees not to have more general operating grants. How are they going to function and keep the lights on if all they receive is restricted program grants?

"Our foundation does makes some restricted program grants. We do that if we're getting to know grantees for the first time or we are really only interested in a certain part of their agenda. But we would always build in some amount that would help them cover operating costs. I think it's problematic that there's a directional pull toward more restricted [funding], and not giving organizations and leaders the ability to plan, to pivot, to take risks, and to focus on the work rather than fundraising all the time."

One aspect of the overhead question elicited a strong response from a foundation executive who does cover reasonable overhead costs. "The thing that drives me batty as a funder," she asserts, occurs when "a fixed percentage is levied on a grant. Five percent, ten percent, or more comes off the top, a haircut, before the program is funded.... The reason we don't allow that is because it does not cost ten times more to solicit a $10 million grant than to solicit a $1 million donation."

Excessive Proposal and Reporting Requirements

As foundations have professionalized, they have required considerable amounts of paperwork at various stages, most notably the grant application itself, periodic progress reports and then a final accounting when the grant period has come to an end. Typical of many interviewees, a grant writer for a national educational organization described the process as burdensome: "Writing grant proposals takes a lot of time. Then there is the follow-up with foundation staff. Foundations send a few pages of questions that may require 30 hours or more of work. We pull all-nighters to complete them. But we can't drop everything else. Sometimes the questions are great. Sometimes they are not good questions. I'm under the impression that foundation staff send proposals to readers and then collect all their questions, which are then culled by program officers. The program officers need to answer to board members and evaluators. It's my impression that there are outside readers too."

Responding to grievances about burdensome requirements for large amounts of information at the grant proposal stage, a **foundation executive** offered his perspective: "I think some of [the grantees' complaints] are warranted. For foundations to make not-for-profits come up with a completely new budget for [each grant application to a different foundation] because that's the format the foundation likes is probably not a good use of anyone's time. But... if we can't present to our board—which does care about the numbers and is going to dig in—information that we can explain to them, that we can really own, and when they have questions on the budget, we can answer, it's just going to be a quick 'no,' and they're going to move on to the next item."

Once a grant has been approved, there are ongoing reporting requirements. No interviewee regarded such reporting as problematic in principle, and, as we have noted, quite a few felt they benefitted from the exercise. That said, many interviewees found the requirements excessive and unnecessarily burdensome. A staff member at a successful start-up baldly stated: "Reporting and grant application requirements are horrible. There's no consistency, no single form for reporting, no standard questions or budget format. Everything looks a little different." The lack of standardized reporting requirements was highlighted by the staff member as especially aggravating when a project receives collaborative support from a number of foundations. "Reporting is different for each one," she states. Like *many* others, she expressed her sense that a lot of the reports don't get read, especially by board members. Then there is the time-consuming preparation involved in writing these reports. Says another professional: "The amount of work needed for [completing] a grant report is often not budgeted for. The reporting requirements are not commensurate with the dollars actually granted."

Another controversial area in the reporting process is the overemphasis on quantitative measures of success. Particularly among interviewees whose work involved young people, education, and matters of identity formation, demands for quantification were not only resented but seen as short-sighted. Dozens of interviewees who work in the fields of education and culture voiced the same frustration about the emphasis on counting heads and measuring impact by an upswing in participants rather than the quality of the experience. Typical of such a lament was the perspective shared by an executive at a national educational organization: "Something that's incredibly frustrating is when funders take out their calculators and divide the dollar amount by number of participants. It's not taking the whole thing into account. We can't be measured by dollars per head." And yet they believe their programs are evaluated exactly that way.

> When allocating their limited resources, foundations have a responsibility to use the best available information to make a sophisticated cost-benefit decision, notes a **foundation executive** in response. Those decisions should take into account the likely impact and specific program goals. For example, it is more expensive to provide intensive and immersive programming than to sponsor occasional events or one-time gatherings; and presumably the immersive programming is more likely to generate greater change in the lives of participants. It would be silly to divide the dollars spent over the number of participants in programs with different degrees of intensiveness or to conclude that a one-time event is "better" because it is cheaper. Similarly, it makes more sense to invest deeply in individuals who wish to become communal or Jewish organizational leaders than in people without such ambitions because the leaders presumably will have a much wider influence. A cost-benefit analysis, properly applied—for example, to different teacher-training programs with similar levels of intensiveness and likely outcomes—is an important way of assessing which programs deserve funding.

Perhaps most galling to some not-for-profit professionals is the gap between funders' putative commitment to the ideal of learning together with grantees and the punitive responses of some foundations when a funded initiative does not result in the desired outcome. An executive at a national Jewish organization sharply criticized the practices of some foundations, noting that despite all the talk about how foundations provide the risk capital, in his view foundations tend to be quite conservative. They do not value failure as a necessary way for the field to learn. Rather, failure is not accepted, and in fact grantees are penalized for trying something new that that does not yield the anticipated results. This executive noted: "Many foundations don't accept that failure can lead to learning. The risk profile of funders tends to be the same. If something does not work, it bothers the funders, although to a different extent depending on the foundation. Risk capital is something that foundations pay lip service to." In some cases, his organization benefited from donor support for a particular program, and although that program did not work as expected, his organization learned a great deal from it. But the funder only focused on what did *not* work. "The headline was failure, not that the program yielded big learning."

Foundation personnel view reporting requirements differently. To begin with the purpose of reporting, a foundation executive said the following: "We're making an investment in an organization and its leadership. In return for that, we want to understand if that investment is paying off. And therefore, we need to know about some quantitative and qualitative outcomes. We ask, 'What is our investment doing and what are we learning about it?' We really view ourselves as partners with grantees, especially through some of the large investments that we're making. So, the reports are not in any way intended to be some kind of punitive [requirement] or policing. They're meant to ask, 'What are you learning? What kind of progress are you making? Do you have enough capacity to do what you're doing? Do you need to do any course-correcting?' We see it as a shared learning that we're doing together with grantees. It's not like, 'Report to us and then we'll decide whether we want to keep funding you,' but 'What are we learning and how are we making progress, and do we need to do anything to accelerate progress or to change course?'"

Another executive explained that her foundation does not require the same level of reporting from every grantee. The size of grants matters: "We say, 'Here are our reporting requirements', and they print off a page from their website and send it to us. We say, 'But you haven't answered our question. And we actually need to know how our money was used and we actually need to know what you've done.' And the response is 'these were the events that we had.' 'What is the impact?' we ask. 'We have lots of events,' they answer. But you know, for $500 maybe that's sufficient, but for $50,000, no!"

She added: "Sometimes as a funder, particularly when you look at organizations that might not have that many donors, I second-guess myself. Are we asking too much? And then I step back and say, 'No, this is actually quite reasonable, and I think this is really important. It's reasonable for us as a funder to know the impact of the funding that we're giving.' In fact, we're doing a service to our grantee to ask them to be self-reflective because it's healthy for them to think about what their impact is. Our reporting requirements are different based on the size of the grant. We're not going to ask for the same thing from an $1,800 grantee as a $180,000 and $18 million grantee. There's a different level of scrutiny. But reporting requirements are there for us to understand our investment."

From the perspective of foundation personnel, the demand for more sophisticated data gathering is not only necessary for the funder but also for the grantee. Another executive explains: "There's one grantee that we really pushed for measurement. Its executive director and I were fighting about measurement. He was saying, 'It works because we know it works.' And I was saying, 'You need to have evidence, and not only will the evidence be good for your theory of change and your outcomes and your funders; it will actually also help you, as an internal measurement tool for you, running your organization.' I add, 'When you need a course-correct, you'll actually find it really valuable. I know you think you're doing it for me, but you're actually doing it for yourself.' It was a very long, painful process. In the end, they got there. [The executive director] now constantly sends me emails saying, 'We cut the data this way, look what we learned. We did that, we did this.' They've moved 180 degrees.... He will say to me, 'You were right. I was resistant to the measurement thing, and now I just can't get enough of it. I love it. It's been so helpful, I'm so glad you pushed me on it."

Finding 5: Foundation staff and their counterparts at grantee organizations at times are at cross-purposes about the application and reporting processes. The former need information to make a compelling evidence-based case to their principals. The latter are often strapped for time and personnel who can invest the time in writing complex grant proposals and reports. There is no simple answer to this conundrum, but certainly efforts exist outside the Jewish philanthropic sector to develop generic grant applications and reporting instruments. To be sure, no one can force a foundation to utilize standardized forms. But it is not inconceivable that projects including parties on both sides of the philanthropic table might develop more efficient instruments. If they work for some non-sectarian foundations, why can't they work for those with a Jewish mission?

Mixed Experiences with Program Officers

In a previous section, we have noted the many appreciative remarks offered during interviews about the constructive roles played by foundation staff. But the same professionals also cited disappointing experiences with other foundation staff members. Here is a small sampling of the issues raised: A longtime communal professional: "Grants officers see themselves as gatekeepers and are not very helpful. They see themselves as in the know. They are not very open to learning and new input. They don't understand the field.... Most staff have the power to say 'no' and wield that.... They lack courtesy, not returning phone calls; days and weeks go by and they don't act with courtesy. This happens at low levels; the lower-ranking program officers are the least responsive." This interviewee claimed to have raised his concerns with top foundation executives and with funders. Some of the latter apologized, but others just shrugged their shoulders.

A professional with decades of experience working for federations and "friends of" organizations adds: "Good staff members at foundations will tell you honestly what will or won't fly. Others will say, 'Submit a proposal for what you think is important.' They don't reflect a desire to help you get funded. Eventually, you discover that the project never elicited any interest or support. This has to do with the ego of staff members. They want to be in charge, but that would mean they'll have to be the bad guy, so they encourage you to go forward. In some cases, they don't bother to interpret projects for boards or make the case on your behalf."

What especially rankles is the perception of more established professionals that young staff at foundations have little or no understanding of what life is like at a not-for-profit, where money needs to be raised to keep the work going. As one such professional put it: "Younger staffers have never run anything.... They are asked to do things they are woefully under-trained to do. Grantees have to appease younger staffers who have no experience running a not-for-profit. They should shadow a professional at a not-for-profit to see how the work gets done. Immerse them in the kinds of organizations they support. They don't understand the basics of balance sheets, leadership development and the work of the not-for-profits."

Added to this, professionals resent what they perceive as the unearned power young staff wield. The executive of a national organization described how the system works currently: "Longtime Jewish communal professionals in their fifties and older are beholden to a thirty-year-old, even though they might have a long-standing relationship with the principal funder." The empowerment of staff at mid-level positions leaves this executive dependent on their whims. Too often, he claims, foundation staff are not responsive to emails. "How does a grantee function with that?" He also cited an issue of younger staff who know far less about the field, but nonetheless question his professional decisions and play "gotcha" with his organization.

Perhaps the pithiest commentary on this issue came from a long-serving professional with decades of experience raising funds for domestic and Israeli institutions. "Sometimes," she said, "I can't believe someone is speaking to me this way." Referring specifically to young staff members at foundations, she went on to say: "They speak with self-importance and entitlement. They seem not to understand the difference between being the steward of funder money as opposed to acting like they are the funder. What comes across is arrogance. There is a haughtiness vibe suggesting that 'you don't know what you are talking about.'" She concludes by expressing her feeling of being "dismissed."

Foundation executives do not attempt to justify the arrogant behavior of some staff members. One freely conceded shortcomings among foundation staff: "There are two dynamics at work deserving of legitimate criticism. Number one, too many foundation professionals have no experience with what I'll call making a payroll, working in a nonprofit and having to deal with the realities of what it is to run a not-for-profit, such as the challenges of turning on the lights and making payroll. And so, there is no understanding and respect that goes along with it. The second dynamic, which is in my view much more dangerous, is the professional forgets that being adjacent to money and power doesn't necessarily give you legitimacy. Too often, those with money and

power start believing their own press releases. They believe that they know better, and along comes a 26-year-old young professional who, for whatever reason, lines up as the foundation person and has no relevant experience, but mimics the behavior of her or his principal. We know from psychology that identification with the aggressor is a very natural phenomenon. What needs to happen, both at the professional level and lay leadership level, is a lot more serious continued professional educations which call out these behaviors. It's not just so you can read a balance sheet; it's really looking at the culture of the foundation and how it relates to grantees."

Bad behavior cuts both ways, note foundation executives. One particularly irksome ploy occurs when grantees, as one such executive notes, "Try and get around the 'no' by calling other people at my foundation. If I'm saying 'no,' it's because I've cleared it with our CEO who has agreed to say 'no.' Don't try and go around me. Some grantees call others at the foundation, directors or other professionals. We talk to each other! I can't think of any instance where that happened where in fact, they were successful, but what it does do is leave a bad taste in our mouth. If you think about fundraising as playing the long game, we remember this."

Another foundation executive cites a different form of grantee bad behavior. He speaks of "an organization we've been supporting for let's say 10 years, generously supporting for 10 years. We've made a real, fundamental difference. That organization started going in a different direction. It's still doing good work. There's been no crisis. But foundations generally move on. And now when I see the executive director at some event in the Jewish community, I get the 'stare.' Where's the recognition? Why am I the bad guy because we stopped funding at some point? How about some appreciation, not for me, but for the 10 years of support from our foundation?"

Finding 6: Foundations have the advantage of being able to select from a wide range of bright job applications. Staff are drawn from a range of backgrounds but do not necessarily have a clear understanding of the complexities of working with a Jewish population or with the daily struggles of not-for-profits to meet their payrolls. They also do not necessarily know how to navigate between the demands of their foundation superiors—the principal funder and board members—and the needs of grantees. These deficiencies can be remedied through professional training programs. As noted below, models of such programs exist in the wider foundation sector and can be adapted by foundations with a Jewish mission. These include learning about best grantmaking practices, exposure to balance sheets and other budgeting instruments, serving as honest brokers between their foundation leaders and grantees; and they also include learning about the needs of the Jewish community and previous efforts to remedy challenges.

Critiques of Foundations' Purposes

In addition to the grievances about foundation practices, interviewees also raised questions about the overall approach of foundations, assumptions they make, and their impact on Jewish communal life. Some professionals widened the scope of their remarks to reflect not only on their own experiences, but also their perceptions of how foundations are shaping communal priorities. A few spoke about what they perceive as tendencies toward rigidity within foundations that militate against rocking the boat. To attend to the wishes of the principal funder and board of the foundation, staff don't seem to push back at approaches that seem of dubious value.

The Priorities of Staffed Foundations

Almost all staffed foundations identify a set number of funding areas, and within those they tend to favor agents of change and new initiatives. This approach is not without its critics. Some expressed concern about whether the funding areas favored by foundations necessarily are correctly chosen. On what basis, for example, has it been decided that Birthright Israel is worthy of an annual investment of $100 million, while other Israel programs of longer duration struggle to survive? As foundations pour vast sums into programs to engage unaffiliated millennials, some ask whether those on the margins should be prioritized over those who are more involved. Is there demonstrated evidence that service-learning programs have a greater impact on Jewish connection than do educational programs focused on more substantial Jewish

content and skills? And with all the focus on younger people, is the Jewish community living up to its ideals of honoring the elderly, or are they and poor Jews falling through the cracks? These are just some of the questions posed.

Here is how a professional at a national organization formulated these issues: There are "gaping holes in the Jewish community because there is no central planning in communities.... Where does that conversation about overall Jewish needs take place? We may be romanticizing the federations' past, but they seem to have paid attention to the broad range of needs in their communities. Recent news stories about the lack of funding for Holocaust survivors or the impoverished would have been inconceivable a few decades ago. Federations would not have let that happen in the past. Who is looking out for all of these needs?"

The foundations' "romance" with innovation has also come under criticism. Interviewees have questioned the widespread assumption that the long-established organizations of the Jewish community—synagogues, day schools, national agencies, summer camps—are all failing as is evidenced by their declining number of participants. While many staffed foundations have concluded that only innovative start-ups will attract today's Jews, some have asked: Where's the evidence of *their* impact and durability? Here is how one professional summed up this issue:

> The reigning notion amongst funders is that existing organizations "are not doing it well," so funders feel the need to reboot to try something new. This is the innovation argument, even though there is no evidence of the effectiveness of these innovative programs. Everyone's telling you to think outside the box; but what if your box is really the right box? The innovative mindset is also attractive because it empowers funders. They have the power and knowledge to earmark where their money goes.
>
> Some funders take the "good-to-great" approach and see the glass as half full. They want to build up what we already have. Others want to sweep everything away. In their view, nothing is working. These approaches have enormous implications for what gets funded. The personal worldview of the funder gets embodied in a funding approach. The personal agenda is presented as strategic.

Implicit is this analysis is a critically important assumption on the part of this interviewee and others: Funders have a responsibility to the Jewish collective. In response, some funders might say, "It's my money, and I have a perfect right to spend it as I see fit." From a legal point-of-view, they are correct. Their critics are not oblivious to this reality. But they question whether any of this is particularly good for the Jews. They examine funding priorities through the lens of their sense of overall needs. They also challenge the claim of grantmakers that their approach is strategic and based solely on a rational calculation. These critics ask: Where's the evidence for that? How scientifically based are funding priorities?

Of related concern to some interviewees is that staff are fundamentally accountable to their superiors—foundation principals and board members—rather than the wider Jewish community. Undoubtedly, these personnel would agree: indeed, they *are* accountable to their employer, and that's the reality of their employment. They probably would add that they see no dissonance between serving their employer and the collective needs of the Jewish community. Interviewees who value comprehensive community planning argue that foundation principals live a rarefied life, rarely encounter the so-called "Jewish street," and are far less connected to the reality of American Jewish life than even wealthy donors who engage with a wider range of Jews they meet around federation tables.

The lack of foundation accountability surfaced in a second way during some interviews. Foundations are not bashful about requiring their grantees to deliver on their proposals, measure their success, and report on their failings. Why is there no mechanism to hold foundations accountable for their decisions? On the most basic level of reporting, grantees must demonstrate that they are not using grant money in a wasteful fashion. "Is the overhead of foundations similarly monitored?" some interviewees asked.

Admittedly, these concerns can be dismissed easily because the only oversight of foundations is done either by the Internal Revenue Service, which requires an annual expenditure of at least five percent of the value of assets held by foundations (including overhead), or by board members internally. The question of foundation accountability is left hanging in the air, but preoccupies some communal professionals who take a broader view of North American Jewish life.

In the view of **foundation executives**, there is a widespread misunderstanding about the mission of staffed foundations. If foundations are to serve as the "passing gear" of philanthropy, as the chief investor in risky initiatives, they cannot tie up all their grant money in a fixed number of organizations. Without the freedom to move on from a grantee, the foundation won't be able to enact its role as a change agent, one that continually supports and experiments with new programs. The task of foundations is precisely to provide the risk capital for new initiatives, not for sustaining even the most successful of programs. Criticism portraying foundations as flighty, in short, is seen by foundation personnel as the product of an unrealistic expectation placed upon them.

A foundation executive observes a related misunderstanding about how foundations operate:

"A not-for-profit has a board of directors, and that board has signed up to be responsible for the financial wellbeing of that not-for-profit. We [as a foundation] didn't sign up for that mission. That's not our responsibility. Go ahead, do whatever you were doing yesterday, that's fine. As far as our board is concerned, we're in the business of sponsoring change. To the extent that we think your not-for-profit is capable of creating change that's aligned with our mission, we'll fund the delta needed to create that change."

The Relationship between Foundations and Grantee Organizations

"What is the responsibility of a foundation to its grantees?" is another question that agitates professionals at not-for-prof- its operating on the local and national levels. Interviewees spoke about their feelings of being used and then dropped by foundations after a grant period has come to an end. There are two dimensions to this critique. One of the most frequently voiced concerns was that some foundations seem to care only about the project a not-for-profit will run, but not the longer-term sustainability of the not-for-profit—and that very much includes start-ups nurtured at birth by foundations and then left to their own devices. Professionals at not-for-profits complain that their agencies are not treated as assets, but as purveyors of a service.

Some of the ill-feelings stems from the time-limited grants extended by many foundations. Why, they ask, are foundations inclined to award three- or five-year grants and then move on to other projects? The executive of a national educational organization refers to foundations as notorious sufferers of Attention Deficit/Hyper-Activity Disorder (ADHD) syndrome, flitting from one grantee to the next.

The second dimension concerns that lack of continuing support for programs foundations valued sufficiently to support when they were start-ups, but then "abandoned" after a few years. If the programs were deemed sufficiently compelling when a foundation funded it, grantee professionals ask, why do some foundations drop that program when they are not dissatisfied with its work and outputs? Why, interviewees ask, are start-ups not sustained if they were deemed valuable at their outset? The rabbi of a large synagogue who has raised considerable funds for capital and other purposes expresses frustration over the tendency of foundations to fund pilot programs, which is inadequate in his view because institutions can't change in three or fewer years. "They need to be a long-term partner in order to make changes." Foundations tend to think programmatically, he goes on to say. But programs are not an end; programs are part of the process. For him, the goal was to create a culture, which he feels foundations don't understand.

This is a gross generalization, of course. Some foundations most assuredly do offer sustained support to the same grantees over a long period of years. They help grantees develop capacity and plan for the future. Some introduce them to potential new funders. And in the foundations' view, they are helping grantees by not letting them become dependent solely on a single funder, knowing that an agency heavily dependent on a single funder is vulnerable if that funder cannot or will not support it in the future. As a **foundation executive** noted, "We're actually thinking about your own sustainability. We're thinking about rightsizing: if your largest donor gives $25,000, if we come in with a gift of fifty, what happens [to the grantee] if we don't renew? What is your sustainability? So, when we right-

size gifts... when we [make a smaller grant] than organizations might hope for... it has very much to do with our concern for their sustainability beyond our involvement. It's a responsibility of funders to ask themselves whether a grantee will be so dependent on them that if something were to happen to the funder," the grantee organization would not be able to sustain itself.

Also cited was the diminution of the human dimension when foundations are so focused on the instrumental. An executive at a highly successful start-up put it this way: "There's not a lot of empathy or curiosity about what happens [at not-for-profits] before or after meetings with funders. There's no gratitude or sense of partnership."

Ironically, the gradual emergence of collaborations between big funders in support of a project or not-for-profit also has come in for criticism both because of skepticism that such partnerships actually bring in more dollars and because they create much more work for grantee organizations. Here is how an executive at a national organization has experienced such funder collaboration: He describes the extra burden on grantees to herd diverse foundations to work together, something that is complicated because foundations differ in style. Often it becomes the responsibility of a grantee to find other funders so that the primary funder will not feel that it alone is supporting a project. He speaks of foundation collaborations in which principals of foundations support each other's causes, even though each of those principals has the wherewithal to fund the project alone. He underscores the complications such collaborations create for grantees who must prepare multiple reports, each one targeted to the predilections of a different funder. He also wonders whether these collaborations actually attract more money to the field. "Does it bring in new donors? Are foundations leveraging their dollars?"

The reluctance to think about the long-term needs of not-for-profits also was mentioned by numerous professionals, especially when they were questioned by foundation staff as to what will happen after the grant period ends, a question that is unanswerable in most cases. When the tables are turned and grantees ask why foundations are walking away from successful programs, "the foundation's response is that your organization will find other funders," states a long-time communal professional in summing up what he has heard innumerable times. "We are not here to run your organization. All we are doing is providing you with supplemental funds for a new project. Foundations don't want to engage around this issue, or if they do, they say we fund direct expenses in order for you to deliver your program.... The project, but not the organization, is valued. Foundations don't treat grantees as partners."

From the perspective of **foundation executives**, key differences in how foundations and not-for-profits think about funding stem from their very different fiscal circumstances. A foundation executive with experience on the other side of the table offered his take on the challenges facing not-for-profits. "It's very hard for directors of grant-seeking not-for-profits to think long-term. When our foundation decided to sunset, we went to each of the NGOs that we supported and said to them, 'Between now and when we go out of business, we're going to give you a total of a million dollars. You decide how you want to spread that over the next five years.'.... I thought people would say, 'Oh, we'll spend a few hundred thousand a year,' or, 'Give me $400,000 the first year, then $300,000. Start to taper off the grant,' or, 'Actually, have the grant go up so I can show other funders how my revenue is increasing.' To a person, they said, 'Give it to me over the next year or two.' They were unable to take a long-term view of their organization. The anxiety level that CEOs of grant-seeking nonprofits experience is profound. Many of them function without earned revenues and have to rely on grants for all of their money."

By contrast, this is how a foundation executive described the financial model of a foundation. "Typically, it works with a fixed budget. Let's say it's spending five percent of its capital every year and that goes up a little bit every year, but so does the cost of living. With inflation, let's say the foundation's actual buying power is pretty flat year-to-year. And this foundation is a good foundation, making multi-year grants for three to five years, which is what everyone wants it to do. But if the foundation aims to do something new, the only way is for it to stop

renewing older grants. The field can't have it both ways. You can't say, 'Hey, we have ideas for new initiatives or we want larger grants from you. You were giving us a quarter million dollars last year, we've really grown. We want you to consider half a million dollars a year.' Ninety percent of foundations probably can't do that unless they stop renewing existing grants. Now, a different discussion is whether they should only be giving away five percent. Even then, there's only a finite amount of money, just a higher spend rate. These are interesting discussions. But generally speaking, these issues are not in the purview of foundation staff."

And finally, a word of advice from foundation staff to not-for-profits: "If we're going to be colleagues with professionals at [grantee organizations], which is, I think, how we all view ourselves both from a collegial perspective and also just from a practical perspective (if you want to know how to get more money out of foundations), it's probably a good idea to understand how they really work and how the decision-making really works. And if you want to be treated with respect and empathy, so do the people on the other side of the [table]."

Finding 7: Large foundations and not-for-profits tend to have sharply different agendas and expectations. The former measure their impact through the *change* they bring about. The latter are focused on their own sustainability as organizations, even as many also engage in change initiatives. Indeed, large foundations tend to interact with and support not-for-profits when the latter are operating new initiatives offering the promise of change. Still, these fundamental differences in purpose create a large chasm—and at times lead to disappointment on both sides. The question is how to work with the dissonant expectations, rather than imagine either side will abandon its ultimate concerns. Candid conversations highlighting those differences in purpose and responsibility should serve as a starting point, though talk alone will not resolve the tensions.

Finding 8: By dint of their wealth, large foundations are setting the agenda—at least on some issues. This reality has caused concern, if not resentment, particularly among professionals running organizations with a national scope. The fact that some of the largest foundations are working cooperatively on some projects only adds to concerns that the community is being bulldozed to embrace specific projects while ignoring other worthy ones. Even worse, according to some observers, funders are sponsoring research "to demonstrate that their pet programs work," as one professional reflecting a more widespread view has noted. "They're pushing their agenda, but who knows whether in fact those programs are having the impact claimed? This is especially the case when funders sponsor research about their own programs.... Who determines the needs of the community? Major funders decide on what to invest in and then push the agenda onto the entire community." A healthy community would create opportunities for a full airing of these issues.

Finding 9: All this naturally leads to a discussion about the gaps in funding, because no functional body is concerned with addressing the overarching needs of the Jewish community. Instead, the agenda is often set by individual foundations with deep pockets, but that agenda is limited in almost all cases to one or two key areas of concern—the Jewish identity of millennials, the education of Jewish children, strengthening ties between American Jews and Israel, including Jews with disabilities or other marginalized sub-populations of Jews, etc. But what about Jewish poverty, the needs of the elderly, or the enhancement of Jewish cultural life, to take but three examples? A prominent professional at a national organization did not mince words about this issue, contending that "there's a lack of commitment to understanding the Jewish community. Fewer people are thinking globally about the connectivity between Jewish people. They don't see the need to invest in institutions.... Most funders are not concerned about taking money away from core needs of what makes for community."

The federation system once aspired to serve as the "central address," and some federations still strive to address all local Jewish needs. But the broader national, let alone North American ones, are neither the subject of comprehensive review, nor concerted action, perhaps because the federation system lacks the financial resources and legitimacy. A group of federation and foundation executives calling themselves the Tarrytown Group has had the potential to play such a role at its meetings over the past decade. But to date it has produced only one important initiative, Leading Edge, a program to "onboard new CEOs, strengthen partnerships between lay leaders and professionals, and help to create leading places to work" in the Jewish community.[13] Currently, there is a vacuum in thought leadership and no central address where the wider communal needs are discussed, let alone where new planning occurs in a comprehensive fashion.

[13] https://leadingedge.org/

Working with Individual Donors and Their Families

The Good

Even as staffed foundations play a considerably larger role in Jewish philanthropy today than they did at the close of the 20th century by making annual grants in the vicinity of a billion dollars a year, individual big givers[14] continue to be the dominant sustainers of Jewish institutional life. Collectively, the latter donate several billion dollars through Donor Advised Funds and other funding vehicles to Jewish causes.[15] More than in the past, almost all Jewish institutions depend upon the financial largesse of a relatively small base of significant givers to support their operations. Unrestricted giving pays for overhead and program support at most Not-for-profits. This reality alone would account for the heavy investment of time by professionals at not-for-profits in cultivating big givers. But there also is a second reason: not-for-profit professionals much prefer to develop a relationship with funders, something harder to do with more impersonal, business-like foundations.

Interviewing 140 such professionals, it's hard to miss their conviction that the key to raising funds is building human relationships with donors. "People give to people," remains the operative assumption of the Jewish not-for-profit modus operandi. This attitude was noted earlier in this report in the context of a discussion about grantee relationships with foundations, and it is even more pronounced among grantees seeking funding from individual donors. Just how important it is to build personal relationships was driven home by the head of a Jewish educational institution who related his experience with a particular donor family: When his institution required a sum exceeding a million dollars to refurbish a space, he turned to a couple with whom he had a long history, and they agreed to write a check to cover the entire cost.

But when the time came to open the new facility, the family showed no interest in attending the inaugural event. The funders gave a gift to the president because of their personal feelings for *him*. They apparently had scant interest in his institution. Though an extreme case, it illustrates the value individual donors place on personal relationships, especially with the top executive of a not-for-profit.

A federation development head put this in terms of donor-relations 101 dicta: "Fundraising at its core is all about relationships." "Seven touch-points per year is the idea," meaning development personnel minimally should create that many opportunities annually to interact with major funders. This may include writing many personal handwritten notes or, for those donors who prefer electronic communication, regular emails. It may include periodic updates on projects in writing or through phone conversations. If possible, development personnel prefer some face-to-face conversations. Even lapsed donors are contacted to keep connections alive. Whenever donors are receptive, they welcome site visits, which offer the best opportunity for funders to see their money at work and draw funders closer and deepen relationships.

It will come as no surprise that professionals delight in meeting new donors, enjoy developing personal relationships with them and their families, and regard the long-term cultivation of "prospects" as the key to their success. Professionals are not shy about their persuasive prowess. If they manage to gain entrée for a face-to-face meeting, they claim the ability to convince funders to increase their giving substantially. Several interviewees offered examples of how they were able to move funders from giving what likely would have been a five-figure gift into a seven-figure one, just by using their powers of persuasion. Speaking for many of her counterparts, a professional at a local not-for-profit asserted about her higher-end donors, "The more I work with them, the more I can engage them on certain things." Development professionals ascribe their success to solid preparation, including gathering information on donors combined with "the human touch."

They build human connection with funders by taking an interest in their personal lives. This means cultivating a relationship with several generations of a donor family and attending to donors at times of family celebrations and in painful times. Based on the reporting of interviewees,

[14] In this section, I collapse differences between individual givers, family donations and even small family foundations because all tend to make their decisions without involving professional staff, although some may, on occasion, turn to philanthropic advisors. Many, perhaps all, foundation principals also make separate donations apart from their foundation grants to support their local federation, synagogues and other valued institutions.

[15] For more on these dollar figures, see *Giving Jewish*, op. cit., pp. 16-18.

development professionals become confidants of their funders at times. This also means that giving by many individual funders is tied to a strong connection with specific professionals, a circumstance that can, in some instances, lead to less-than-professional interactions and blurred boundaries, as discussed in more depth below.

To be sure, there are also many funders who take an interest in particular institutions because they resonate in a deeply personal way with its mission. Several federation executives in locales around North America spoke of funders who covered shortfalls during the Great Recession so that services would not have to be cut at federation-supported agencies. Professionals at local institutions marveled at their good fortune when an individual who had no prior relationship with them fell in love with the mission of their not-for-profit and made multi-million-dollar gifts. Many spoke of the modesty of some large givers, who refused to have their name put on a building, even though the family gave the lead gift. Others related examples of donors who wanted no public acknowledgement of their gift. One particularly gracious gesture reported by a development professional concerned a funder who has given over 30 million dollars to a major cultural institution and then thanked *the institution* for giving him the opportunity to do a good deed. He didn't want to be thanked. Other individuals go beyond giving their own gift and actually solicit people in their own social circle or introduce development professionals to their social peers. The generosity of spirit and selflessness they have encountered moved many interviewees.

And then there were the funders who bothered to ask the professional some variation of the question: "What does your institution need and how can I be helpful?" The attractiveness of such a donor hardly needs explanation. But it attests to the commitment some funders have to specific institutions—their synagogue(s), a day school or summer camp, facilities for seniors or national institutions and agencies. Rather than situate professionals in the role of solicitor, some funders act as partners. It was surprising how many interviewees described experiences with this type of funder. Some donors go even further by paying off their multi-year pledges well in advance, a further act of generosity of great help to not-for-profits.

What also comes across is the diffidence some funders bring to the relationship. Some will acknowledge their own lack of expertise and defer to communal professionals. A professional told the story of a high-level funder who offered a suggestion. When the professional enthusiastically called it a "great idea," the funder asked whether the professional responded so positively because her idea truly was worthwhile or only because she is rich: "You have your expertise and I only have my wealth," the funder observed ruefully. That admission probably goes too far and doesn't acknowledge the wisdom accumulated over a lifetime by funders, but a degree of modesty on the part of funders and recognition of how much more expertise professionals have acquired over their careers can make for a respectful and fruitful relationship.

The Not-So-Good

There is another side to this story, though. Interactions can be fraught with tension for grantees. Several professionals have noted their high anxiety levels when they walk into a room for a meeting about philanthropy and have no idea what interests a funder (an experience they also dread when meeting with foundation personnel). But even when an understanding has been reached, funders can be fickle. Some refuse to put their pledges in writing. Others withhold payment until the last possible moment, leaving agencies uncertain whether money they have budgeted will appear as promised. Others suddenly cease to communicate after a long period of active engagement with a professional.

And then there is the uncertainty about what will or will not strike a funder's fancy at any particular moment. One of the more amusing vignettes provided by an interviewee revolved around his anxiety over the unpredictability of a major donor. Meeting in his office with a prospective donor who played a major role in her family foundation, he worried about her reaction to the dilapidated condition of the space. The funder, in fact, noticed the peeling paint and stained walls, but took him by surprise when she pronounced, "It's reassuring that the walls look crappy." She was happy that the not-for-profit was not spending her money on "superfluous" things. The professional had prepared a whole pitch and practiced it for a long time, but in the end it came down to something he hadn't even anticipated. Even more remarkable to him, something he thought would alienate a funder was actually viewed in a positive light.

The unpredictability of funder reactions is a reality that agency professionals have come to accept. More off-putting to grantees are the conditions attached by some funders to their gifts. Perhaps most common are the donors who expect a certain level of public recognition, such as the placement of naming plaques in prominent places around or on a building. Interviewees did not regard the desire of funders to be recognized as solely a matter of ego. In some cases, funders want their names on buildings as a means of communicating to their children and grandchildren lessons about their own values and Jewish civic responsibility, so that the next generations will aspire to do the same. But donors who demand that such plaques must be of a certain size or situated in multiple places puts organizations into an impossible bind when they deal with other donors.

Donors also may seek to be honored in very public ways at gatherings. And they attach conditions as to how their money must be spent. Philanthropy has worked this way for a long time, and not-for-profits are used to accommodating these kinds of expectations.[16] But some funders go further, using their leverage to wield excessive power, to push institutions in directions not consonant with their missions. In the large majority of cases, interviewees report that funder demands can be modified through reason and diplomatically-framed pushback. In a minority of cases, the transaction can take an ugly turn. It is the lot of professionals at not-for-profits to cope with the range of behaviors, creating a situation for some that was described by a professional as occasionally akin to "riding a bull."[17]

Boundary Issues

A frequently voiced lament, especially by the top executive of agencies, is that some donors don't respect professionals' time constraints. One way this manifests is through delaying tactics designed to defer decision-making about a potential grant. A federation executive described a funder who routinely dangles the prospect of large gifts in order to get attention. The executive also noted just how much time he must devote to courting a particular billionaire in his community. In this executive's view, the funder thrives on the "courtship." Similarly, the head of a local start-up spoke of the emotional neediness of individual donors: "Some donors just want to talk because they're lonely. Conversations meander off topic and staff people are afraid to rein in the funders. They want company to talk about their families and private matters, and they use their donations to purchase the time of professionals at not-for-profits." To be sure, development personnel wish to make personal connections with funders, and, as we have noted, view such relationships as the path to winning larger grants. But difficulties arise when the demands on their time are excessive and all boundaries between professional and private life are effaced. For this reason, professionals speak about how they are careful about sharing personal information, even as some funders burden them with "too much information."

Encapsulating the feedback he wished he could convey to funders, but does not dare express, an executive fantasizes his wish list: "I want them to answer faster. Don't string us out; don't say 'maybe' six times when you have no intention of giving to us. Don't ask for more proposals. We have limited resources. If you care about our cause, don't make somebody working on your cause waste resources."

To this we might add the lament of professionals about funders who waste their time in other ways, such as dreaming up their own initiatives and then expecting the not-for-profit to sell it to *other funders*. An organizational executive noted her frustration when funders come to her with big ideas but no serious interest in committing their own money toward what they envision. She called it "death by 'you should.'"

Executives of local institutions encounter a special set of boundary challenges, as their donors are also consumers. At JCCs, day schools or synagogues—among other examples—lines get blurred when funders demand special treatment, a not-infrequent occurrence. The director of a medical facility recounted how a major donor insisted that his wife be taken for a non-urgent medical procedure immediately, despite the waiting list for this service. The request was transmitted as an uncompromising demand: "Do it now or I will renege on my large pledge." JCC directors recount how they have received

[16] There are times when certain types of demands for recognition cannot be honored because an untenable precedent would be set. For example, an institutional executive described how an individual insisted on *numerous* signs in a building to recognize his gift. He sent a lawyer's letter threatening to withhold funds and, in the end, took back a quarter of his million-dollar gift.

[17] The analogy was drawn by a seasoned professional as a general statement about what it's like to raise money from mercurial or capricious funders.

last-minute requests for premium seats at a performance that had sold out long ago: "I want six tickets in row D, center aisle or you can kiss my gift goodbye."

Some funders also generalize from the experience of a family member and demand swift action to correct what they perceive to be ill-treatment. Day schools encounter parents who have given large gifts and demand a teacher's firing because of their child's particular experience with that educator. Or when something did not work out perfectly at a JCC program, big givers demand immediate change. One JCC director instructs her board members to "take off your donor hat and put on your executive committee hat. You have to think like a board member, even though you also may be a parent or member." It's not easy to separate roles when a major funder is also a participant in or recipient of an organization's programs and services.

Different boundary issues arise from some funders' belief that they know better than professionals solely by virtue of being rich and successful in their careers. An executive of a major international organization spoke of the overconfidence of some funders and their unwillingness to listen and learn. "They want to believe that they have the expertise to know better. 'I'm an expert too, and you should do it my way.' This rigidity may come from a sense that 'I built a big business; I know how the world works.'"

One manifestation of such overconfidence comes in the form of demands for ever-more data, which, in the view of professionals, do not really measure what works and what doesn't. A wide range of interviewees commented on how past big givers who had relied on informal communication now require a formal application and reporting process before they will renew their giving. In the view of some interviewees, this trend has picked up momentum across age groups in recent years. Donors are much more concerned about making an impact with every dollar they spend, and therefore demand more and more reports containing metrics and measures. In most cases, grantees do not object to requests for measurement of outputs. What they object to is the insistence on increasingly more burdensome forms of measurement, much of it irrelevant from the grantees' perspective. A professional at a local social service agency expressed frustration with what she perceives as the mindlessness of some of these demands by humorously describing some funders as operating in a fashion akin to playing Marco Polo, a children's game in which a designated player swims around a pool with eyes closed to tag another player, and the only information available is the sound of "Polo" uttered by other players in response to the shout "Marco" from the person who is "it." The image suggests that some donors thrash about somewhat blindly, but in the process constantly demand more information, often in response to new questions generated by family members or friends who may not be familiar with the particular program supported by that funder.

Grantees don't view these demands as constructive. Gathering vast quantities of data consumes a great deal of staff time that could be spent more productively. It also undermines morale when the expertise of long-time professionals is not valued. One development professional at a major national organization drew a comparison between how funders making gifts to universities tend to have great respect for the expertise of professionals, but when it comes to giving to Jewish organizations, there are funders who feel that they have more standing and more of an emotional stake in that kind of giving. She notes: "Funders feel they know and have expertise to tinker with ideas and programs at Jewish organizations. They are Jews who, after all, care about Israel, for example—so they think they know what to do. The funder of a research project at a university doesn't see himself or herself as an expert on the subjects of research. But when it comes to discussions of the Jewish future, Jewish projects, or the needs of the Jewish people, some funders believe that they know better" simply by virtue of being Jewish.

Professionals at not-for-profits have not only steeped themselves in the work of their organization, they also draw upon first-hand encounters with their program participants. Some individual funders seem oblivious of their own distance from realities on the ground: "People with money are often removed from the lives and experiences of people we serve. They are far removed from the actual problems," notes the head of a local social services agency.

The experience of an **executive at a Jewish not-for-profit** illustrates how dealing with individual funders can be a roller-coaster ride. The most nerve-wracking experience he mentions concerned a billionaire in his community. The donor pledged a multi-million dollar gift, though he refused to put anything in writing. Understandably, the professional was elated over the pledge, but then received a call out-of-the-blue from the donor's accountant saying, "I have to make this kind of call often. My client is withdrawing his gift commitment." Needless to say, a donor reneging on a gift of this size was a hard pill to swallow for the executive and his particular institution. Yet three months later, without any further communication about the matter, a lawyer representing the funder called to transfer assets valued at millions of dollars. Eventually, the same donor gave an additional eight-figure gift on top of the previous one. A few years later, this donor made an even larger commitment. After many meetings, the "donor for no apparent reason pulled the plug" on this extravagant commitment. When asked how he interpreted the billionaire's erratic behavior, the executive answered that the man "probably just wants attention because he's lonely, so he dangles large sums before grantees. He cares little about the impact his behavior will have on his reputation. He just wants attention." His game of making grand commitments followed by withholding is a way to garner attention.

By contrast, the same executive cites another donor family that lent its name to a major fundraising drive. To honor this family, a large gala netted an eight-figure sum. The family itself made a major commitment with a payout over a number of years. Eventually, the family prepaid the entire sum years before the final installment was due. Most Jewish not-for-profits would eagerly work with both kinds of donors, given the vast sums involved. But that hardly makes the effort to raise those sums less stressful.

Conditional Gifts

Many funders, understandably, are loath to write blank checks in the sense of letting others decide how their money will be used. An earlier generation of funders was more inclined than current ones to let professionals decide how to make the best use of a donation. They were far more trusting than current funders, in the view of long-time professionals who have worked in development. In our time, baby boomer and younger donors direct grantees on how their money may be used and place restrictions on where it should *not* be spent. From the funders' perspective, that's just part of due diligence.

But some funders go further and treat their funding as a transaction: "I'll give you these dollars if you do something for *me*." A JCC director relates that there's nothing subtle about the communication of these expectations. Funders are not shy about saying, "Because I'm giving you money, I expect you to treat me a certain way and give my family priority."

Many interviewees provided accounts of how their boards stood their ground in the face of unreasonable demands. The chief fundraiser for a day school capital campaign relates the story of a funder who intended to give a half-million dollars toward a construction project on the condition that he would have final approval for scholarships given to children in the school. He wanted to see the private scholarship applications, including information on family finances submitted by parents—something that had no bearing on the capital project. His gift was rejected. A number of JCC directors related instances when they turned away potential funders because their conditions would create a conflict between the interests of the individual donor and those of the community. In one case, a multi-million-dollar gift was rejected because it would have diverted the JCC from what it hoped to achieve. Despite the sizeable offer, the board's executive committee was in agreement that the offer "smelled wrong."

But there were also many examples of not-for-profits that could ill-afford to turn down a major gift. This resulted in boards capitulating to a major donor's wishes for total control over a capital project, or demands that an employee (including a CEO) be fired, or that the direction of a school be reversed. It's disheartening to listen to stories about employees fired without cause, solely to mollify a donor—or about funders given their way, despite the fact that those demands were not in the organization's best interests. And it's impossible not to sense the demoralization of professionals who felt they had little choice but to kowtow. Though boards and professionals have tried to resist the concerted power plays of major donors, some have concluded that for the sake of their institution they must relinquish their own authority—often with disastrous consequences, as shown in the following account.

The top executive at a local institution reflects on the risks of allowing a big funder to commandeer a project without strict oversight: An individual persuaded the board of a Jewish institution that he would personally contribute a multi-million-dollar lead gift to a capital project. When a feasibility study determined the size of a capital campaign the community could reasonably support, the funder expressed his conviction that more than triple that sum would be raised. The Board of the institution and its CEO gave the funder free rein to oversee the construction project. In due course, construction costs escalated, other donors walked away from their pledges, and the institution could not raise money to pay the salaries of its employees. Eventually, an outside foundation stepped in, restoring the confidence of donors. But all this came at a high cost: not one, but two CEOs were fired; several board chairs opted to walk away; an entire board was required to resign en masse; and the institution teetered on the brink of bankruptcy. Restoring the reputation of the institution and regaining the confidence of donors would require a concerted effort.

Though this case is extreme, it is not unusual for not-for-profits to encounter donors who pledge grants with strings attached. One executive described her own learning curve in discovering when and how to push back at inappropriate conditions set by donors. She has learned from hard experience that when donors come in convinced they are in charge and boards feel they cannot set limits on funders, an institution is in danger of alienating its core supporters and staff members. "The CEO and the board must understand their roles," she observed, "and take responsibility for creating boundaries." This may sound self-evident, but when institutions are struggling, it's not easy to say 'no' to a major donor, especially if there is a credible threat that the donor will renege on a pledge or cease supporting the institution.

Abusive Behavior and Sexual Harassment

When asked about their least positive experience with funders, a large proportion of interviewees related examples of abusive treatment they or their coworkers personally experienced. Misogynistic treatment of female professionals at Jewish not-for-profits was cited often by the women interviewed for this report, and by male colleagues who had heard about such incidents. In fact, the majority of interviewees cited sexual harassment as a hazard facing development personnel and other professionals whose job includes gifts solicitation. Male interviewees commented on the vulnerability of their female colleagues to harassment (and, while far more numerous examples of males harassing females were cited, there were a few references to female funders who had harassed male staff).

One development professional estimated that twenty percent of women in her field experience some kind of sexual innuendo or "objectification." She related that once a year, on average, a funder suggests she meet him privately after a fundraising event. In one instance, a donor offered the prospect of a cash gift if she met with him privately.

The most common examples related by interviewees involved inappropriate language directed at women, such as using terms of endearment or speaking to women as if they are children. A longtime federation executive described how some older, male funders relate to her as a granddaughter, calling her "honey" and "sweetie." A few women reported being asked to sit on a funder's lap or having a funder make unwanted physical contact, such as touching their hair or stroking their arm.

Reflecting her own experiences and that of counterparts at other institutions, a development professional at a highly successful start-up noted the absurd irony that some of her funders continue to "treat women like stupid girls," even though her nationally known institution is headed by a prominent woman. The head of development at a day school spoke about a funder who regularly tries to bully her, because, as she sees it, he cannot tolerate a woman in a position of power. Behind her back, he describes her to his peers as "just a shlepper, the worker bee"—though she has single-handedly raised many millions of dollars for the school.

This demeaning behavior, of course, communicates a lack of respect for female professionals. At times it takes a public

form. The female head of a Jewish day school recounted instances of her board chairman having to repeat what she said because the funder they were soliciting ignored her. "If the words do not come from a male, they won't be heard," she said. A male donor serving on a committee of her institution, she added, took the trouble "to check [into her personal life] and also felt the need to repeat what she said at meetings," presumably because "her say-so wasn't sufficient."

The insulting verbal behavior is bad enough; at times it translates into official guidelines. The head of a federation reports that some of her board members don't want staff members to take maternity leave, a policy she characterizes as "insulting and misogynistic"—and, we might add, antithetical to Jewish pro-natal teachings.

Particularly in the field of resource development, organizations have scrambled to protect their employees by forbidding a female staff member from going on her own to meet with a funder, insisting that women staff always are accompanied by a male when meeting with a donor, or, in some cases, simply not letting female development personnel meet with certain donors whose inappropriate behavior is well-known. Though intended to protect, these restrictions interfere with women's professional functioning while doing little to change the relevant dynamics and behaviors.

Interviewees of both genders were blunt about additional forms of abusive behavior they endure. The CEO of a JCC stated, "An awful lot of bullying is going on." The power imbalance leads some funders to feel they can behave as outrageously as they see fit with no consequences—and, regrettably, they are often right about that. One federation executive described a six-figure giver to his institution who screamed at a staff person, "You are useless; I will have your boss fire you," and indeed the employee was fired because the institution was reluctant to lose the funding. Outbursts of venomous anger and belittling comments are hardly unusual, especially among those "upper echelon donors" whose sense of entitlement, another executive relates, is overweening.

Though hardly the norm, this kind of behavior is not the odd aberration. The experience of a long-serving development professional who has worked for a number of local and national agencies illustrates what a number of his peers have to endure. One funder instructed him in no uncertain terms, "You will use the service entrance to my condo building." Another said, "You're nothing but a f.....g phone solicitor." Fortunately, this development professional did not hesitate to walk away from abusive funders, something not all professionals feel they can afford to do. His concluding observation is worth noting to understand the sense of entitlement manifested in those crude outbursts: "Some people are so wealthy that they think they are Jewish bluebloods. They came from poor backgrounds and now see themselves as royalty." That may describe the psychological reality, but does not capture the destructiveness of this behavior: when some funders behave abusively and in other ways cross boundaries, their actions sap morale. And that hardly makes for the smooth functioning of work with individual donors. Alas, as observed by an experienced development officer, it "is almost an unwritten rule in Jewish organizational life that unacceptable behavior has to be tolerated."

What Is to be Done about Misbehaving Funders?

The issue of sexual harassment and other forms of abusive treatment was framed by **a foundation executive** as requiring responses by individual leaders, organizational efforts and culture change. On the organization level, she contends, it's about leadership commitment, as well as training staff and board members about these issues. "Do you have a clear and articulated policy to prevent harassment and discrimination and to ensure people know what to do if something happens? We have found that the commitment becomes an anchor for a conversation that you can have with your board, with staff members, and even with vendors about expectations of the culture that you want to establish at your organization or foundation. Are we ever going to eliminate the individual harasser? No, but the goal that we see for the work is that we mitigate the risk of that kind of behavior when staff and boards know what to do and what to say and [when] people are trained and have the proper practices in place. [Eventually] that kind of behavior just becomes marginalized; it becomes unacceptable. A board commits to the proposition that 'this is not going to happen at our foundation or at our organization.'

"I think it is harder to address the individual funders, but if that kind of behavior becomes less acceptable in Jewish organizational culture, and if it's made clear we don't want folks on our board who are known harassers, people will feel more confident calling out somebody who's an individual funder for that kind of behavior when they know the organization is behind it.

"The risk factors for harassment and abuse stem from the disparity of power and so, I think, having more organizations that are women-led and where women have pay equity—if they have the same roles as men, they should get paid the same amount of money—will make a big difference. Where there's leadership distribution between men and women that is more equal, such an environment can mitigate the risk of this kind of thing going on. There's evidence in the broader field that places where there aren't power disparities have less harassment and abuse.

"We want to have a compelling field that attracts top talent, where people see this as a great place to work. But if, instead, our environments countenance abusive behavior, especially directed at women, what kind of talented people want to work under those conditions?"

A funder who runs his own business addresses donor misbehavior: "Funders are aware of the power dynamic: 'I have the money, you want money; you have nothing I want, other than perhaps recognition. There are plenty of places where I could give my money and you as the charity probably have fewer sources [of funding], especially if the number is big.'

"Funders are wealthy people, and wealthy people got wealthy by having a certain amount of aggression. Not all of them, but some of them. A lot of them respect a certain amount of pushback. They come from power, they look for power, they have respect for power. And if they see weakness, they continue to push. And if they don't see weakness, if they see strength, then they stop pushing—often, not always.

"Showing no strength is a big mistake. There's an appropriate amount of pushback. I come from the business world, not from the charitable world, and I find that if you go into a deal afraid to lose the deal, you will lose the deal. And so if a funder acts inappropriately, walk away. One of my beliefs is that no good business comes from bad people. And I think that no good donations come from truly bad people. We're seeing much more of that now. If you needed any proof, just look at what's going on today where people who perhaps you had a bad feeling about, [information about them] ultimately comes out, and then it reflects poorly on your institution.

"If your organization has a unique mission and you've convinced the donor that the mission itself is important, then you have a certain amount of leverage. The way people come [to support an organization] is by your selling them on the mission; and if they believe in the mission, then all of a sudden you have a certain amount of leverage."

A foundation executive with prior experience as a fundraiser for a federation addressed the issues of sexual harassment and bullying. She notes: "I've seen it; I've experienced it [during my years as a fundraiser], even if I wasn't personally the target.

"It's incumbent on the entire field, funders and grantees together, to look at this because it will only work if we all together say we're no longer going to condone this type of behavior. Bullying behavior becomes institutionalized. Is that the way we actually want to govern our organizations? If there were a paradigm shift that [such behavior] is no longer acceptable, it would take us a while to get there, but if we looked at that [collectively], we might be able to effect change at the systemic level."

More generally, "what has to happen is people are going to have to learn to say 'no' [to abusive donors]. And that's really hard. Instead of treating every case individually and leaving not-for-profits with a deep hole in their finances because they turned down a large gift from a donor who misbehaves, the Jewish philanthropic community should say, 'You don't want to be associated with [this donor] and we're going to make you whole because you shouldn't have to be short on your fundraising for standing up for what is the right.'"

As for funders asking for extravagant donor recognition, she tells of a federation board leader who insisted on remaining active with the federation's charitable gift acceptance committee for years on end. He felt it vitally necessary for the same message to be delivered to every single donor. That way, if donors insisted on having their name placed on a building for a two million-dollar gift rather than the three million dollars that was in the donor recognition policy, he could make it clear that not only would the committee not make an exception, he personally had declined other such gifts. The same rule is applied to every donor.

The point is not only that not-for-profits must maintain a consistent policy, but prominent lay people have a responsibility to address fellow donors about matters of equity and proper behavior. "What has to come into play are allies who say, 'Look dude, I'm not the professional; I'm a funder too, and this is not acceptable behavior.' Wealthy funders need to be partners in this endeavor. They might even say, 'I will feel better about supporting you if you say 'no' [to funders who are out-of-line] because what they're asking you to do is morally questionable.'"

Finding 10: Numerous interviews for this project, along with considerable testimony in other sources, make it clear that the power imbalance between funders and professionals at not-for-profits leads at times to the ill-treatment of the latter by the former. This report itemizes examples of sexual harassment and other forms of abusive speech and behavior. A concerted effort is needed on the part of other funders who must communicate to their peers that such behavior is unacceptable. Jewish organizations will need to set in place policies for reporting abuses and creating appropriate response mechanisms. It may require putting in place an ombudsperson responsible for addressing complaints. And it will require the wider funding community to help institutions become whole if they cut their ties with important funders who have acted inappropriately. Permitting the situation to continue is unethical, deeply demoralizing to employees at Jewish not-for-profits, inconsistent with community values, and a sure way to lose talented professionals.

The Special Case of Federations

The inclusion of voices from federations may puzzle some readers. Are federations not-for-profits or are they funders? They're not exactly similar to other grantees because most of the funding they attract is disbursed to agencies, start-ups and special initiatives operated *by others*. They are not exactly funders because, although they make grants, the money they disburse comes from the largesse of donors. Federations are primarily included in this report because collectively they field the largest staff of development professionals by far. These professionals have a great deal of experience working with funders of all types.

But what about federations as funders in their own right? Most local not-for-profits rely upon federation funding. Many start-ups depend on their local federation to keep them solvent. So how are federations evaluated by their grantees?

The short answer is that the reviews are mixed. Some grantees compare federations favorably to other funders, especially foundations. These grantees value the greater transparency of federations about their decision-making process. Whereas foundations are perceived as closed systems, federations are regarded as more open because laypeople from a range of backgrounds make communal decisions collectively and by consensus. Grantees also appreciate the in-service training federation staff have received about their responsibilities. Under the best of circumstances, federation grants are subject to published requirements, timetables, and transparent information about how grant applications are evaluated.

That said, some grantees working with federations express dismay about how decisions just seem to "happen," with no one really responsible for them because they are the product of a committee working by consensus. Accountability is left vague, at best. Moreover, grantees worry whether back-channel approaches to lay leaders in actuality lead to the granting of federation funding. Do you have to know a prominent lay donor to get in the door? If you haven't been a recipient of federation funding, how much of a chance do you have to receive a grant? This is especially the case with organizations that stand ideologically outside the communal consensus. Their leaders are dubious about getting a serious hearing.

What grantees also have found irksome about federations are some of the same grievances they raise about working with foundations. Recipients of federation grants feel the effort they must invest in preparing a proposal is not proportionate to the grant size. They also complain that reporting about grants to federations is needlessly cumbersome and lengthy. Grantees remark on the lack of flexibility on the part of federations as funders. "Foundations that give small grants understand their place in the pecking order. Federations see themselves as the big man on campus, even though many of their grants are actually quite small," contends a professional at a local agency. Illustrative of the mixed reviews are three sets of observations by local grantees:

> The executive of a local organization describes her relationship with the local federation as "good." She's appreciative of the federation's support of five percent of her organization's annual budget. She feels that "we have benefitted from partnering [with] and [receiving] training from [the federation]. But that help comes with conditions. [Federations] have a lot of guidelines and rules to follow. The have blackout periods when we can't fundraise, since it's their campaign period, lasting three months each year."
>
> Her board has voiced frustration on numerous occasions about how much they "hate that [our] organization is limited to nine months of fundraising and the benefit from the federation is so small. They feel the federation has too much power and gives so little." The federation also demands the right to approve all of her organization's "invitations and appeals." It sets sharp limits on the amount of money her not-for-profit may raise from any individual donor, even as it demands to see the list of her top donors. Yet she also says her organization would "be nothing without the federation."
>
> Despite the frustration she feels with the control exerted by the federation, she works on building a good relationship with professionals at the federation, and ultimately feels her organization receives more than it loses from the relationship.

The executive of a local social service agency in another city characterizes the federation as his "most challenging donor." Federation leaders "want the same amount of work each year, but their allocation is always different. They feel that they're giving us their money, so we should be held accountable." That attitude has not changed even though the federation's share of his organization's budget has sunk from 50 percent to 10 percent, "but they still think they have ownership." As a result, "there's a lot of tension with federation because its leaders feel they have ownership. They use us in promotional material and act like they own us. They get to play a stewardship role and help decide agency policy."

Another executive at a local not-for-profit declares, "I have only admiration for the work the federation does and the money it raises. It has the burden of being everyone's punching bag." In the larger scheme of his community, his organization receives only a small fraction of its annual budget from federation allocations, but he uses this to his advantage. He tells donors how little the federation gives and that motivates them because they appreciate the underdog status of his not-for-profit. He also benefits because of the small size of his organization which allows him to fly under the radar of the federation. "It has bigger fish to fry."

Finding 11: Federations are often criticized for focusing primarily on raising funds. "They only care about us as donors," is the popular refrain. That charge is refuted by the reality that federations are raising funds not to keep themselves afloat for the sake of institutional survival, but in order to allocate the moneys they raise to sustain and enrich Jewish life locally and abroad. What gets lost in this discussion is the role of federations as grantmakers. In the context of this report, that means they too would do well to attend to the concerns raised by grantees about their methods of deciding about grants, their grant application processes and their reporting requirements. As grantmakers, federations can benefit from the range of improvements other funders are instituting to aid their grantees and ensure a smoother process.

Concluding Reflections

This report has stressed a number of times that interviewees generally spoke positively about their relationships with funders, expressing gratitude for their largesse and commitment to causes. Those interviewed noted the personal involvement of some funders in steering not-for-profits to thrive and grow. Many funders do not stint on their support or limit their help to funding, but also provide wise guidance, posing thoughtful questions and connecting grantees to experts and other valuable resources.

Yet this report also covers matters of concern raised by many grantees about the policies of some foundations and the behavior of some individuals. How unusual is this when studying funder-grantee relationships? To answer this question, we turn our attention briefly from the focus of this report—statements by interviewees who work as professionals for Jewish not-for-profits—to the wider arena of philanthropy.

In recent years, deep social divisions and ideological disagreements within society at large have led to demands for greater scrutiny of those in positions of power, including big givers whose roles and influence were once seen as entirely virtuous, but are now regarded with greater skepticism. "The pushback to big philanthropy," notes David Callahan of Inside Philanthropy, "is best understood as part of a larger backlash to the growing dominance of U.S. society by the wealthy. Populism has gained steam on both the left and the right."[18] With much attention focused on societal inequality, tax exemptions that in essence require all taxpayers to subsidize the tax-exempt philanthropic vehicles of wealthy donors have not escaped notice. Questions have been raised about how the public benefits from current tax policies—e.g., Are the wealthy paying their "fair share?" Do tax laws enable the wealthy to shelter their earnings in ways average people cannot? Are vehicles such as foundations and Donor Advised Funds, which are regulated and encouraged by tax laws, in the best interest of American democracy?

Scrutiny has also increased because philanthropy itself is understood, in the words of Rob Reich, as "private actions in the public interest, the direction of private assets to produce public benefits." Precisely because what seem to be solely private decisions by funders as to the disbursement of their largesse, are now seen, in Robert Reich's words, "as part of a larger political economy of marketplace and corporate activity," and as "an exercise of power that warrants democratic scrutiny."[19] How funders conduct their grantmaking and the impact of their giving are no longer regarded only as their own business.

For some professionals in the Jewish not-for-profit sector, the allocation of philanthropic dollars to Jewish institutions warrants scrutiny: Are those dollars serving the Jewish "good?" How well do they enhance Jewish collective life and address the needs of sub-populations within the North American Jewish community? Who is looking out for the comprehensive and most pressing needs? Certainly, there are differences of opinion about these questions and consensus is unlikely. But shouldn't there be settings where these questions are asked and considered in a sustained fashion?

One aspect of funding drawing special attention is the question of transparency. A report by GrantCraft, an arm of the Foundation Center designed to improve the practice of philanthropy, states: "Foundations are under pressure from governments to be more transparent about their work. In the United States, foundations are under the watchful eye of lawmakers and others who rightly assert that if foundations are benefitting from tax-exempt status, they are obligated to make their work and operations open and available to anyone who asks. In Europe, many countries have amended their legal frame-work for foundations, affecting accountability and transparency regulations."[20]

Lest one think this is an entirely new issue, we note efforts already under way in the aftermath of World War II by Congress to press foundations to do their work with transparency. Testifying before a congressional hearing in the mid-1950s, the chairman of the Carnegie Corporation, Russell Leffingwell, a banker by trade, who served as board chair of the Carnegie Corporation, expressed his conviction that "the foundation should have glass pockets." By this he meant foundations must be transparent, so that anyone could understand how they do business and how they contribute to society. Summarizing the

[18] David Callahan, in an exchange with Phil Buchanan in the Comments section of, "Putting Critiques in Perspective in Pursuit of More Effective Philanthropy," Jan. 24, 2019. https://cep.org/putting-critiques-in-perspective-in-pursuit-of-more-effective-philanthropy/

[19] Rob Reich, *Just Giving: Why Philanthropy is Failing Democracy and How It Can Do Better*. Princeton, NJ: Princeton University Press, 2018, p. 15-16.

20 Opening Up: Demystifying Funder Transparency (2014), p. 3. http://grantcraft.org/wp-content/uploads/sites/2/2018/12/transparency.pdf

impact of the hearings and Leffingwell's statement, a report argued that "the best way to preserve philanthropic freedom was not to hide behind it; rather, foundations needed to tell the story of what they were doing, why they were doing it, and what difference it made in the world." Thus we can see that arguments for foundation transparency is not a 21st century innovation, but a movement with a 65-year pedigree.[21]

Today, organizations offering advice to grantmakers urge transparency. This is how one respondent framed the issue in a survey of grantmakers: "Openness and clarity about a foundation's interests from the start will save everyone time and money. You do not waste grantseekers' time as they try to navigate the often drawn-out and confusing application procedures that ultimately don't align with their work."[22] Navigating the complexities of grant prospecting, the vagaries of the proposal process and the time demands placed upon grantees were all issues raised by interviewees for this project.

Pressure for reform also comes from within the philanthropic community. Meetings of the Council of Foundations regularly feature presentations about the power imbalance in relationships with grantees and how to ensure proper ethical behavior. How the power imbalance can be used to impose a point of view on a grantee was personally experienced by a leading student of grantmaking who described his own "terrible interaction" with a program officer at a foundation: "I was treated as though I didn't know what I was doing—not someone who had been working with some success in the field for a number of years—by someone who seemed unprepared for our meeting, or for that matter unprepared for his job. He told me what he thought I was doing wrong in my job, citing 'facts' that weren't even accurate." Some gentle pushback to the foundation executive was met with stiff resistance, and so he opted to "go along, pretending to agree." Why? Because his organization couldn't afford to lose the funding. This situation is one that numerous professionals at Jewish not-for-profits have cited, not as the norm, but as periodic occurrences during their professional careers.[23]

There also is the matter of reporting and measuring outputs. Grantmakers for Effective Organizations (GEO), an agency created to help funders work more efficiently, states in one of its reports: "If done inefficiently, due diligence leaves nonprofits with overwhelming and redundant questions and forms. Even worse, a poorly designed due diligence process may not provide grantmakers with the information that can give a true picture of the grantseeking organization. When we take the time to design a more efficient and thoughtful process, due diligence benefits both grantmakers and grantseekers."[24] Peter Drucker, the management guru, observed that "performance assessment for givers is anything but easy." As explained by Phil Buchanan of CEP, this is "because it is so hard to demonstrate cause and effects in giving, the lack of objective measures, the multiple factors that go into the success of many initiatives and the extended timeframe needed to assess projects."[25] As we have seen, these caveats are not necessarily acknowledged by funders in the Jewish sphere, and have led to critiques by their grantees about burdensome and off-target reporting demands.

The CEP also works with foundations to further the agenda announced in its name. It has been outspoken about the need for funders to show humility and a willingness to learn from grantees. One of its reports quotes a CEO's advice to foundation personnel: "Remember that you are the middleman; you're trying to bring together on one side, the board, and on the other side, the grantees. It's not your money; it's the board's. It's not your program; it's the grantees'. And there is a certain humility that should come along with that."

To illustrate the point, the report includes the words of a funder whose father was the CEO of a business: "By listening to the people who bought the product," she reports, her father "was able to come up with innovations that significantly improved the experience for the end user. We use that approach at our [funding] organization. We talk with our grantees and listen to what they need. Then, we go back and make changes, and check in with them about how the changes are working. We ask, 'Is your experience better? Do you have more of what you need? Is your capacity now larger because of this?'" In doing so, she tries to emulate her father's humility

21 "History of Foundation Transparency," https://glasspockets.org/why-transparency/history-of-foundation-transparency.

22 GrantCraft Survey Response, 2013, quoted in Opening Up: Demystifying Funder Transparency, p. 8. http://grantcraft.org/wp-content/uploads/sites/2/2018/12/transparency.pdf

23 Phil Buchanan, *Giving Done Right: Effective Philanthropy and Making Every Dollar Count*. NY: Hachette, 2019, p. 108.

24 "What Does Effective Due Diligence Look Like?" GEO, May 29, 2014. https://www.geofunders.org/resources/what-does-effective-due-diligence-look-like-647

25 Buchanan, *Giving Done Right,* op. cit., p. 136, where Drucker is quoted.

when he recognized that he didn't know best and needed to get input from those who did.[26] Personnel at Jewish not-for-profits voiced similar concerns about funders—foundations as well as individual givers—who insisted they know better, and did not respect the expertise of seasoned professionals.

Regarding the issue of sexual harassment and the demeaning treatment of professional women in the not-for-profit sector: *The Chronicle of Philanthropy*, in conjunction with the Association of Fundraising Professionals, conducted a survey on sexual harassment. One in four female respondents and seven in 10 male respondents working in the U.S. and Canada reported having personally experienced some form of sexual harassment. One factor cited is the prevalence of women as fundraisers (70 percent) while men are often the funders or serving on boards.[27]

A preliminary report based on interviews with 250 professionals in countries as diverse as Afghanistan, Australia, Barbados, Britain, Canada, Germany, and the United States stated: "Three out of four fundraisers say they have faced undue pressure from donors, often in the form of sexual harassment but also through arm-twisting to advance a donor's personal agenda and career advancement or those of their friends and relatives." Half of the female fundraisers reported having experienced "sexually inappropriate behavior from donors—most commonly in the form of unwanted comments or sexually charged innuendo or banter. Of fundraisers who have experienced this behavior, 40 percent said they did not report it, and 32 percent said they did but their employer did not confront the donor and 'carried on as if nothing or little had happened.'"[28] While these findings are preliminary and not based on a random sample, the issues highlighted are echoed in other studies.

Many types of criticism voiced by professionals at Jewish not-for-profits are similar to what is expressed in the wider sphere of philanthropy. There also are distinctly Jewish considerations raised by some interviewees. Sweeping aside how the wealth of donors belongs to those funders to disburse (or not to disburse) as they see fit, some are pressing the question, "Whose money is it?" From a legal point-of-view, the answer is clear, yet some thoughtful people question whether funders are using their money wisely; whether they are driving the Jewish communal agenda in a responsible and informed manner; and whether there are negative ramifications for Jewish life stemming from the power that has accrued to big givers as a result of the dependence of not-for-profits upon their largesse.

These questions may be interpreted by some funders as hostile or unfair. But they also may be read as symptomatic of our times and potentially constructive. As Ben Soskis, a writer about American philanthropy, put it: "An aggressive—even at times an antagonistic—engagement between the public and their benefactors shouldn't be considered a mark of incivility. It should be considered a democratic imperative."[29]

This broader context can help inform new conversations about ways to improve the Jewish philanthropic ecosystem. Research conducted by a range of organizations devoted to upgrading the functioning of grantmakers and grantees, for example, emphasizes the corrosive effect on trust when funders behave badly. As a researcher who has studied how grantees around the globe perceive their funders has written: "Our whole profession is built on the public trust. When we're making excuses for behavior, when we're allowing people to be treated poorly, when we allow resources to be used for things other than the mission, we're compromising that trust."[30] Interviewees cited in this report have pointed to multiple ways they feel forced to play games, to engage in a "dance" with funders, and feel they in turn are treated with a lack of transparency by their funders. These behaviors erode trust on both sides of the funding table.

Equally harmful are the inefficiencies currently built into the system. When interviewees report on wasted hours of work,

[26] *Great Good: Lessons for Those Who Have Started Grantmaking Organizations*, Center for Effective Philanthropy, April 2019, pp. 7, 18. http://cep.org/wp-content/uploads/2019/04/CEP_Greater-Good_2019.pdf

[27] Timothy Sandoval, "Sexual Harassment is Widespread Problem for Fundraisers, Study Shows," *Chronicle of Philanthropy*, April 5, 2018. https://www.philanthropy.com/interactives/fundraiser-poll. The survey also found that colleagues at not-for-profits were among the harassers. See also, Otis Fulton and Katerina VanHuss, "#MeToo: Coming to a Non-Profit Near You," NonProfitPro, n.d. https://www.nonprofitpro.com/post/metoo-coming-to-a-nonprofit-near-you/

[28] These preliminary findings were reported by Emily Haynes, "Funders Often Feel Pushed Around by Donors, Say Researchers," *Chronicle of Philanthropy*, April 1, 2019. https://www.philanthropy.com/article/Fundraisers-Often-Feel-Pushed/246024

[29] Ben Soskis, "The Importance of Criticizing Philanthropy," *The Atlantic*, May 12 2014. https://www.theatlantic.com/business/archive/2014/05/the-case-for-philanthropy-criticism/361951/

[30] "Funders Often Feel Pushed Around by Donors, Say Researchers," op. cit.

diversion of staff from the tasks and priorities on which they should be focused in order to satisfy funders' requests for ever-more granular metrics, or when grantees report abusive, morale-damaging behaviors, they are describing circumstances distracting personnel from operating institutions and thereby weakening programs serving Jewish populations. If for no other reason, then, efforts to address the grievances outlined in this report are warranted in order to reduce wasted resources of personnel time and money.

Finding 12: With the rapid expansion of the North American philanthropic sector, a range of organizations has emerged to help funders improve their grantmaking processes. New approaches have been tried to streamline application and reporting forms, address the vexing question of overhead costs, improve communication between funders and grantees so that both can learn together, prepare younger foundation staff for their roles as grantmakers, and create alliances to ostracize and constrain abusive and harassing funders. The Jewish philanthropic sector does not have to reinvent its practices from scratch, but can explore and adapt best practices from the wider philanthropic community and other sectors.

The responses of funders included in this report suggest that not every critique of donor behavior is reasonable or on target. Professionals at foundations and individual funders have raised considerations that cast some of the criticism by grantees in a different light. Are funders concerned about the viability of a grantee organization after funding will end because they want to bet only on winners, or because they fear an overreliance of grantees on a single funder is dangerous for *the grantee*? Do funders limit their support of a grantee to a set number of years because they suffer from ADHD, or because they regard their role as agents of change, and must continually redirect funding to other worthy grantees developing new initiatives? Do funders casually demand more extensive reporting of outputs mainly to burden grantees with make-work exercises, or because they believe grantees will benefit from a better understanding of their own strengths and weaknesses, and can also use this knowledge to attract the support of other funders? Do funders offer no reason for turning down a proposal because they are haughty, or because they anticipate that any rationale offered will spur applicants to rewrite grant proposals in a way that may be more appealing to the funder but does not match the interests or abilities of the grantees—and will thus likely be rejected again? And can there be a meeting of minds between foundation professionals who are instructed by their boards and principal funder to develop initiatives promising change, on the one hand, and grantees who need funders to sustain their day-to-day operations, on the other?

One does not have to to believe naively that communication alone will resolve the strains in grantmaker-grantee relations. Power dynamics and unequal financial resources on the funder side complicate such conversations. Still, some effort to bridge the gap would help, especially where professionals on both sides of the figurative table misunderstand each other's goals and constraints.

In the wider philanthropic sector, organizations offering guidance to grantmakers and organizations working with grantees promote the virtues of a "feedback loop." These organizations are convinced that both sides would benefit from better and more frequent communication, about specific projects *and* about the nature of the work pursued by each. Continuing education for foundation professionals and lay people working as grantmakers is also seen as vital to enhance their understanding of the challenges. Similar educational programs are promoted for professionals in the not-for-profit sector. And some programs bring the two sets of professionals together for honest conversation. Might similar experiments be tried to bring those working for Jewish not-for-profits together with their counterparts in the funding community for conversations about their respective goals and priorities?

Finally, moving from the wider world of philanthropy back to the specifics of Jewish big giving, it's appropriate to ask how well the North American Jewish communities, which face serious internal and external challenges, are managing their significant, yet finite resources of both money and personnel. Funding is becoming ever more decentralized, as is communal life.

That is a reality unlikely to be reversed anytime soon. But as funders gather periodically to form collaborations and exchange information, have they built mechanisms to address the challenges facing North American Jews comprehensively? Have they created venues for reviewing and evaluating the complete range of Jewish needs? Have they asked whether their expenditures are addressing the most pressing of these needs? Is the funding they allocate proportionate to the magnitude of the various needs? In addressing these questions, might they benefit from the input of professionals in the Jewish not-for-profit sphere? A consensus may not emerge, but honest dialogue between funders and not-for-profit professionals could make for more effective and comprehensive Jewish philanthropy.

Recommendations from the Field

Improving Grantmaker/Grantseeker Relationships

As evidenced in this report, there are many positive facets of grantmaker-grantseeker relationships, but there is also room for improvement. Instead of framing recommendations based solely on the content of this report, The AVI CHAI Foundation, in partnership with the Jewish Funders Network, and facilitated by UpStart, convened 15 foundation professionals, philanthropists, and not-for-profit professionals to formulate recommendations that are responsive to the report findings. As the signatories of this document, we have the goal of sharing some of the best thinking of our communal leadership and creating a framework for further action.

The starting point for our conversation was that, overall, grantmaker-grantseeker relationships in the Jewish community are positive and there are many bright spots. There are, however, inconsistencies and a lack of norms—as well as differing perceptions of the actual and desired role of grantmakers. What follows are recommendations to address the shortcomings and bolster the bright spots. Participants in this process readily acknowledged that there is work to be done throughout the sector, including within their own organizations, to fully embrace the practices recommended herein.

This report covered many types of grantmakers (small family foundations, large staffed foundations, foundations with living donors, those working to preserve a legacy, and individual donors), along with many types and sizes of grantseekers. Some respondents (for example federation professionals) play a dual role as fundraisers and grantmakers. Within the foundation world, some foundations' trustees take an active part in setting policies and approving grants, while other foundations' policies and practices are largely shaped by professional staff. Participants in the recommendation process consistently acknowledged that it is difficult to generate a single set of recommendations to cover such a wide range of situations. Yet all agreed that changes need to be made and relationships need to evolve.

For the purposes of these recommendations, "grantmakers" refers to all the parties involved in the grantmaking process (e.g., professional staff, board members, individual donors, etc.). The term "grantseekers" is a catchall phrase for the not-for-profit professionals involved in seeking or receiving grant support (e.g., development professionals, CEOs, program staff, grantwriters, volunteers, etc.), referring to current grant recipients in existing relationships with grantmakers as well as applicants seeking to establish fiscal support.

Grantmakers and grantseekers share common interests in advancing Jewish life. Neither group can advance their important work without the other. Grantmakers and grantseekers both seek to meet needs, solve problems, and build the Jewish future. Both care about impact, standards, and effectiveness. They are interested in achieving success and learning from failure. However, they may have different levels of risk-tolerance and different definitions of "success" and "failure."

With all they share, grantmakers and grantseekers possess separate assets and play different roles in building the community. Grantmakers have resources, a birds-eye view of the landscape, and influence. Grantseekers have

expertise, direct relationships with beneficiaries, and the capacity to respond to changing needs in real time. Together, grantmakers and grantseekers form a dynamic force for meeting communal needs and creating change. This does not negate the fact that grantseekers need resources to survive and that grantmakers have limited resources to disburse. Grantmakers and grantseekers also have differing perceptions of the appropriate role for grantmaking, with implications for what gets funded and for how long. Our goal is not to ignore these tensions but to enable collaboration across these differences.

The recommendations below are framed as guidelines for grantmakers and grantseekers alike. We believe that the key to improving the grantmaker-grantseeker relationship is recognizing the mutual responsibility for some of the negative habits and patterns that have taken root.

Grantmakers	Grantseekers	Together
Share information about **how grant decisions are made** and share what you do and do not know about timeline and process.	Practice **candor, not spin**. Help grantmakers see things as they are and understand them more fully.	Discuss **vision, goals**, and **core beliefs**. Two-way sharing builds rapport and ensures a better fit and outcome.
Set clear expectations about the probability of funding and the anticipated funding trajectory (how many years and how much funding might be available).	Share honestly what it r**eally costs to do business.** Back up projections with research and data.	Create space where **feedback** that contributes to learning and growth is shared and received.
Discuss **what "no" means** when a grant is declined. Grantseekers often hear "no" as meaning "not yet," and are not certain when to continue pursuing support and when to back off.	**Seek advice** from grantmakers, not always as a tactic to gain funding, but as a learning opportunity.	Convey information in **clear, specific language, without jargon**.
Introduce successful grantseekers to other funders to help them grow their **pipeline of support**.	Make the effort to host grantmakers for **site visits** and to structure those visits so that they are able to better understand the work in the context of the grantmakers' own goals.	Invest time in **relationship-building** beyond the nuts and bolts of grant management.
Help grant seekers to **network, convene**, and **amplify their voices**.	Inform grantmakers when things **do not go as planned**; provide updated information on plans for steering things back on course.	Seek **input** from each other when contemplating **strategy** pivots and growth.

We offer two sets of recommendations. The first set consists of basic recommendations that we feel should form the basis for all grantmaker-grantseeker relationships. While they may seem elementary, they require effort, intention and attention. These recommendations relate primarily to the dynamics within individual grantmaker-grantseeker relationships.

The second set of recommendations is aspirational. We generated these to put forth options for further exploration. These options may require the creation of new tools and mechanisms for relationship-building. We share these aspirational recommendations in a "What if..." framework to inspire field-level change.

Basic Recommendations (For Individual Grantmaker-Grantseeker Dyads)

- **Build Trust and Understanding**
- **Increase Transparency**
- **Improve Communications**
- **Amplify Positive Norms**
- **Establish New Norms**
- **Educate and Train Grantmakers and Grantseekers**

Below are specific actions grantmakers and grantseekers can take independently and together to actualize the basic recommendations.

In addition to these basic recommendations, we envisioned actions that we might take as a field over the long term. Some of these actions require comunal conversations, a higher level of coordination, and a shift in culture, as well as the adoption of new tools and practices. In other cases, groundwork has already been laid and work is ongoing, so we now need to drive that work forward with greater momentum. While some of the field-level changes may play out within the grantmaker-grantseeker dyad, we believe that more work needs to be done to build relevant tools and make the case for these changes before they will be widely adopted. We believe these field-level changes are achievable if there is the communal will and leadership to drive the change.

WHAT IF, As a Field, We

- Reframe the "overhead" conversation so grantmakers and grantseekers are aligned in their understanding of the true cost of achieving change.
- Commit to more multi-year grants, allowing for more authentic, transparent and forward-looking conversations among grantmakers and grantseekers.
- Develop a standard set of application, evaluation and reporting tools to streamline the grantmaking process. This includes tools that enable grantmakers and grant recipients to effectively assess outcomes, thereby facilitating greater trust, constructive and honest feedback, and ultimately more aligned outcome and impact measurement.
- Cultivate understanding and empathy among grantmakers and grantseekers so that they truly understand each other's roles and limitations. Build in more community-wide opportunities for non-transactional conversations and dedicated time and space for shared thinking, learning and co-creation.
- Develop a set of policies and norms, with case studies for illustration, of strong and productive relationships that can be the basis of a curriculum in training and onboarding programs for new grantmakers.
- Join forces to continue advancing the communal conversation on gender discrimination, sexual harassment, and DEI (Diversity, Equity, and Inclusion).
- Ensure that grantmaking decision-makers include those with not-for-profit experience.

It is our hope that by bringing attention to, and being intentional about, the recommendations we have set forth above, we will bring greater consistency and harmony to the already strong and effective grantmaker-grantseeker relationships in our community.

Everyone has room to grow. It is our intention that this report, and these recommendations, serve as a tool for reflection and as a catalyst for conversation and positive action.

Signed:

1. Kate Belza O'Bannon, Repair the World
2. Rachel Cort, Mishkan
3. David Cygielman, Moishe House
4. Barry Finestone, Jim Joseph Foundation
5. Jeremy Fingerman, Foundation for Jewish Camp
6. Jeff Finkelstein, Jewish Federation of Greater Pittsburgh
7. Idana Goldberg, The Russell Berrie Foundation
8. Aaron Katler, UpStart
9. Alisa Kurshan, Consultant
10. Jonathan Lev, Boulder JCC
11. Dena Libman, Azrieli Foundation
12. Adina Poupko, Natan Fund
13. Yossi Prager, formerly of The AVI CHAI Foundation
14. Gil Preuss, Federation of Greater Washington

Participant titles and affiliations are used for identification purposes only and do not reflect an organizational endorsement of the recommendations provided herein.

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Alli Abrahamson, Director of Advancement, Adelson Day School, Las Vegas; Rhonda Abrams, Director of Development, Hillels of Greater Portland, OR; Andres Abril, Director, Mid-Atlantic Regional Director, U.S. Holocaust Museum; Sara Allen, Jewish Teen Initiative, Los Angeles; Kathy Assayag, Executive Director, Jewish Communal Foundation of Montreal; Melissa Balaban, CEO, Ikar, Los Angeles; Felicia Baskin, Council for Jewish Elderly, Senior Life, Chicago; Monica Mendel Bensoussan, Development Director, Talmud Torah/ Herzliah High School, Montreal; Monica Berger, former National Executive Director, Jerusalem Foundation, Montreal; Myer Bick, President Emeritus, Jewish General Hospital Foundation, Montreal; Richard Block, Rabbi, The Temple-Tifereth Israel, Cleveland, OH; Melvin Bloom, retired CEO, American Technion Society; Eliav Bock, Director, Ramah of the Rockies; David Bryfman, the Jewish Education Project, NY; Steven Burg, Director General, Aish HaTorah; Elyse Buxbaum, Deputy Director of Development, Jewish Museum, NYC; Ken Chasen, Rabbi, Leo Baeck Temple, Los Angeles; Malcolm Cohen, Rabbi, Temple Sinai, Las Vegas; Mitch Cohen, National Director, National Ramah Commission, NY; Phyllis Cook, Managing Director, PLC Philanthropic Services, San Francisco; Amy Skopp Cooper, Associate Director, National Ramah Commission; Josh Cooper, CEO, Baycrest Health Sciences, Toronto; Risa Alyson Cooper, Executive Director, Shoresh, Toronto; Rachel Cort, Executive Director, Mishkan, Chicago; Andrew Cushnir, Executive Vice President, Donor Relations, The Jewish Federation of Greater Los Angeles; Jacob Cytryn, Executive Director, Camp Ramah, Wisconsin; Beth Kander-Dauphin, Development Coordinator, Goldring/Woldenberg Institute of Southern Jewish Life (ISJL); Nancy Drapin, Executive Director, Temple Kol Ami, Scottsdale, Arizona; Zalman Duchman, International Director, Colel Chabad; Brian Eglash, Senior VP and Chief Development Officer, Pittsburgh Federation; David Eliezrie, Rabbi, North County Chabad, CA; David Ellenson, Acting President, Hebrew Union College—JIR; Steve Engel, CEO, Tamarack Camps, Detroit, MI; Richard Enslein, Executive Director of Florida Region, American Committee for Weizmann Institute of Science; Bentzi Epstein, Rabbi, Dallas Area Torah Association; Barbara Farber, Director of Development and Endowment Fund, Jewish Family and Children's Services of San Francisco; Mariam Shpeen Feist, Senior Vice President and Chief Development Officer, Jewish Federation of Greater Dallas; Jeremy Fingerman, CEO, Foundation for Jewish Camp, NY; Jeff Finkelstein, President and CEO, Jewish Federation of Greater Pittsburgh; Eric Fingerhut, President,

Hillel International; Dan Forman, Senior VP for Development, Yeshiva University; Joel Fox, Chief Development Officer, Jewish Social Services, Menorah Park Foundation, Cleveland; Elana Frank, Executive Director, Jewish Fertility Foundation, Atlanta; Julia Franks, Chief Strategy Officer, Nevada Federation; Mark Freedman, recently retired CEO of Nashville Federation; Steve Freedman, Head of School, Hillel Day School, Detroit; Edna Friedberg, Historian, U.S. Holocaust Museum, Washington DC; Shelly Friedman, Director of Development, Anti-Defamation League, Southeast FL; Paul Frishman, CEO, Miami Beach JCC; Misha Galperin, ZANDAFI Philanthropy Advisors, NY; Atty Garfinkel-Berry, Director of Hillel in Reno and six other locations; Larry Gast, VP for Development, Moishe House, Chicago, IL; Yuliya Gaydayenko; Senior Director of Adult Services, Jewish Family Service, Detroit; Irv Geffen, Senior Vice President of Foundation, MorseLife, West Palm Beach, FL; Dave Gendel, Vice President of Donor Relations, Keshet, Chicago; Don Goldman, Executive Director and CEO of Jewish Family Services, Kansas City; Shari-Beth Goldman, Chief Program Officer, Jewish Family Service, Detroit; Alyssa Golob, Executive Director of Jewish Housing and Programming, Twin Cities; Steve Greenwood, Director of Development, URJ Camp George, Toronto; Matthew Grossman, CEO, BBYO, Washington, DC; David Harris, Executive Director of Rimon, Minnesota Jewish Arts Council, Minneapolis; Janet Heit, Director of Foundation Relations, American Friends of the Hebrew University; Dan Held, Director, Centre for Jewish Education at Federation, UJA Federation of Greater Toronto; Anna Herman, Director, URJ Henry S. Jacobs Camp, Mississippi; Adam Hirsch, Director of Individual Giving, JCC San Fransisco; David Hoffman, Vice Chancellor and Chief Advancement Officers, Jewish Theological Seminary; Kenneth Hoffman, Executive Director, Museum of the Southern Jewish Experience, Mississippi; Marjan Katz, Capital Campaign Director, Gross Hebrew Academy, Miami Beach, FL; Linda Kislowicz, retired CEO, Jewish Federations of Canada; Simon Klarfeld, Executive Director, Young Judea Global; Aliza Kline, Executive Director, OneTable; Lara Knuettel, Staenberg-Loup Jewish Community Center, Denver; Sherie Koshover, Chief Advancement Officer, Jewish Senior Living Group, San Francisco, CA; Aaron Kotler, President, Beth Medrash Govoha—the Lakewood Yeshiva; Doron Krakow, President and CEO, JCC Association; Alisa Rubin Kurshan, Project Director, Project Accelerate; Michelle Labgold, Chief Planning Officer, Great Miami Jewish Federation; Anne Lanski, CEO, iCenter, Chicago; Margo Lazar, Development Director, Hillel of Metro Detroit; Seth Leslie, Chief Development Officer, Oshman JCC of Palo Alto, CA; Jay Leipzig, Partner Chazan-Leipzig Consulting, NY; Lisa Lepson, Chief Executive Officer, Upstart, San Francisco; Jonathan Lev, Executive Director of Boulder JCC, CO; Abbie Levin, VP for Development, Cleveland Jewish Federation; Jeffrey Levin, Chief Development Officer, Greater Miami Federation; Joy Levitt, Executive Director, JCC of the Upper West Side, Manhattan; Jay Lewis, Campus Support Director, Hillel International; Shalom Lipskar, Rabbi,Chabad of Bal Harbor/Surfside, FL; Michelle Lobovits, Executive Director, Jewish Community Center of the Palm Beaches, FL; Monica Loebl, National Director of Development, American Friends of the Hebrew University; Shia Markowitz, CEO, Agudas Israel; Mark Medin, Executive VP, UJA-Federation of Greater New York; Hedy Milgrom, Senior VP and Development Officer, Cleveland Jewish Federation; Adam Minsky, President and CEO, UJA Federation of Greater Toronto; Brian Mono, Reconstructionist Rabbinical College; Francie Miran, capital campaign director, Temple Emanuel, Denver; Iris Mizrahi, Executive Director, Beth David Synagogue, Miami FL; Joanna Sasson Morrison, Community Development Direct Services, Jewish Immigrant Aid Services (JIAS) Toronto; Michelle Movitz, Director of Development, The Ark, Chicago; Howard Niestein, Chief Administrative Officer, Jewish Federation of Metropolitan Detroit; Karen Parry, Director of Development, Jewish Federation of Greater Seattle; Marc Penner, CEO, Shalom Park, Denver; Amanda Pogany, Head of School, Luria Jewish Day School, Brooklyn, NY; Harriet Kirsh Pozen, Generations Campaign Director, Shalom Austin; Eileen Snow Price, CEO, In the City Camp, Atlanta; Gail Reis, President and CEO, American Friends of Tel Aviv University; Dawn Richard, Director of Development, Jewish Family Services of Denver; Ana Robbins, Executive Director, Jewish Kids Group, Atlanta; Carolyn Rose, VP, Jewish Community Foundation of the Federation of Palm Beach, FL; Debbie Rothschild, Director, The Montefiore Foundation, Beachwood, Ohio; Carol Ruderman, Executive Director, Shalva, Chicago; Jay Sanderson, President and CEO, The Jewish Federation of Greater Los Angeles; Todd Sandler, Development Officer, Jewish Family and Children's Service of Minneapolis; Rachel

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