

Foundation Simulation Program

San Francisco Bay Area Regional Teen Philanthropy Retreat *
November 9-11, 2007 * Marriott- San Mateo

Introduction

This simulation program was originally designed as a 2 1/2 –hour Saturday night activity for the first annual Western Massachusetts B'nai Tzedek Shabbaton in December 2003. The program was developed by Rabbi Jonathan Spira-Savett, K'vod Weider and Sue Schwartzman. This reworking of the program was written by Gabe Salgado for the 2005 San Francisco Bay Area Regional Teen Philanthropy Retreat.

Goals:

1. For teens to experience how foundations operate
2. For teens to understand the resources and relationships developed by The Jewish Community Endowment fund of the Jewish Community Federation.
3. To build teen sensitivity to the challenges non- profit organizations may face in attempting to secure grants.
4. To expose teens to a vast number of non-profit organizations that work in six fields.
5. Teens will become familiar with the RFP format
6. Teens will practice evaluating and summations of RFP
7. Teens will role play either Foundation Board Members or Non-Profit organization's spokespeople representing a Request for Proposal
8. Teens will gain competence in foundation vocabulary.
9. Teens will practice group decision making skills in either applying to a foundation for a grant, or making allocation decisions for a foundation

Supplies:

Pens	Name tags with organization names
For each "Non-Profit":	For Each "Foundation":
Summary Sheets	Summary Sheet
Copy of their own RFP	In-depth role profile
Appointment Books	Appointment books
Stickers with name of NPO	Stickers with name of Foundation
Name tags with name of NPO	6 blank checks
List of Foundations with brief summary	7 acceptance letters
	12 rejection letters
	Name tags with name of Foundation
	Envelopes
	RFP's for all non-profits

Several funders have joined with the JCEF in funding the Teen Philanthropy Initiative (TPI) led by the \$750,000 endowment of PJCTF by the Serrano Foundation, a supporting foundation of the JCEF. Major funders include the Alijon Charitable Trust, Stanley S. Langendorf Jewish Fund, L&R Lawrence Family foundation, Alexander M. and June L. Maisin Foundation, Bernard Osher Jewish Philanthropies, all supporting foundations of the JCEF; the Fanny Bess Philanthropic Fund and Laura and Gary Lauder Philanthropic Fund of the JCEF; the Breetwor- Evans Family Fund of the Silicon Valley Community Foundation, the Jim Joseph Foundation and the Jewish Teen Funders Network. East Bay Funding generously provided by the Morton and Amy Friedkin Family Foundation, the Ronald and Gail Rubenstein Philanthropic Fund which are funds of The Jewish Community Foundation of the Greater East Bay and The Shores Foundation.

1) Intro & Meetings as Foundations/Organizations (20 mins.)

Give a brief introduction to the Foundation Simulation. All Board members will be split into four Foundations and 14 Non-profit organizations. In *two-hour* program, we will simulate a grant cycle by following the procedures that real Foundations and Non-Profits follow over the course of *many months*.

Nametags will then be distributed, and each Foundation/Non-Profit will meet to figure out what their respective projects are all about, and to align their goals.

- a. **The goal of the Non-Profits is to identify Foundations that are likely to fund their projects.** They should review bios of organizations and attempt to assess how they can fulfill their needs- which ones are worth pursuing for a presentation and which are not.
- b. **The goal of the Foundations is to identify Non-Profits whose projects might meet the funding priorities of the Foundation.** The Foundation boards should begin to look at grant proposals- skimming them to decide which organizations they are interested in learning more about. Later on, they will have the opportunity to schedule presentations with those Non-Profits that particularly interest them.

Following the meetings, a **Funders Fair** will take place during which representatives of Foundations and Non-Profits to schedule presentations using their appointment books and stickers. All Foundations and Non-Profits should strategize to target each other for presentations.

Finally, recognize that this will be a semi-realistic simulation of the trials and tribulations of non-profit organizations and the decision-making process of a Foundation. **Stress that it is the work of the Foundations that we will be carrying out;** the Non-Profits are in the simulation for realism and so that we may get a taste of “their side” of the process, which will be discussed following the end of the simulated grant cycle. In short- don’t take anything personally!

2) Funders Fair- 10 mins.

Using their appointment books and stickers, Foundations and Non-Profits will set up appointments with each other for after dinner and Havdallah. **(We should be prepared for this step to happen either before or after dinner, depending on how long the intro and initial meetings take.)**

The appointment books will have symbolic rather than actual times (4:00, 4:30, etc.). In actuality, the presentations will last no more than five minutes. During the time set aside for presentations, the staff will call out the “times,” giving ample warning before presenters should switch to a different foundation.

3) Prep for Presentations/In-depth examination of proposals- 20 mins.

The Foundations and Non-Profits should use this time respectively to do a thorough reading of the proposals they are considering and to prepare for presentations.

4) Presentations- 20 mins

The time for the presentations has arrived! Staff members will call out the symbolic “times,” giving warning in the minutes between presentations so they’ll know how much time they have.

5) Final Deliberations- 20 mins.

While the Non-Profits debrief their presentations and ponder the success of their endeavors, the Foundations will discuss and decide how to allocate the money they have available for grants. At the end of this time, the Foundations should fill in the address and dollar amount information into the acceptance letters, address information into the rejection letters, and all letters should be signed. In addition, the “blank checks” should be filled in and should be prepared for delivery in the envelopes

6) NOTIFICATION DEADLINE: Delivery of acceptance/rejection letters- 5 mins.

The Foundations will deliver the acceptance/rejection letters to the Non-Profits.

7) Summary and Debrief- 20 mins.

Briefly summarize the simulation, acknowledging that the frustrations of the process are a very real part of a grant cycle, before announcing groups for the Debrief.

The debrief will be led by staff members. Use the following questions as a guideline for a discussion of the process:

To those who represented Non-Profits:

Describe your experience.

What was it like to face questioning?

What was it like to be turned down for a presentation?

What was it like to receive funding? To be turned down?

To those who represented Foundations:

How did you decide how much to allocate to whom?

What difficulties did you encounter in your decision making process?

Were you satisfied with the decision?

Do you think it’s better to give more grants, or more funding for one project?

To All:

What can we glean from this process about what lies ahead for us members of a Foundation Board and as Jewish givers?

8) Final Debrief with everyone- 5 mins.

Before announcing carpools and breaking for City Beach, we will specifically acknowledge the frustrations of the Non-Profit organizations in attempting to schedule presentations and receive funding. This was a very realistic simulation of what the process will be like for “the other side,” therefore our resolve to fairly evaluate the proposals and understand our own goals and carefully articulate them should be even stronger.