



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



BBYO Impact Philanthropy Boot Camp Agenda, July 25, 2012

1:00 Gather at Millennium Park

1:00-1:15 Jewish Philanthropist Scavenger Hunt

Participants will be divided into groups of 6 and will be given a list of all the structures at the park. They then must link each up with the names of the donors who funded them. Bonus points are given to those who can identify the Jewish donors.

Program materials:

- List of questions to ask before the activity begins
- List of all the features at the park + list of all the donors
- Pens or pencils

1:15-2:00 Lunch + debrief about the scavenger hunt

Program materials:

- List of questions to ask participants about the scavenger hunt
- Handout on structures at Millennium park by donor and cost

2:00-2:15 Walk to the Federation

2:15-2:30 Get into the building

2:30-3:30 What is a foundation?

Program materials:

- Price is Right game board with facts about foundations
- Price is Right answers
- What if there were no nonprofits?
- Grant cycle handout (use Voices as the example)
- Starbucks gift card
- Donor motivations for creating a private foundation
- Butcher paper + markers for making a list of all the motivations a donor has for creating a foundation
- *What is a Foundation* curriculum

3:30-4:15 What does it mean to be a Jewish philanthropist. Use the Crowns, Luries, and Pritzkers as examples. Talk about anonymous vs. publicized (Millennium Park plaques) giving.

Program materials:

- Tzedakah vs. philanthropy / sympathy vs. empathy sheets
- Rambam's Rungs
- Write-up of all three philanthropists



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



- *What is a Jewish Philanthropist curriculum*

4:15-4:30 Snack + break

4:30-5:00 Spectrum activity, values clarification

Program materials:

- Tape
- List of values clarification spectrum questions

5:00-5:30 Jewish texts/corners activity

Program materials:

- 11x17 quotes
- List of facilitator discussion questions

5:30-6:15 Foundation allocation

starting with individual tzedakah contributions based on subject, then continuing on to funding grant proposals and forming small group foundations that must give as a unit

Program materials:

- Large organization descriptions
- Handouts of organization descriptions
- Tape
- Worksheet about how to set (brief) grant guidelines
- Facilitator discussion questions

6:15-6:30 Bathroom + pack up and leave



Discussion Questions for Millennium Park Pre and Post Scavenger Hunt

Before the scavenger hunt:

- Give a brief explanation of why the park was built, and how long it took (the land used to be a bunch of parking lots, it took 7 years to build, it offers tons of free entertainment to Chicago locals and tourists such as concerts, free work-out sessions like yoga and Pilates, free dance lessons, movie showings, public art installations, a free garden walk, public bathrooms, and countless places to just hang out and enjoy the weather.) It is also totally wheelchair accessible.
- Ask how much money they think it took to build this park (over \$485 million). Ask how they think it was financed. Explain that about half of the funds came from the taxpayers of Chicago and the city budget, but half of the funds came from individual donors or corporations.
- Explain the rules of the scavenger hunt:
 - 1) Split up into groups of 6
 - 2) Each group has 15 minutes to find all the structures listed on the left side of the game sheet and match them up with the names of the donors on the right side.
 - 3) One point is given to each correct match
 - 4) Bonus points to the teams who can identify the Jewish donors

After the scavenger hunt:

- 1) Go over the results of the scavenger hunt:
 - Who got every match correct?
 - What did you notice about the names on the plaques? (Jewish names, corporations names, foundation names, etc...)
- 2) What did you observe people doing while they were at the park?
- 3) Why do you think corporations would donate to the park? (Mention the function of corporate foundations)
- 4) Why do you think wealthy individuals would donate to the park? (Mention the function of family foundations)
- 5) What do you think about the fact that half of the funds for the park came from Jewish donors?
- 6) Who are some famous philanthropists you can think of? What sorts of causes do they give to?
- 7) What are some other examples of buildings or city features can they think of that were donated either by a philanthropist or a corporation? Either in Chicago or in their home city?



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



- 8) We will continue this discussion once we are back at the Federation (make sure they look at the wall of donors once they get into the building).



Discussion Questions for Text Activity

To read as an introduction to this part of bootcamp:

Foundations get organized when a person, or a group of people want to grant money to specific causes or nonprofits that they are passionate about. (Ask participants to identify some of the causes or nonprofits they would grant money to if they had \$1 million.)

As we have been learning, philanthropy differs from tzedakah in many ways, but one of the ways it differs is that philanthropists and foundation board members typically operate from a specific mission statement that guides the work they do. So, instead of just writing a check to the nonprofits they care most about, they think first about some of the values and goals they have that will inform the decisions they make.

Explain that the group is going to break down into 9 groups that will all represent a foundation. The way you are going to form these foundations is going to be based on 1 of the 9 quotes that you see listed on these walls. Take some time to walk around and read all the quotes. Some of them are from the bible, some of them are from philosophers, and some of them are from people just like you and me; but all of these quotes are Jewish in essence. Once you have the quote that inspires you, have a seat next to it. There can only be 5 or 6 people per group.

Discussion Questions for Facilitators

1. Why did you choose this text?
2. What does this text mean to you?
3. What resonates with you in this text? Why?
4. Do you have any personal experiences that relate to the text you picked? If so, what are those experiences?
5. How are your values expressed in this text?
6. In what ways are the values and ideas in these texts reflected in the world around you?
7. How does money play a role in the ideas portrayed in the text you chose?



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



Donor Motivations for Creating a Private Foundation

Altruism: The personal satisfaction achieved through aiding charitable causes

Gain perspective on community needs through more involvement in the funding process

Tax benefits

Ability to **balance giving** from year to year

Foster philanthropic values by **involving family** in the philanthropic process

Create a legacy of charitable giving/community building

Gain a higher profile in the community

Shield the donor from direct solicitations



Grant Guidelines Discussion Questions for Facilitators

1. Foundation name: What is the most important value we can take away from our text and use to create the name of our foundation? What does our name say about the kind of work we hope to do as a foundation?
2. Statement of purpose: How can we translate our Jewish text into our foundation's statement of purpose? (It might be helpful to set the field of interest first.)
3. Field of interest: Does our Jewish text give us any clues about what our field of interest should be? Is our field of interest very clear like "Environmentalism" or "Basic Needs for Homeless Children," or is it more broad, like "Providing opportunities for people that might not otherwise have them," or "Strengthening the Jewish community"?
4. Geographical range: How will we decide this? Why have we come to our decision? What are the pros and cons of funding local vs. national vs. international?
5. Jewish vs. Secular: How will we decide this? Why have we come to our decision? What are the pros and cons of funding Jewish vs. secular organizations?
6. Topics that are not funded: How did we come to this decision? What is the benefit of limiting our areas of interest? What is the disadvantage of limiting our areas of interest?
7. Dollar range: How and why did we come to our decision? What are the advantages and disadvantages of our decision?



Setting Grant Guidelines- What is the Point???

Guidelines inform grant applicants about what your board hopes to accomplish. They clarify the projects, proposals and organizations you want to assist—and also point to what lies outside your interests.

What Should Your Guidelines Contain?

1. The name of your foundation. Try to base the name off of the Jewish text you used to organize your foundation.
2. A statement of purpose, declaring the goal of your foundation's grant-making program. This should be one or two sentences long, and it should incorporate some of the values or messages from the Jewish text you used to organize your foundation.
3. An indication of your foundation's field of interest characterized in general, familiar terms, such as literacy, AIDS, or the environment.
4. The geographical range in which your foundation will consider funding, indicating whether your foundation will consider funding organizations exclusively from your city, county, region, state, nation or the entire world.
5. An explanation about whether your foundation will fund Jewish organizations that serve only Jewish people, Jewish organizations that serve both Jewish and non-Jewish people, and/or secular organizations.
6. Examples of any topics or areas your foundation definitely will not fund.
7. Any special interests or emphases not otherwise indicated in the statement of purpose.
8. The typical dollar range of your grants. Will your foundation be giving one large grant? Or will your foundation be breaking down their dollars into smaller gifts?

(Use the other side of this page to compose your foundation's grant guidelines)



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



Grant Guidelines Worksheet

1. Name of your foundation: _____

2. Statement of purpose: _____

3. Field(s) of interest: _____

4. Geographical range: _____

5. Jewish vs. secular? _____

6. Any topics or areas your foundation definitely will not fund: _____

7. Any special interests or emphases not otherwise indicated in the statement of purpose:

9. Dollar range: _____



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



Millennium Park Structures Listed by Donor and Cost

<u>Project</u>	<u>Proposed cost</u>	<u>Final cost</u>
Garage	\$87.5 million	\$105.6 million
Metra superstructure	\$43.0 million	\$60.6 million
Jay Pritzker Pavilion	\$10.8 million	\$60.3 million
Harris Theater	\$20.0 million	\$60.0 million
Park finishes/landscaping	N/A	\$42.9 million
Design and management costs	N/A	\$39.5 million
Endowment	\$10.0 million	\$25.0 million
<i>Crown Fountain</i>	\$15.0 million	\$17.0 million
BP Pedestrian Bridge	\$8.0 million	\$14.5 million
Lurie Garden	\$4.0–8.0 million	\$13.2 million
<i>Cloud Gate</i> sculpture	\$6.0 million	\$23.0 million
Exelon Pavilions	N/A	\$7.0 million
Wrigley Square/Millennium Monument	\$5.0 million	\$5.0 million
Chase Promenade	\$6.0 million	\$4.0 million
McCormick Tribune Plaza & Ice Rink	\$5.0 million	\$3.2 million
AT&T Plaza	\$3.0 million	\$3.0 million
Misc. (fencing, terraces, graphics)	N/A	\$1.6 million
Total (uses higher Lurie Garden figure)	\$227.3 million	\$485.4 million

*Source: *Chicago Tribune*.

\$150.5 million came from Jewish families. (That is almost 1/3 of the entire budget!)

\$31.7 million came from corporate giving

\$5 million came from a non-Jewish family foundation

The rest came from taxpayers and the city budget

Philanthropy Boot Camp **Thoughtful Philanthropy**

For doctors, the #1 rule is "First Do No Harm." The same should be said for good philanthropists. But how can donating money cause harm? Well, philanthropy that is not thoughtful can be a waste of money or can even harm the organization it is supposed to be helping.

Example 1: Giving money to an organization to fund services that the organization doesn't have the ability to provide.

The Three Rivers Organization helps to clean up rivers and streams. They are relatively small, with just three staff members, who earn low salaries, and an annual operating budget of \$150,000. Their work consists of leading volunteer groups to collect garbage along local riverbanks while teaching about the effects of pollution on that particular river, speaking to grade school students about ecology, researching the companies that are polluting local rivers, and writing to government officials. Your foundation believes high school students should learn about these issues, and wants to donate \$50,000 to an organization that can teach teens about river pollution on special rafting trips. How could this grant be harmful to Three Rivers Organization?

Example 2: Not researching an organization well enough (due diligence).

The Victims of Hurricanes Relief Fund is a small organization that collects money to help victims of hurricanes around the globe with immediate cash assistance. They only have two staff people: an executive director and a secretary. Their website says that they have collected more than \$2 million so far. How could a grant to this organization be harmful? What are some of the questions you should ask before donating money?

Example 3: Requiring too much of your grant recipient.

Your foundation likes to make sure that your grant money is being used wisely. You require progress reports and updated budget statements every month. In addition, you like to send someone from your foundation to "drop in" unexpectedly to see how services are being provided. How could these requirements be harmful to organizations, especially small organizations?

Example 4: Giving less than is really needed.

A local homeless shelter would like to hold a special event--dinner and a movie-- the night after Thanksgiving because they have noticed that their clients exhibit signs of depression the day after Thanksgiving. On Thanksgiving Day, they have most of their food donated and plenty of volunteers to serve, and they've heard from restaurants and stores that nobody can afford to donate more. The shelter needs \$2,000 to create a delicious and nutritious meal and to rent the equipment to show a movie. Two weeks before Thanksgiving, your organization decides to give them \$1,000. How could this be harmful?



Philanthropy Bootcamp *What Does it Mean to be a Jewish Philanthropist* Curriculum

1. Ask the participants to describe what a philanthropist is.
2. Ask the participants to describe what they think a Jewish philanthropist is. Pass out Rambam's Rungs and explain that we have an outline from Maimonides that gives one perspective on what it means to be a Jewish philanthropist. Pass out the write-up of all three philanthropists and explain that these are three more perspectives on what it means to be a Jewish philanthropist. Ask the participants to take some time to read the handout and then identify some of the differences and similarities between the three philanthropists.
3. Ask the participants to shift their focus to the difference between empathy and sympathy. Ask the group to split into 9 groups, and have the educators lead a discussion about the empathy vs. sympathy & philanthropy vs. tzedakah matrix. Be sure to explain that while there are differences, it is not about what is better. All four of these things have value.
4. Watch the empathy video.

DISCUSSION QUESTIONS

1. After the video, do you see a stronger connection between empathy and philanthropy?
2. What is "Jewish" about the phrase: "Empathy is the opposite of utopia... Empathy is grounded in the acknowledgement of death and the celebration of life, and rooting for each other to flourish and be." Answer: Judaism IS a celebration of life. Therefore, to be Jewish is to be empathic.
3. How do you think the video relates to the work the work of philanthropists?
4. How have your parents instilled empathy in you?
5. Why is it considered philanthropic to address human needs as well as the needs of the environment? Why is it philanthropic to address your neighbor's needs as well as people across the globe? Why is it philanthropic to donate money to a symphony, or to build a garden, or to an art museum, as well as to organizations meeting basic needs?

Empathy = solidarity. What is solidarity? Empathy is not just solidarity with other human beings, but also with other creatures and with the planet. As philanthropists, we are not bound by how we show our empathy. We can address human needs, environmental needs, animal needs, etc... because empathy is the acknowledgement that everything and everyone on this planet is connected and valuable. This is true solidarity. To empathize is to civilize.

The nations, races, governments, and even religions that act to unify AND segregate us, that act to level the playing field AND promote hierarchies of human value, are all organized



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



and/or endorsed by HUMANS. They have value because we allow them to have value. The goal of true empathy is first to acknowledge this process, and then to move beyond it into solidarity. The point of this is not to ignore differences. Rather, the point of this is to achieve solidarity beyond ourselves.



Philanthropy Bootcamp *What is a Foundation* Curriculum

1. Ask the participants “Based on what you learned at Millennium Park, who can tell me what a foundation is?”
2. Ask them: What is the difference between the philanthropic work a foundation does and the philanthropic work you or I do when we give to our favorite non-profits?
 - Foundations typically have a lot of money to give away every year
 - Foundations invite organizations to apply for grants, instead of just writing checks
 - Foundations are organized entities with mission statements, grant guidelines, and various policies they use to determine the work they do
 - Foundations do a lot of research on community needs in order to determine the most strategic ways to allocate their money
 - Foundations can be comprised of just one person, or they can have boards of directors and paid staff people to help allocate money
 - The money foundations have can come from private wealth (like the Crowns and the Pritzkers) or it can be established by a company (like Boeing or Chase).
3. Distribute the “What if there were no nonprofits” handout. Explain that foundations, both private and corporate, are some of the main supporters of these nonprofits. Other sources of revenue come from individuals (who don’t have foundations) and governments. Non-profits also sometimes do their own fundraising events.
4. Distribute the “Life of a Voices grant” handout. Explain what Voices is and use the handout to illustrate how foundations operate.
5. Ask for a volunteer to write down on the butcher paper all the reasons why someone would start a foundation.
6. Play the Price is Right game.

The Price is Right!

1. Of the top 10 wealthiest foundations in the United States, how many of them are Jewish?
 - a. Zero.
2. After the 2008 economic downturn, the number of foundations from 2008 to 2009 increased or decreased?
 - a. Increased by 1.3%, which was up from the 0.5% growth recorded from 2007 to 2009
3. In 2011, private contributions were higher from foundations or individuals?
 - a. Individuals gave \$211.77 billion versus foundations, which gave \$41.0 billion
4. Did giving from independent foundations increase or decrease in 2010?
 - a. Increased; the Bill & Melinda Gates foundation singlehandedly offset the sharp decrease in foundation giving in 2010.
5. In 2011, more grant dollars were given to education or human services programs?
 - a. Human services
6. Between 2009 and 2010, corporate foundations increased or decreased their giving?
 - a. Corporate foundations increased their giving by a modest 0.2%, drawing on endowments or making administrative cuts in order to keep giving rates the same.
7. In 2010 did foundations designate more money to children & youth or economically disadvantaged people?
 - a) Economically disadvantaged. \$6.2 billion was designated for organizations that help economically disadvantaged people and \$4.3 billion was earmarked for organizations that help children and youth. These two populations represent the top two most major populations that foundations focused on in 2012.
8. In 2009, the geographic distribution of assets was higher in the Northeast or the West?
 - a. The Northeast



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



9. Which foundation has more money? The Bill & Melinda Gates Foundation or the Ford Foundation?
 - a. Bill & Melinda Gates Foundation has \$37.4 billion, and the Ford Foundation has \$10.3 billion.

10. Which foundation has more money? The bill & Melinda Gates Foundation or the Ford Foundation?
 - a. Bill & Melinda Gates



Jewish United Fund/Jewish Federation
of Metropolitan Chicago



Values Clarification Activity for Philanthropy Bootcamp

- **A or B:** I would rather fund a program that supports the environment **VS** I would rather fund a program that supports the arts.
- **A or B:** I would rather fund an Israeli program **VS** I would rather fund an international program
- **Spectrum:** I would rather give to a Jewish organization that serves only Jewish clients v I would rather give to a Jewish organization that serves everyone.
- **Spectrum:** I would fund a program that benefits Arabs/Palestinians.
- **A or B:** I would fund a program that supports health/medicine **VS** I would fund a program that supports the environment.
- **Spectrum:** I would fund a program that supports co-existence between Israelis and Palestinians
- **A or B:** I would rather fund a program that serves children **VS** I would rather fund a program that serves adults.
- **A or B:** I would rather fund programs that address poverty and meeting people's basic needs **VS** I would rather fund programs that serve people like me.
- **A or B:** I would rather prevent a problem from happening **VS** I would rather prevent a problem that already exists.
- **A or B:** I would rather fund a program that supports education/school **VS** I would rather fund a program that supports extracurricular activities.
- **Spectrum:** It is important to me to fund programs that address local needs, rather than national or global needs.
- **Spectrum:** I think it is more effective to give to programs that provide higher quality services to fewer people rather than less intensive care for more people.
- **Spectrum:** I think for foundations to give one large grant rather than give several smaller grants.
- **A or B:** I would rather fund new and innovative programs **VS** I would rather fund well established and tested programs.
- **A or B:** I think foundation board members should make decisions by consensus **VS** I think foundation board members should make decisions by majority rules.
- **Spectrum:** I would not consider supporting an organization that submitted an unclear or hard to read grant proposal.