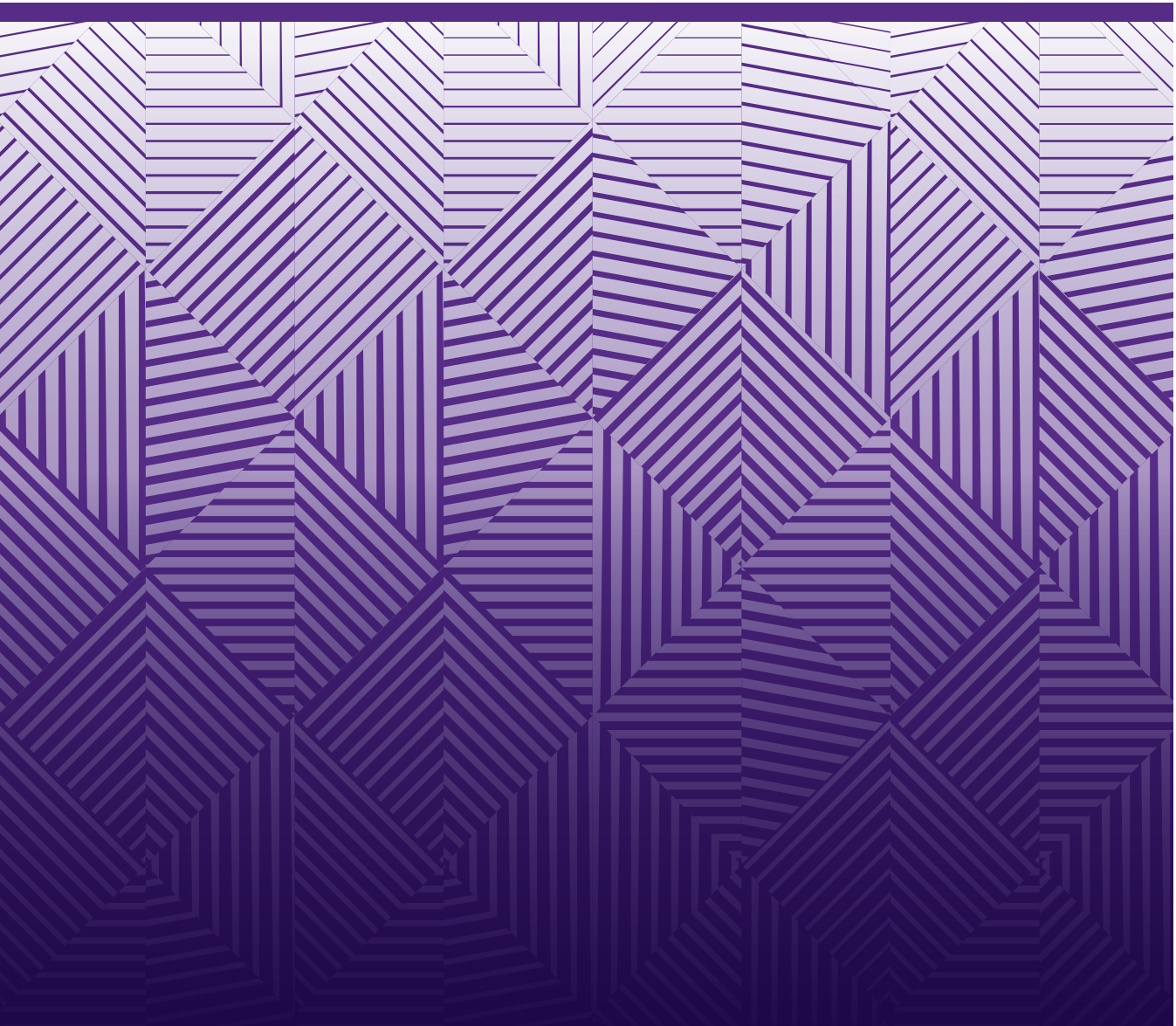


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 NYU | BRONFMAN

Making Jewish Philanthropy A Democratic Good



APPLIED RESEARCH COLLECTIVE

Lila Corwin Berman, Temple University
Matthew Berkman, Oberlin College



The Applied Research Collective for American Jewry at NYU convenes scholars and practitioners, in & beyond the Jewish community, to collaboratively develop policy and funding recommendations for Jewish foundations and organizations.

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APPLIED RESEARCH COLLECTIVE
FOR AMERICAN JEWRY

Making Jewish Philanthropy a Democratic Good

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SECTION 1

OVERVIEW

The Problem

In 1933, as the Great Depression devastated the United States, Judge Joseph Proskauer, president of New York City's Jewish federation, made the decision to empty the philanthropic institution's reserve funds. The New York State Supreme Court judge explained to the federation board, "We have distributed to the societies every dollar of available surplus which we have had and the obloquy of that, if that be obloquy, will fall on my administration, but I have counseled it with my eyes open, with a complete loyalty to the ninety-one institutions and their needs, and with the belief that in times of emergency like these Federation should take every chance in order to keep the ninety-one institutions functioning."¹

Today, we know all too well that crisis makes a mockery of business as usual. But crisis also has a strange way of reinforcing certain norms. For Proskauer, spending down his federation's surplus may have been a risky move, but it was also one that affirmed the institution's values. Indeed, New York's federation had written into its founding bylaws over a decade earlier a prohibition against holding excessive reserve funds. To the donors who supported it and the agencies that relied upon it, federation had maintained its commitment to distributing the bulk of its funds each and every year.²

Now, as we confront a crisis ravaging both bodies and economies, we similarly are witnessing a curious mix of values toppled and sustained. The pandemic has compelled many Jewish funders to commit themselves to starkly new priorities, but it has also reinforced some of the core behaviors and practices that defined late twentieth and early twenty-first century Jewish philanthropy. Nowhere is this strange dynamic of rupture and continuity more evident than in how today's Jewish philanthropic organizations, even as they are nimbly adapting to meet the moment, persist in practices that place philanthropy at odds with democracy.

Indeed, as cataclysmic as today's crisis is it also highlights a longstanding tension between democracy and philanthropy. Consider two competing narratives about the role of philanthropy in upholding the values core to a democracy. In one, philanthropy nourishes the broad public, revitalizing democratic institutions, strengthening civics education, and amplifying the voices of underrepresented groups. In the other, philanthropy erodes democracy, eclipsing government as the guardian of the public good, imposing elite priorities, and deepening economic divides. While the first builds a case for the value of philanthropy to democracy, the second pits one against the other.

The pandemic, by fueling both the impulse to rely on past practice and the necessity to move in new directions, presents Jewish philanthropy with a choice. The goal of this proposal is to recommend ways to redirect the course of American Jewish communal institutions away from the second narrative—in which philanthropy appears to be on a crash course with democracy. Should the sector continue along its current trajectory, one marked by ever higher levels of capital accumulation, with control devolving to fewer and fewer individuals,

then it will remain perilously at odds with the very ideals of democracy that have fostered a vibrant American Jewish community in the first place.

Here, we concern ourselves with two aims that are related but not identical: first, to suggest how philanthropic institutions could advance the goal of fostering a more robust and informed democratic public; and, second, to propose a strategy for how philanthropic practices could more powerfully reflect democratic values.

The institutions and leaders that constitute the field of American Jewish philanthropy have a vested interest in safeguarding a healthy democracy that serves the vast majority of Americans. As the current political moment reveals, when more Americans feel disenfranchised and powerless to change the course of American political and economic life, they turn to alternatives that can be deeply—even, violently—harmful to minorities, civil liberties, and fundamental democratic ideals. Philanthropic institutions that amass private resources and public benefits but skirt the process of public consent and legitimacy not only fuel brewing resentments, but far more consequentially, diminish faith in democratic solutions to collective problems: if a private few outside of public channels are calling the shots, democratic institutions appear enfeebled and irrelevant.

The coda to the story of Judge Proskauer and the New York federation is that it took not a crisis, but the aftermath of one, for the long-held value against holding large reserve funds to crumble. In the post-World War II era, the New York federation abandoned its bylaw against holding excessive reserves, instead committing itself to building emergency funds and endowments larger than its founders could have imagined. Ironically, as they

worked to transform their spending culture, some federation leaders harkened back to the Great Depression as a lesson about the importance of storing capital in reserve, despite the fact Judge Proskauer had drawn the very opposite lesson.


The pandemic crisis, which rages as we write, may offer future lessons which we can now only barely intuit. But our aim is to begin to clear a pathway toward a new world, where resources are distributed in a more just and responsible way for the good of Jews, for the good of the American public, for the good of our democracy, and for the good of our world.

Point of Arrival


If American Jews believe that both private philanthropy and a democratic public culture are necessary to the ongoing vitality of Jewish life in the United States, then it is imperative that they stand on the front lines of efforts to reform philanthropic institutions so as to bring those institutions into greater alignment with the tools and values of democracy. Whether the end goal is to improve the functioning of American Jewish philanthropy, to strengthen American democracy, or some combination of the two, the path forward requires a simultaneous reckoning with both public and private values and practices. Only a fundamental rethinking of the knowledge base informing Jewish philanthropy, as well as its distributional practices and capital strategies, can equip Jewish institutions to nourish the kind of democracy that will, in turn, foster a secure and vibrant American Jewish communal life.

A critic may ask why American Jewish philanthropy should be concerned with the state of American democracy. Wouldn't it be better to build the most well-capitalized, efficient, and effective system of American Jewish philanthropy, and leave the business of democracy to the experts? Or, better yet, to the voters? This kind of single-lane approach might be sensible were it not for the historical fact that democracy and philanthropy have been inextricably bound together in their development in the United States. In fact, the very way the philanthropic system works—from its legal status and tax exemptions to the rules governing what it can and cannot say about elections and politics—is entangled with the way that democracy has evolved over the last century.

The option of staying a narrow course is simply unavailable: Jewish philanthropy is part of a broad American political landscape, where philanthropic decision-making affects politics and politics shapes philanthropic choices. The health of American democracy is inseparable from the health of American Jewish philanthropy.



The health of American democracy is inseparable from the health of American Jewish philanthropy.



Jewish philanthropy's stakeholders include all American Jews, defined capaciously to include non-Jewish partners and neighbors.

Landscape

Reforming American Jewish philanthropy requires the involvement of a broad array of participants, including individuals, institutions, and the American state.

Individuals:

From the participants in donor-funded programs to individuals who are excluded from programs for any number of reasons, the individual dimensions of Jewish philanthropy extend far beyond the donors themselves. Jewish philanthropy's stakeholders include all American Jews, defined capaciously to include non-Jewish partners and neighbors. Furthermore, because few American Jews operate in purely Jewish contexts, the individual stakeholders may also include the members of communities that in some way intersect with Jewish ones.

Institutions:

The institutions of Jewish philanthropy range from funders (including federations, community foundations, and private family foundations) to operating agencies (including foundations and other nonprofit organizations) to service providers (nonprofits that receive grants from funders to perform specific work).

The American State:

Finally, American Jewish philanthropy operates in a political and economic landscape structured by the American state, which includes the elected and non-elected bodies that create and enforce policy. It is accurate to say that philanthropy is an extension of the American state and that Jewish philanthropy is, thus, embedded in the state. As such, it would be impossible to effect substantial change within Jewish (or, more generally, American) philanthropy without also considering reforms at the level of American law and policy.

A Strategy with Three Nodes: Knowledge, Participation, and Spending

Knowledge: How to Imagine Change?

For American Jewish philanthropy to secure and strengthen democracy, it must embrace the practices of critical reflection. Healthy democracies rely on educated publics that have access to information and a range of interpretive and analytical tools.

To date, the preponderance of research about American Jewish philanthropy has been of an applied nature: isolated data-gathering projects to determine whether a specific initiative is achieving its desired outcomes. Sometimes, that same research does double duty as a form of boosterism, part of a public relations campaign to validate the project or philanthropic endeavor. While this kind of research is valuable and public relations campaigns are important for spreading the word about successful programs, research of this sort is not a replacement for basic research that can shift knowledge paradigms. The general public is woefully uninformed about philanthropy, including Jewish philanthropy. Aside from reading about periodic scandals that hit the press, Americans have few tools to consider the history, purpose, and responsibility of philanthropy.

The first node of our proposal maintains that the American Jewish philanthropic sector should invest in basic research about Jewish philanthropy with the objective to promote critical reflection on the field's core assumptions and with the goal of using deep historical, textual, and data-driven research to contextualize existing paradigms and, if necessary, advance new ones. By investing in an independent

scholarly enterprise devoted to the study of Jewish philanthropy, the sector will intentionally relinquish control over the questions asked, the archives and data consulted, or the texts and traditions mined. Different from the directed research projects that survey program participants or measure the results of a specific strategy, a **Center for the Study of Jewish Philanthropy** will yield benefits in the form of new knowledge produced and disseminated. Scholars affiliated with it will produce deeply-sourced research about trends, historical legacies, and modes of American-Jewish philanthropy. Moreover, such a center will advance the project of building an informed and educated public, capable of better understanding vitally important institutions, policies, and histories; in other words, it will help invigorate a robust civic sector essential to democracy.

Broad Participation: How To Make Change

Over the last half century, the power structure of American Jewish philanthropy has narrowed significantly. Mirroring broader trends in American political and economic life, American Jewish philanthropy's wealth is increasingly concentrated in private family foundations or donor-advised funds. Even federations, ostensibly community-controlled entities, hold restricted endowments that far exceed their annual campaigns and unrestricted funds. This state of affairs hinders the ability of the system to function in a democratic way, with the input of the public it purports to serve and with an effort to distribute power to

more than a small minority of that public. Large donors have gained the ability to set the agenda for entire communities, while smaller donors, as well as general community members, have lost any confidence that their voices matter when it comes to decisions that affect them.

On the broadest level, despite the fact that the American public has invested heavily in the philanthropic system—through tax exemptions and deductions—only a miniscule segment of the population exerts any control over philanthropic allocations. Other philanthropic entities grappling with the ramifications of this increasingly unequal distribution of power and capital have begun to experiment with **participatory grantmaking**, a set of targeted and holistic approaches for integrating a wider range of voices into philanthropic decision-making processes. Accordingly, the second node of this proposal involves educating Jewish philanthropic institutions about grantmaking methods that broaden participation and persuading them that adopting such methods is a prerequisite of functioning within a democratic framework.

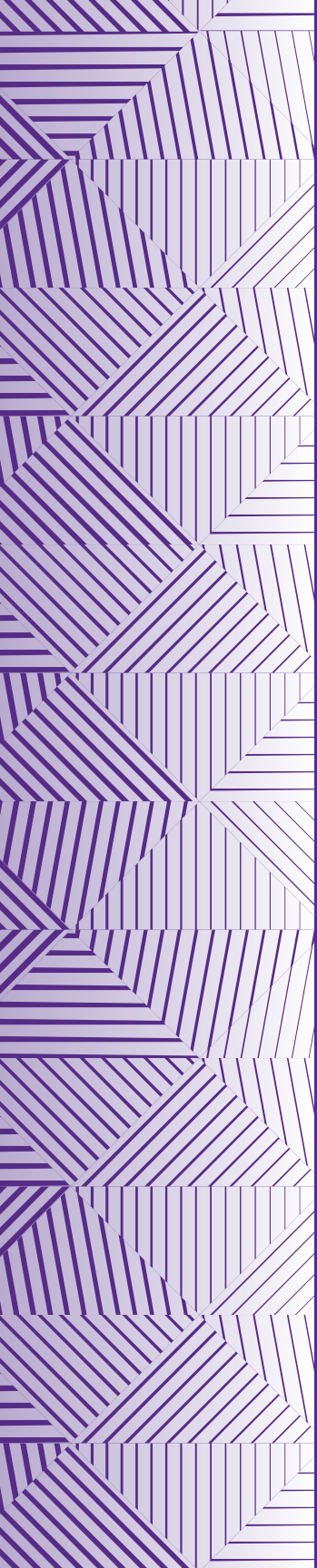
Spending: How To Fund Change?

New forms of knowledge and efforts to engage a broader range of community members in the grantmaking process will only have tangible effects if the Jewish philanthropic sector addresses its capital practices. As it stands, since the late 1960s, Jewish philanthropic entities have increasingly embraced the techniques of endowment and capital accumulation. While not the cause of the country's mounting economic inequalities, these practices nonetheless participate in this alarming trend.³

Any effort to align Jewish philanthropy more closely with the values of democracy will need to confront the question of how philanthropic capital circulates. It is not sufficient for philanthropic organizations or individual donors simply to pledge to spend more money in a bounded period of time (a strategy familiar from the Giving Pledge) or to earmark a certain percentage of philanthropic spending to Jewish causes (a strategy advanced in the Jewish Future Pledge). Rather, those players will need to spend differently, as suggested by the second node of this proposal.⁴

To spend differently will require a number of shifts in the culture of philanthropy. These include: recognizing that a significant percentage of philanthropic capital comes from public sources (via tax benefits) and assessing how those public expenditures meaningfully serve the public interest; involving a broader swath of the community in spending decisions; investing in research to determine whether policies that favor capital accumulation (such as endowment building) are always the best ones; and setting goals for circulating capital in new ways that move more money more rapidly into the hands of those in need, from low-interest loans (such as those offered by the Hebrew Free Loan Society) to higher overall spending commitments to advocating for new rules governing donor-advised funds and other tax-preferred philanthropic vehicles.⁵

This final node of our strategy to strengthen Jewish philanthropy's contribution to democracy is both embedded in the prior two nodes and, in addition, requires deeper research and discussion of United States government policies that exceed this paper's scope.



SECTION 2

KNOWLEDGE: A Center for the Study of Jewish Philanthropy

Introduction

Healthy democracies require systems of self-knowledge and critical reflection—from investigative journalism to universities and publicly-funded research institutes—in order to retain their vitality and serve a broad public. Yet, despite the fact that Americans give more to charity per capita than any other country’s population, and despite the fact that countless American institutions rely on philanthropy, the American public is strikingly uninformed about philanthropy. American Jews share a similar profile of high giving rates, high levels of exposure to philanthropically-funded programs and institutions, and yet remarkably shallow knowledge about philanthropy. This state of affairs not only depletes the public’s ability to make informed decisions about the world in which it operates but also makes it prone to uncritically accepting sensationalized stories, whether of the unvarnished good or irredeemable bad, about philanthropy.⁶

To remedy the dearth of knowledge about such a central subject to American Jewish life, we propose the creation of a Center for the Study of Jewish Philanthropy. This endeavor would enable Jewish philanthropy to see itself in new light, refracted through a range of Jewish and non-Jewish histories, texts, and traditions. It would also provide needed ventilation for what is today a relatively closed system of knowledge, exposing it to new ideas and paradigms across space, time, and scale. The type of research we envision, among other things, highlights the field's embeddedness in multiple narratives and frameworks, from economic to cultural to political to spiritual ones. Finally, a Center for the Study of Jewish philanthropy would help bolster robust and critically-driven conversations about American civic society necessary to a strong democracy.

Historical Background

Before considering potential models for a Jewish philanthropy research center, we should briefly acquaint ourselves with the history of “the serious study of philanthropy,” as Princeton historian Stanley Katz has termed it.⁷ There is some debate over where that story begins. Some suggest looking to scholar-practitioners of social work from the turn of the twentieth century; others point to the groups that formed around University of Wisconsin historian Merle Curti at mid-century. Wherever we start, it seems clear that the institutionalization of this line of research truly began with the creation of the Program on Nonprofit Organizations (PONPO) at Yale University.

PONPO was established in the late 1970s, with an initial gift from John D. Rockefeller, III. It was born out of the Commission on Private Philanthropy and

The type of research we envision, among other things, highlights the field's embeddedness in multiple narratives and frameworks, from economic to cultural to political to spiritual ones.

Public Needs (the Filer Commission), also funded by Rockefeller, which brought together a wide assortment of scholars in the face of mounting Congressional scrutiny of nonprofits, to provide a more substantial research base to meet the critics. The initial impetus for a nonprofit research center at Yale had come from the University's president, Kingman Brewster, and was developed by political scientist Charles Lindbloom and law school professor John Simon, who was also the president of the progressive Taconic Foundation and who would serve as PONPO's first director.

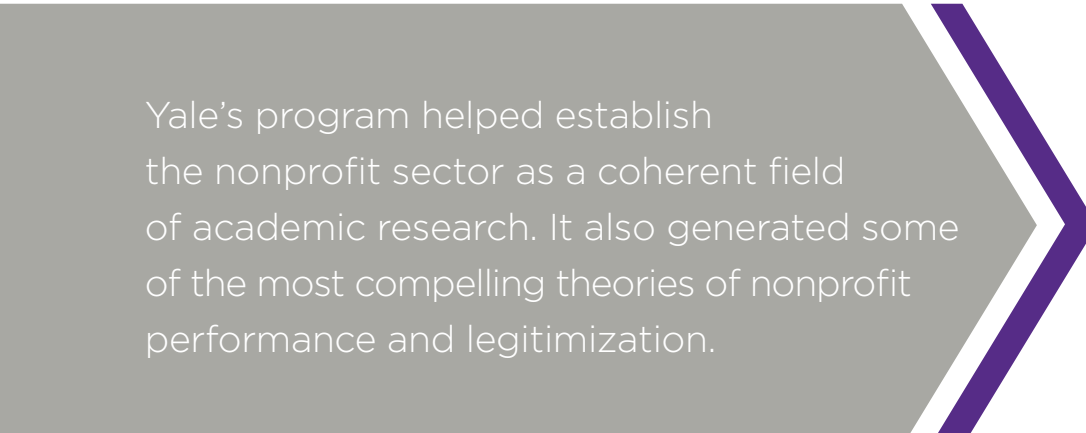
The center began with an idea: that it was necessary to define and understand the nonprofit sector as an entity. It encountered some initial difficulty raising funds due to concerns that the center's research would be too theoretical and not tethered to practical policy formulations. In 1980, the emergence of Independent Sector, a nonprofit advocacy and trade organization that assumed the task of near-term policy research, left PONPO freer to address theoretical, philosophical, and longer-term questions related to nonprofits—and

to raise additional funds. Yet, as one of its earliest participants writes, “Pressures to pursue a more focused research agenda—one that would yield ‘useful’ results and contribute to the sector’s advocacy concerns—were unremitting.”⁸

Yale’s program helped establish the nonprofit sector as a coherent field of academic research. It also generated some of the most compelling theories of nonprofit performance and legitimization. With its own building on Yale’s campus, PONPO attracted some of the country’s leading thinkers on nonprofits, including Peter Dobkin Hall, Paul DiMaggio, and Henry Hansmann. Other scholars, like historian Stanley Katz, were frequent visitors, and a small cohort of graduate students also attended PONPO seminars, creating a sense of scholarly community. Although it continuously struggled for funding, the scholarship

produced in affiliation with the center was some of the most important of the last half century. (In 2002, PONPO was taken over by Yale’s School of Management and transformed into the Nonprofit Management Center, a development that mirrors recent trends in the academic study of philanthropy away from basic research and towards a more management-oriented focus).⁹

Soon after PONPO’s founding, a number of other universities established similar research centers, though none matched PONPO in terms of scholarly output or status. At the same time, a number of schools began to develop programs in nonprofit management to help train and certify nonprofit practitioners. By 1990, 17 universities offered a graduate concentration in nonprofit management, and by 2000 the number had increased to 91.¹⁰



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The State of the Field: Philanthropy Research Centers and Jewish Philanthropy

With this history as our backdrop, we offer a number of observations about the current state of research on philanthropy and nonprofits that inform how we understand the purpose of the proposed Center for the Study of Jewish Philanthropy.

Core Trends

There has indeed been an impressive growth in academic institutions devoted to nonprofits and philanthropy over the last several decades. Nonprofit and Philanthropy Studies is a thriving field. But it is also the case that the vast majority of these academic centers are:

- > Management-focused
- > Heavily influenced by economics and public administration as the primary disciplinary approaches
- > Generally underinvested in humanistic approaches (history, sociology, religious studies, etc.) to inform their research apparatus
- > Focused more on nonprofits than on philanthropy (i.e., on the performance of nonprofit institutions, rather than on the voluntary giving of individuals).

The Center for the Study of Jewish Philanthropy envisioned by this proposal would push back against these trends, instead drawing on a set of tools, approaches, and participants that would boldly distinguish it from existing programs in Jewish nonprofit management, like those at Brandeis and NYU, which tend to embody the core characteristics described above.

Models

The proposed research center would stake out new territory in the study of both Jewish philanthropy and philanthropy more generally. However, it would not be alone in this task. Indeed, we can identify several models from different academic institutions that have a strong humanistic bent; that focus as much on philanthropy as on nonprofits; and that take as their central task engaging public and scholarly discourse rather than training new cohorts of nonprofit practitioners. A Center for the Study of Jewish Philanthropy would quickly become a peer institution among these centers and join their efforts to reorient the study of philanthropy along new axes of knowledge.

The following pages highlight the most salient features of two such centers, chosen because of their national status as leading institutes of philanthropy research, and because they each have a specialized focus that roughly parallels that of our proposed center for the study of Jewish philanthropy: The Lilly Family School of Philanthropy at Indiana University-Purdue University Indianapolis, which has a special focus on religious giving, and the Stanford Center on Philanthropy and Civil Society (PACS), the leading academic institution focusing on issues related to digital culture, internet technology, and philanthropy.¹¹

In considering these institutions as models, we discuss **1.** how the institution balances commitments to the scholarly community with commitments to practitioners of philanthropy; **2.** how it interacts with the broader field of nonprofit and philanthropy studies; **3.** how it utilizes the resources of the university in which it is housed; **4.** how it structures its relationship with funders; **5.** what resources it offers students; and **6.** what strategies it developed for disseminating research products.

The Lilly Family School of Philanthropy—Field Building, Research, and Training

Background

The most significant institution devoted to the academic study of philanthropy in the U.S. is the Lilly Family School of Philanthropy. Established in 2012, Lilly emerged out of the Center on Philanthropy at Indiana University-Purdue University Indianapolis (IUPUI), which was created in 1987 when a San Francisco-based school for fundraising was relocated to Indiana. Lilly now claims almost two dozen core faculty, with an additional 46 affiliates. IUPUI was a trailblazer, establishing the field of philanthropic studies; the first bachelor's, master's, and Ph.D. degree programs in the field; and the nation's first endowed chair in philanthropy. Much of the early work done at IUPUI was geared toward **field-building**—that is, making nonprofit and philanthropy studies (NPS) into a recognized and coherent academic discipline that would allow the credentialing of scholars and practitioners.

Like the earlier Center, the School of Philanthropy was established with a dual aim: to increase research and knowledge about philanthropy and nonprofits, and to train cohorts of philanthropic and nonprofit practitioners. This created a strong bias towards applied research, which initially led to concerns about the quality of the School's research and, eventually, to the creation of a peer review committee for research. Nonetheless, in the past, Lilly has facilitated some of the most important humanistic and social scientific scholarship in the field, in no small part by providing resources to leading humanities scholars of philanthropy.

Likewise, the School's collaboration with Indiana University Press on its "Philanthropic Studies" book series has generated some of the most important work on the history of philanthropy in recent decades (the series has recently been discontinued).

The output of the Lilly Family School includes

- > **Training:** A graduate program that awards between 40 and 60 degrees a year and funds faculty grants and dissertation fellowships;
- > **Reports:**
 - *Giving USA*, the go-to source for analysis of data on charitable giving;
 - Periodic studies of high-net-worth individuals and their philanthropic behavior;
 - A listing of all philanthropic gifts over one million dollars;
- > **Research:**
 - Initiatives on women's philanthropy, disaster giving, and remittances, as well as a number of global philanthropy indices;
 - Research centers—see below;
- > **Consultation:** Contract research for nonprofits, including evaluations, trainings, and targeted research;
- > **Resources:** One of the country's most comprehensive philanthropic studies libraries.

Funding

One of the most important dimensions of the Lilly Family School's development over the last decades has been its close relationship with Indianapolis' Lilly Endowment (now the second largest private foundation in the country) and Eli Lilly and Company. The Endowment funded a feasibility study when the San Francisco-based fundraising school was considering relocation to IUPUI and then served as the Center's sole source of funding in the initial years following its creation. In 2006, the Endowment made a \$40 million grant to the Center to help establish an endowment that would cover a portion of its operating costs. By that point, the Center had attracted additional funders, and Lilly Endowment funding represented only about a fifth of its total budget. Over its first two decades, the Endowment gave approximately \$84 million to the Center and the School, highlighting the value of a close relationship with a locally-based anchor funder.

The Lilly Family School also houses several research centers whose experiences may be instructive in envisioning a Center for the Study of Jewish Philanthropy.

Lake Institute on Faith and Giving. The Institute was established in 2002, with a \$5 million gift honoring the memory of Tom Lake and his wife Marjorie Lytle. Lake served as president of Eli Lilly and Company and as the long-serving chairman of the Lilly Endowment. The Institute has ties to IUPUI's School of Liberal Arts and Department of Religious Studies.¹² Lake's founders noted that, although donations to religious institutions had long been the predominant form of giving for Americans, the scholarship on philanthropy tended to focus to a far greater degree on secular

forms of giving (especially giving associated with the largest private foundations). One of the main motivations for the creation of the Institute was to "legitimize the study of faith and giving as a serious academic inquiry and help attract talented scholars and researchers to the field."¹³ This meant that the Institute would largely forgo a critical orientation towards religious giving in favor of a more promotional one.

The Institute's founders also wanted to establish as expansive a research agenda as possible, choosing the terms "faith" (as opposed to religion) and "giving" (as opposed to charity) to signal the institution's broad scope and nondenominational and interfaith mission. To secure its status and guide its work, the Institute established an advisory board of leading religious scholars and faith leaders soon after its founding.

Like the Lilly Family School more generally, the Lake Institute combines educational offerings for students with professional development for practitioners (including an executive certificate in religious fundraising) and public programming. The latter includes an annual lecture series (the most recent speaker was David Brooks) and smaller programs featuring local and national religious leaders. The Institute also convenes scholarly working groups; offers a one-year dissertation fellowship; publishes a biweekly newsletter on faith and giving; and sponsors and conducts original research on faith and giving, including the National Study of Congregations' Economic Practices, the largest and most comprehensive study of U.S. congregations' finances.

Muslim Philanthropy Initiative (MPI): Formed in 2017 as a joint initiative of the Lake Institute and the Lilly Family School’s dean’s office, MPI “seeks to further research in this under-studied area” by helping to “develop thought leadership, frame conversations, and train philanthropic and nonprofit leaders within Muslim philanthropy.” In addition, MPI works “to educate the broader public, media, public officials, and the public about Muslim philanthropy through empirical, high-quality research.”¹⁴

Significantly, MPI aims not merely to train practitioners and encourage scholarship but to enhance **public understanding** of Muslim philanthropy and giving practices. While the Lilly Family School also seeks to engage the public, this task takes on a particular urgency for MPI, one that is clearly motivated by what its leaders consider misinformed or biased conceptions of Muslim philanthropy circulating in the media and general public. Of course, this undeniably important function sits in tension with the more critical function that research centers of this sort might play vis-à-vis the theory and practice of contemporary philanthropy.

Another distinguishing characteristic of MPI is its close collaboration with the Center on Muslim Philanthropy (CMP), a separate 501c3 organization established by one of the founders of MPI (and a current Lilly Family School professor). CMP was established as a separate entity in part to address funding issues related to zakat, Islamic laws of charity. Collaboration between the two offers a model of an academic center working in close partnership with non-academic research and advocacy institutions.

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On the research end, MPI publishes the *Journal of Muslim Philanthropy and Civil Society*, a bi-annual, peer reviewed, open access journal, as well as the Muslim Philanthropy and Civil Society book series with Indiana University Press. It also runs an annual symposium on Muslim philanthropy and civil society at the Lilly Family School and is currently working with the IUPUI library to create the Muslim Philanthropy, Nonprofit, and Civic Archives. In terms of engaging practitioners, MPI offers training and professional development to Muslim nonprofits and hosts an initiative that fosters collaboration among Muslim organizations in Illinois, Michigan, Minnesota, Indiana, California, and Washington, DC.

The MPI clearly benefits from its ability to make use of the resources and status of the Lilly Family School. But it has also benefited from the exceptional nature of its focus. As the first major academic institutions to study Muslim philanthropy in the United States, MPI became a natural convener for research and programming on the topic. Its existence alone has helped to galvanize a subfield and drawn into its orbit a wide-ranging group of scholars and practitioners. In this sense, it presents an attractive model for a Center for the Study of Jewish Philanthropy.

Stanford Center on Philanthropy and Civil Society (PACS)— Engaged Scholarship and Engaged Funders

The other renowned academic center for the study of philanthropy is the Stanford Center on Philanthropy and Civil Society (PACS). Established in 2006, PACS is part of Stanford's School of Humanities and Sciences and its Institute for Research in the Social Sciences, where it serves as "a university-wide center with interdisciplinary networks and collaborations." Aspiring to engage both elite philanthropy and civil society more broadly, PACS' aims are threefold: to expand the quality and reach of research on philanthropy, civil society, and social innovation; to enhance the pool of scholars, practitioners, and leaders in philanthropy and civil society; and to improve the practice and effectiveness of philanthropy and social innovation.¹⁵ Its focus on "social innovation" signals a subtle difference from the Lilly Family School: PACS maintains an affinity with a particular approach to philanthropic practice, one associated with Silicon Valley and high-tech philanthropy, which foregrounds technology-based approaches, innovation and entrepreneurship.

PACS is likely the most prestigious of any of the current research centers dedicated to the study of philanthropy. Its stature is due not only to its association with Stanford but also to its association with a number of high-profile Bay Area philanthropists. One of PACS' founders was Laura Arrillaga-Andreessen, a prominent Bay Area philanthropist who also teaches courses at Stanford. Paul Brest, one of the current co-directors, is the past dean of Stanford Law School and past president of the William and Flora Hewlett Foundation. As such, PACS has long had a complex and delicate relationship with Silicon

Valley philanthropy: funded by it, informed by it, and dedicated to shaping its practice, but also committed to maintaining a critical distance from it. For instance, Rob Reich, the other co-director, is one of the leading critics of tech philanthropy in the nation.¹⁶

Because the same tricky balance between critical scholarship and engagement with the funding landscape would likely define a Center for the Study of Jewish Philanthropy, PACS may offer a particularly useful model. (There are a range of views regarding how successfully PACS has actually struck this balance.) For example, one tactic the founders of PACS highlight as being critical to sustaining this balance is their decision not to establish a formal board of directors with power over the center's policies, but rather to create an advisory board including prominent area philanthropists that is tasked with making suggestions and assisting with fundraising but that enjoys no formal governance authority.

A second facet of PACS worth learning from is its embeddedness within Stanford, a university with incredible talent and treasure. Its physical location within the law school (it does not have its own building) gives PACS easy access to a large pool of scholars, students, and visitors, all of whom create a dynamic and intellectually fecund environment for its work. One of PACS' earliest efforts was to cultivate a corps of graduate students through one-year fellowships and, eventually, a post-doctoral position. These programs have attracted fellows from a multitude of disciplines, including Sociology, Political Science, Philosophy, Psychology, History, and Engineering.

The graduate and undergraduate courses PACs offers combine theoretical and practical approaches, and include topics like Philanthropy and Civil Society, Digital Security, Impact Investing, and Strategic Management of Nonprofits. Over time, many of the students (both graduate and undergraduate) who have passed through its programs have taken jobs at nonprofits and philanthropic institutions, creating a network of relationships. These features raise important questions for our proposed Center for the Study of Jewish Philanthropy: namely, what benefits would it gain from the particular university that houses it, and what benefits could it offer the students of that university?

Ultimately, PACS has succeeded in fostering an impressive scholarly community that is well aligned with its funders and alumni. PACS takes seriously its public role, modeling a form of engaged public scholarship that, at its best, can satisfy both scholars and lay audiences. It hosts high-profile conferences and talks, including a biannual Philanthropy Innovation Summit that attracts some of the leading figures in the sector.¹⁷ These convenings are decidedly non-academic in style and approach, although scholars do participate and often play a formative role in shaping the conversation.

Taking its cue from Stanford's research profile and from Silicon Valley more broadly, PACS' research programs attempt to bridge theory and practice. For example, its Effective Philanthropy Learning

Initiative “aims to improve the knowledge of donors—and of intermediaries providing donor education and advisory services—so they can make more informed, outcome-focused decisions, thereby increasing their philanthropic impact.” Even more reflective of the landscape, its Digital Civil Society lab “investigates the challenges and opportunities facing civil society organizations in the digital age, and develops resources to help organizations use digital resources safely, ethically and effectively.”¹⁸

While PACS and its affiliates have published important research, its best-known publication is the non-academic Stanford Social Innovation Review (SSIR). Originally a publication of the university's business school, SSIR became a PACS publication in 2011 with financial assistance from a number of foundations, including Hewlett. Though not an academic journal, SSIR publishes work by many academics and serves as a vehicle for them to disseminate their ideas to an engaged public, while also featuring the work of practitioners. It also organizes and promotes events at PACS and helps define its “brand.” As such, it models how a publication and branding strategy might intersect in the context of a potential Center for the Study of Jewish Philanthropy.

In the case of Jewish philanthropy, tensions are likely to arise from the conflicting agendas of funders and more critically oriented scholars.

Conclusion

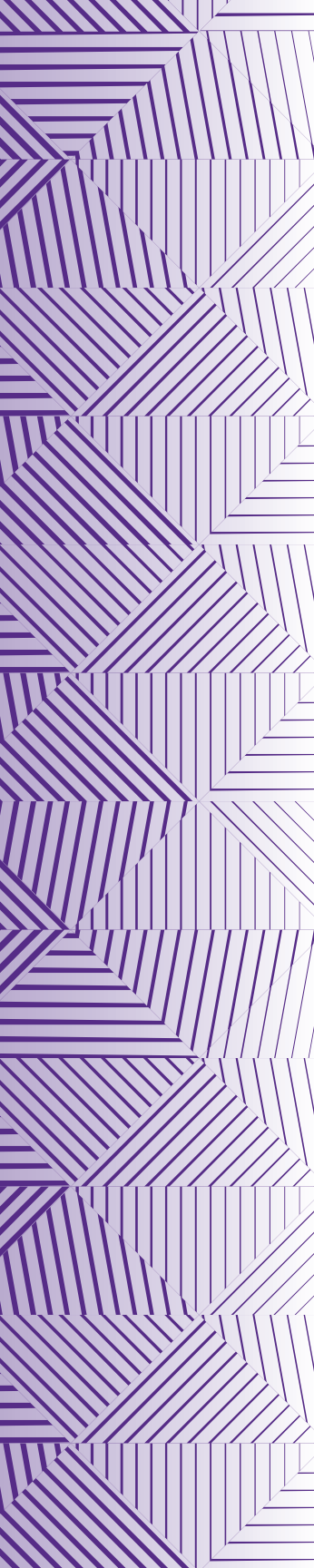
The Lilly Family School of Philanthropy, its associated institutes, and Stanford's Center on Philanthropy and Civil Society all present useful models that can inform the design of a comparable institution for the study of Jewish philanthropy.

The experiences of the Lake Institute on Faith and Giving and the Muslim Philanthropy Initiative illustrate both the possibilities and potential pitfalls of research centers dedicated to the philanthropic endeavors of religious communities. On the one hand, as the MPI demonstrates, a targeted focus concentrates the energy and enthusiasm of relevant scholarly and practice-oriented communities, furnishing resources and a prestigious venue for their dynamic interaction. On the other hand, both projects remind us of the way advocacy missions (be they political missions or missions to legitimize an academic field) can come into tension with the need for critical scrutiny of existing paradigms.

In the case of Jewish philanthropy, tensions are likely to arise from the conflicting agendas of funders and more critically oriented scholars. The advisory board model developed by Stanford's PACS, in which funders are represented and help

guide the institution without exerting top-down control over its priorities and output, might prove useful in mitigating funder-scholar tensions and ensuring that a Center for the Study of Jewish Philanthropy retains its ability to offer robust critique of the field. Among other things, PACS' experience also draws attention to the necessity of finding an institutional home for the Center that is rich in scholarly talent and resources and geographically proximate to the philanthropic institutions and practitioners the Center aims to study and inform.

Finally, as the Lake Institute and Muslim Philanthropy Initiative illustrate, seeding a Center for the Study of Jewish Philanthropy within an existing center or institute might allow for a faster timeline when it comes to the growth, visibility, and significance of a center. In the case of a Jewish philanthropy research center, it could be rewarding to locate it within a robust Jewish studies center that already has resources for scholarship (including fellowships, visiting lectures, affiliated students and faculty) and an infrastructure within which to build a new node of concentration.



SECTION 3

PARTICIPATION: Participatory Grantmaking

Introduction

As described in our previous ARC report, participatory grantmaking (PG) encompasses a spectrum of protocols designed to integrate the communities that philanthropic organizations aim to serve into the grantmaking process.¹⁹ From the standpoint of democratization, PG protocols can range in impact from (on the low-impact side) offering greater transparency to community members about top-down decision-making to (on the high-impact side) ceding most or all grantmaking decisions to a maximally inclusive and democratically structured community of interest. All high-impact forms of participatory grantmaking require funders to identify a community of interest and relinquish decision-making power to members of that community. Communities can be defined in geographic terms, in terms of shared values and interests, or both, and criteria for membership can be more or less inclusive.

We argue that PG protocols will have a more democratizing impact when it comes to the operations of philanthropy and the values it embraces **1.** the more decision-making power they relinquish to community members and **2.** the more inclusive their membership criteria are. As outlined in our earlier ARC report, we suggest that Jewish philanthropic institutions and leaders educate themselves about PG models and the ways these models, depending on how they are implemented, could transform the power structures of Jewish philanthropy by putting more authority in the hands of more people. Practical decisions about how to increase the number and diversity of stakeholders in Jewish philanthropy and through which institutions to implement PG can only be made in an informed way once philanthropic leaders clarify the value of community participation in the philanthropic process.

Models

In recent years, a small number of U.S. and international foundations have successfully experimented with high-impact forms of PG, providing field-tested, though relatively small-scale, models for how American Jewish philanthropic organizations might undertake their own experiments in democratization. The remainder of this section identifies three broad models of high-impact PG—what we call the “community board model,” the “collaborative distribution model,” and the “participatory membership model”—and offers illustrations from the field that highlight variation in the way the models can be operationalized. While some degree of staff and donor gatekeeping is inevitable, and while the degree of gatekeeping (and thus, conversely, of democratization) will

always depend on the particulars of implementation, we argue for the participatory membership model as the form of PG that holds the greatest potential for revolutionizing the way decisions about Jewish communal resources are made.

The Community Board Model

In this first model, funders recruit a board or panel of community members to make key grantmaking decisions, either autonomously or in collaboration with staff and donor representatives. Community board members are selected on the basis of their relevant experience and expertise, their commitment to the funding institution’s core values, and/or their perceived capacity to represent different demographic segments of the community (in terms of race, gender, age, place of residence, and so on).

As compared with the participatory membership model described below, the community board model is characterized by its relatively greater potential for top-down gatekeeping, which perhaps explains its status as the most popular form of high-impact PG today. That limitation notwithstanding, Jewish philanthropies looking to dip their toes into PG might consider recruiting an ideologically and demographically diverse community board as a “safe” first step in the direction of more radical democratization.

The Brooklyn Community Foundation's "Neighborhood Strength" Initiative

The Brooklyn Community Foundation (BCF), with its geographically defined community of interest, began its journey towards high-impact PG in 2014 when foundation staff and board members held a "conversation with nearly 1,000 Brooklyn residents through 30 neighborhood roundtables."²⁰ As a result of these meetings, BCF launched its "Neighborhood Strength" initiative centered on the Crown Heights neighborhood, where it subsequently held three "public visioning sessions designed to bring together diverse community voices to identify top concerns and possible solutions" to neighborhood problems. According to the foundation's website, the top concerns expressed in these visioning sessions involved the negative effects of real estate development and policing on long-term residents of color.²¹

Had BCF's leadership stopped there, its efforts to solicit community feedback would have constituted the relatively low-impact form of PG classified in our previous ARC report as "consultation." But the foundation went further, recruiting a 17-member "community advisory council" comprised of "passionate Crown Heights stakeholders" and tasking it with distributing \$100,000 in grants. According to BCF, advisory council members were recruited "either via nomination or participation in the program's community outreach events" and "represent[ed] the neighborhood's historic and racially diverse demographics."²² While the council included some unaffiliated residents, most members were NGO directors or leaders of Crown Heights community organizations.

After reviewing feedback derived from the visioning sessions, the advisory council decided to devote the \$100,000 to enhancing public space in Crown Heights, a focus it believed "would create more opportunities

for residents to continue to address shared community challenges... while building intergenerational relationships across class, race, and ethnic groups." It issued a call for grant proposals "from nonprofits and community groups... experienced in creating, providing, and advocating for spaces" and specified a set of selection criteria. BCF staff members reviewed all grant applications and recommended a set of finalists to the advisory council, which conducted in-person interviews and made final grant decisions by vote. The foundation advertised grant opportunities through traditional and social media, and also organized a "street team" to distribute flyers by hand.²³

Ultimately, the board made grants of between \$10,000 and \$30,000 to five organizations: **1.** 596 Acres, to support "stewardship preservation, and transformation of two neighborhood street lots into inclusive community spaces"; **2.** the Haiti Cultural Exchange, to support "local Haitian artists who will facilitate arts activation and programming for diverse Crown Heights residents"; **3.** New York Communities for Change, to support "community-led mobilizations for the inclusion of community voices to inform the development plan of the city-owned Bedford-Union Armory"; **4.** Bethany United Methodist Church, to support "services, workshops and cultural programming that engage residents around issues in the community"; and **5.** Repair the World, "to support increased accessibility, programming and community partnerships for the utilization and activation" of the organization's Crown Heights storefront space. BCF does not specify how it evaluated the impact of these grants.

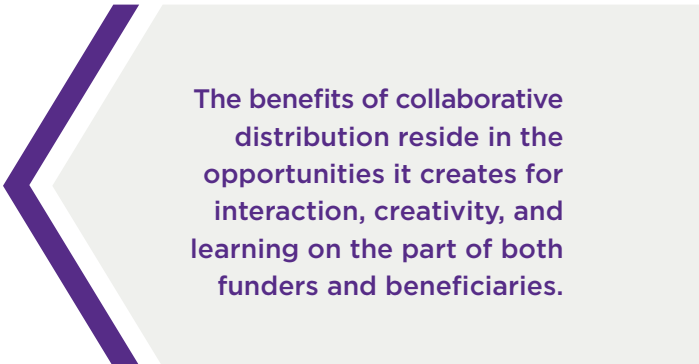
The Liberty Hill Foundation’s “Fund for Change”

The Liberty Hill Foundation, a social-justice-oriented foundation based in Los Angeles, currently uses its community board in a more advisory capacity. It thus represents a more low-impact version of the community board model. As part of Liberty Hill’s “Fund for Change” grantmaking process, the foundation appoints a “Community Funding Board” (CFB) composed of “community leaders and experts who provide strategic guidance and support.” CFB members conduct site visits and “landscape analyses” to “determine the role of each applicant [organization] within [a particular activist]

landscape to help determine final grants” and future distributions of resources across different “landscapes.” Grant proposals are “pre-approved by the [foundation’s] board of directors” and then passed on to foundation staff, who “decide final grant amounts on the basis of a rigorous CFB-managed due diligence process.” The CFB provides staff with application rankings based on site visits and landscape analysis. Candidates for CFB membership are recommended by current CFB members or foundation staff and board, or are self-nominated, and must meet the board’s diversity needs.²⁵

Collaborative Distribution Model

If the previous model enables community representatives to guide the grantmaking process, the collaborative distribution model enables beneficiaries of the grantmaking process to control allocations decisions. In this model, funders convene a group of beneficiaries and task them with distributing a fixed amount of grant money among themselves and/or for collaborative or third-party projects. While the potential for gatekeeping inherent in the funder’s selection of beneficiaries is similar to (if not greater than) that of the community board model, the benefits of collaborative distribution reside in the opportunities it creates for interaction, creativity, and learning on the part of both funders and beneficiaries.



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RSF Social Finance’s “Shared Gifting Circles”

RSF Social Finance, a philanthropy located in San Francisco, has exemplified the collaborative distribution model through its “Shared Gifting Circles” for close to a decade now. Drawing on the recommendations of existing “borrowers, grantees, donors, and investors,” RSF identifies nonprofits operating in a regionally based field and convenes them for a “day-long meeting where grantees review each other’s proposals and then allocate grants to each other based on their own knowledge and wisdom of what is needed in the field.” Participating organizations, which typically compete with one another over grant opportunities by virtue of their geographic proximity and shared area of focus, are thus encouraged to consider the needs of the field as a whole and to discover new opportunities for collaboration. Each participant receives a fixed amount of the available funding pool and is instructed to redistribute a portion of it among the other participants.²⁶

The first Shared Gifting Circle took place in San Francisco in 2011 and focused on the food and agriculture sector.

Twenty-six nonprofits were nominated by members of RSF’s “client community,” eighteen applied, and seven were ultimately chosen by RSF staff to participate in the allocation of \$50,000 in grant money. Participants were selected for “diversity in activities and approach as well as demonstrated capacity to collaborate.”²⁷ To reduce feelings of scarcity, each participant was told they would be allowed to keep \$3,143 of the \$50,000 for their own organization. Participants were then instructed to allocate \$4,000 to the other six organizations using whatever criteria they saw fit. Some distributed the funds equally and some unequally, and one participant attached a requirement for inter-organizational collaboration to her grants. Over the next several years, the Gifting Circle model was applied (with increased funding) to food and agriculture fields in Washington State, North Carolina, and Philadelphia, as well as to arts organizations in Los Angeles. The 2014 Philadelphia iteration, for example, involved twelve food and agriculture nonprofits in distributing a pool of over \$100,000.²⁸

VARIATION

The Kindle Project’s “Flow Funding” Model

The Kindle Project, a philanthropy based in New Mexico, has developed a model that it calls “Flow Funding”—“an experiential and experimental approach to philanthropy that provides community members opportunities to participate in grantmaking processes, thereby widening who influences philanthropic resources.” While they both engage beneficiaries in a collaborative allocations process, Flow Funding differs from the Gifting Circle model in terms of the scale of the cohort, the duration of the process, and the respective goals and emphases of the two funding organizations. For example, Kindle’s “Slow Pulse Flow Fund” brought together a cohort of five New Mexico based beneficiaries working in the field of gender justice for an eight-month process that

included two in-person meetings and “ongoing cohort learning via virtual platforms.” At the end of the process, the participants, called “Flow Funders,” were asked to make allocations recommendations that included but extended beyond their own organizations. According to Kindle, “the intention of the cohort [was] to create a community of learning and practice to educate, share wisdom, and provide a space to unpack the nuances of grantmaking in a shared environment.”²⁹ Similarly, Kindle’s “SpiderWeave Flow Fund” brings together all-female cohorts of four that include one “visionary donor” and three Flow Funders to support “unexpected projects, creators, and ideas” collaboratively decided by the participants.³⁰

Participatory Membership Model

From a democratization standpoint, the participatory membership model is the gold standard of high-impact PG. It entails devolving some, most, or all aspects of philanthropic decision-making to a broadly inclusive membership community, typically with the aid of an online platform. Of course, the established criteria for inclusion, the procedures governing member interactions, and the extent of decision-making power entrusted to the collective all condition how democratic the model will be upon implementation. But unlike the community board model, which operates according to a

logic of elite representation, the participatory membership model can, if properly designed, enable a potentially indefinite expansion of bottom-up participation by interested community members. Jewish federations, as representatives of geographically based Jewish communities, could establish online platforms that allow registered members of local synagogues and Jewish community groups to participate in the allocation of federation resources. Likewise, values- or mission-based Jewish philanthropies operating at the national level could do the same for a far-flung community of likeminded educators and activists.

FundAction

FundAction is a pan-European, participatory social justice fund conceived in 2016 by four foundations—the Open Society Initiative for Europe, the European Cultural Foundation, the Charles Leopold Mayer Foundation, and the Guerrilla Foundation. These foundations convened 30 activists from their respective networks who then created FundAction in 2017. With an initial budget €100,000, FundAction offers three types of grants: “Renew” grants of up to €20,000 for “new initiatives that promote systemic change”; “Rethink” grants of up to €5,000 for “collaboration, exchange and capacity building” projects; and “Resist” grants of up to €2,500 for “urgent actions.” The first two types of grants are available to FundAction members only, while the third type is available to the broader public.³¹

The core of FundAction is its online platform, Decidim, which allows members to interact with one another and participate in the grantmaking process. Grant proposals submitted by members are posted to Decidim and accessible to the broader membership for comment. Members can join “peer-to-peer review panels” that evaluate and approve grants and contribute to the oversight process. FundAction’s initial membership consisted of 45 “European activists” (broadly defined) and has since expanded to include 163 members. According to the fund’s website, it “accepts emerging and experienced activists; professionals and volunteers; and those involved in social movements or NGOs.” To become a member, one must apply and meet certain membership criteria, such as adherence to FundAction’s core values and command of the English language.³²



CASE STUDY

The day-to-day operations of the Decidim platform are managed by an eight-member Facilitation Group (FG). FundAction members nominate candidates for the FG and final decisions are made by a group of five randomly selected FundAction members and two outgoing members of the FG. While two foundation representatives sit on the FG, they do not make grant decisions. In November 2018, an external firm conducted an assessment of FundAction and found that all members surveyed “agree[d] that the funders do not exercise any control at all on the running of the fund.” Among

the more critical concerns expressed by interviewees was that membership invitations “are largely allocated through referral by existing members,” leading to the development of self-perpetuating cliques that influence the voting patterns. Similarly, while most praised the gender and ethnic diversity of the membership, some respondents noted a “class” bias towards representatives of “relatively well-established groups or organizations.” Finally, FundAction’s relatively small budget was a source of dissatisfaction.³³

The Wikimedia Foundation

With an annual grantmaking budget of around \$9 million, the Wikimedia Foundation (WMF), established in 2003 by Wikipedia founder Jimmy Wales, exists primarily to fund initiatives undertaken by Wikimedia “community members” in service of the broader Wikimedia “movement,” which encompasses a range of projects intended to make free knowledge available to the public. The foundation operates three grantmaking programs: Individual Engagement Grants (IEG), Project and Event Grants (PEG), and Annual Plan Grants. Applicants post grant proposals as publicly accessible wikis and receive feedback and endorsements from members of “the Wikimedia community,” who “discuss any concerns or questions they have on the ‘discussion

pages’ of the proposals.” Each grantmaking program is overseen by a volunteer committee of community members who “review proposals, provide feedback, and recommend a shortlist of proposals for WMF to fund.” Foundation staff then “complete due diligence on the committee’s recommended shortlist, including interviews of the applicants by the program officer,” after which “WMF finalizes the selection of grantees in discussion with the committee.” Unlike FundAction, then, WFM staff and board members have final say over grant decisions, which certainly compromises the fully participatory nature of the model. On the other hand, WFM’s pool of “community members” is far more expansive than FundAction’s membership.³⁴



VARIATION

SECTION 4

Conclusion

Well before the current pandemic, commentators across the political spectrum agreed that the United States was in the midst of a deep political and economic reckoning. Americans of all political stripes were asking whether the structures and institutions that appeared to have safeguarded democracy in the twentieth century, however imperfectly, were still serving the needs of the people, and many were expressing deep concerns about the distribution of power and resources.

The profound and unceasing human costs of the pandemic are now stretching and straining our democracy in new ways. The authors of this proposal are not alone in worrying that the current crisis might bring the already fragile state of America's democracy to a breaking point. In the history of the United States, philanthropic endeavors have bolstered public life and fostered democratic reform in myriad ways, from helping to enact protections of all kinds for vulnerable populations to establishing research, educational, and cultural institutions. Yet American history also supplies us with examples of philanthropy undermining democracy by eroding its processes and procedures. This current moment of crisis may be a point of inflection, where philanthropy commits decisively to one path instead of the other.

In this proposal we have suggested ways that Jewish philanthropic organizations can infuse democratic values into their own practices and, also, act to strengthen American democracy. Through the establishment of a Center for the Study of Jewish Philanthropy, Jewish philanthropy can support critical reflection imperative for an informed and educated public. Furthermore, by adopting the practices of participatory grantmaking, the American Jewish philanthropic sector can enact democratic values and benefit from them. In both of these ways, American Jewish philanthropy will redouble its commitment to democracy, as a tool for its own operation and as a mode for living well and justly in society.

Although here we have highlighted the knowledge and participation nodes of a strategy for using philanthropy to build a better democracy, our proposal also suggests the necessity of reforming American political and economic policy for the sake of more equitably distributing power and resources. This last component is essential to the well-being of American democracy and will demand a reevaluation of the role that philanthropy occupies within it. The problems of inequality—accelerated and amplified by the pandemic—threaten the fundamental nature of democracy.

We recommend that American Jewish philanthropic institutions recognize their stake in safeguarding a vital American democracy and align their practices and values with it.

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