>> Matan Koch: Hello everyone and welcome to the second of our leadership series. We're so excited to have you here for How Nonprofits Work with our panelists Erica Goldman, Tamar Davis and Michelle Friedman who will give more biographical information about themselves shortly. Next slide please. So before we jump into the meat, we want to give you three important logistical pointers for this series. The first is that we have live captioning and an ASL interpreter for this webinar. The ASL interpreter you can spotlight if you're having difficulty seeing. And to turn on live captioning go to the bottom of your screen and click the live transcript button if you have not. And the subtitles will come up. We are taking questions, but because this is a webinar you will not be able to ask them verbally. Please put your questions in the Q&A box. We will also be monitoring comments and questions in the Facebook live chat. Also to let you know this webinar is being recorded because it is a training series and we want this training to be available. And it will be posted to the RespectAbility website with a transcript and captions as they are cleaned up about a week from now. Next slide please. We want to thank our partners and co-promoters. I'm not going to read out this whole list, but we are so excited that this wonderful group of 15 organizations, including those represented by today's panelists, have joined us as promoters and sort of co-presenters of this series. Next slide please. And we especially want to thank our generous funders for this series - the Jewish Community Foundation of Los Angeles and the Charles and Lynn Shusterman Family Philanthropies. Without their support this series would not be possible. Additionally we want to thank the David Berg Foundation, the Beverly Foundation and the Diane & Guilford Glaser foundation for their support of our general Jewish work. Oh well, so one more thing. This is the second in a series. If you missed the first in the series, it's available at the link below, where you can also sign up for the upcoming webinars in this series. The next one being an individual development seminar on Thursday June the -- sorry Tuesday June the 29th. And the rest listed here. Again to sign up or share with other people who might be interested -- who might be interested, please go to www.respectability.org/jewish-events/. Now I believe that I can turn it over to our wonderful panelists, so let's pull down the PowerPoint and I'm going to disappear.

>> Tamar Davis: Thank you Matan, we're so excited to be here and sharing in this time together. And we hope that it will be a useful and productive hour for all of us. So my name is Tamar Davis. I am the CEO of Gateways: Access to Jewish Education. And I'm here with my wonderful colleagues - Erica Goldman, who is the director of program and operations at JPRO network, and Michelle Friedman, who is the board chair of Keshet based in Chicago. And so I'm thrilled that the three of us have had a chance to get to know each other in preparing for this wonderful webinar and to be able to see if we can share some of our knowledge and experience with you and how that might be helpful for you as you all in the audience are embarking on your future in the in the nonprofit sector and whatever that that path might look like. So the description of this webinar is really about the, you know, whether serving on a board or helping with program, how we operate and move around in the nonprofit world. And so the three of us come with different points of view and so we're going to take a couple of minutes introduce ourselves to you. And so, as I mentioned, I lead this organization that focuses on access to Jewish education for for children and teens. And my pathway into this role was twofold, I've always been a volunteer, a leader in in my Jewish passion, serving in the community. And I was working in a for-profit, you know, for a for-profit organizations before turning to working in Jewish nonprofit as staff. And then in my personal lens of working in the disability inclusion world which is what Gateways really focuses on. I am a person with a disability, I am severely hearing impaired and I'm also a parent of a child with special needs as well. So I have my personal passion and my professional experience combined to be where I am today. So that's the lens that I come to this with. And now I am thrilled to turn it over to to Michelle to introduce yourself.

>> Michelle Friedman: Thank you. I am Michelle Friedman, and I actually began my career in not-for-profit on the program side. In 1980 I worked for Access Living which was the independent living center in Chicago. In 1985, when my first son was born, I made the decision to stay at home. I wanted to be a stay-at-home mom. I happened to be -- I've been totally blind for 28 years, I was legally blind for 28 years before that. And partially sighted for seven years before that. I'll let somebody else do the math. And while staying home with my son -- while I love being home with my son, I did feel the need to do a little more to be active in the community. And I began volunteering a little bit in my synagogue. I was the Kiddush coordinator. And I liked being involved with other things than just being home and going to play group. And someone asked me if I would get involved and volunteer for the domestic violence agency in the Jewish community and I said yes which then led to a board position, and I became the development chair. And after that for the last 30 years I worked in my children's day schools, at grammar schools, and their high school, and the board. Became development chair of each of those schools, eventually the chairman of the board of the high school. The long story short I sat on nine different boards of the Chicago Jewish community as well as one outside of the Jewish community and currently am the board chair of Keshet which is truly going back to my roots and working in the disability field which is my passion: inclusion. And for me board work has been a career. I consider myself a volunteer, a professional volunteer, career volunteer. I find it meaningful and it gave me the best of both worlds where I could be at home with my children, I could make my own, you know, decisions on my schedule but also be involved and active and make a difference in the world. And that's how, you know, now at Keshet it has actually brought me back full circle. And that's really my pathway to lay leadership. And I'll pass it over to Erica.

>>Erica Goldman: Thank you. I join Michelle and Tamar in being just delighted to be here with you and talking about this. My name is Erica Goldman, my pronouns are she her. Visually I'm a middle-aged white woman with curly brown hair. And I I've had a strange career path, I had a number of jobs before ending up in the Jewish nonprofit sector. But I'll say I was working in it before I realized it was the thing. I was basically working in Jewish education. I had jobs in the Jewish community and there was a certain moment when I started to understand -- oh, the nonprofit world is a thing separate from, you know, working at McDonald's or whatever. And the Jewish nonprofit sector is a thing within that thing. And there's there are resources for people who work in the sub-sector and there are ways of people come working together within the sector and there are things that we can learn from each other. And I went to school -- I went back to school after many years not being in school. I went to get an MBA and a Master's in Jewish professional leadership, once I understood there was such a thing as Jewish professional leadership. So that was sort of my path to this moment. I'm the director of program and operations at JPRO network. And JPRO is a professional association designed to support people who work in the Jewish nonprofit sector. So it is a little bit full circle for me too that I didn't even realize that there was such a field out there as this field. And now my job is specifically to support other people's careers within that field. So it's a real joy.

>>Tamar Davis: I think that everyone who's listening or somehow participating in this webinar -- if it's not coming through your speakers, the passion is really very clear. You really don't find non-passionate people in nonprofits. Like, I think we can all agree on that. And so just for the framing of the conversation I'm sort of like gonna moderate as part of my participation on being on this panel and when Michelle, Erica and I talked about how do we kind of tackle or get our arms around this huge topic, how nonprofits work. It's a pretty daunting -- I mean, we could spend hours on this topic. But we decided to hone in on three questions that we're going to spend a little bit of time on and still allow for time at the end for Q&A. We'll still look at the Q&A in the chat and we'll see if we can answer as we go, but we'll also have some dedicated time at the end, 10 to 15 minutes at the end. So for the three questions that we wanted to really frame here -- is one -- it seemed kind of a basic question but we wanted to spend a little time on what really distinguishes a nonprofit from for-profit besides what may sound obvious, and why and how people enter the nonprofit world, which -- you heard a little bit about our personal stories, but I think there's more to share there and we all felt that way. The second question we're going to really look at is how each of us in our respective roles as a volunteer, professional volunteer, or lay leader, as a staff person, how can we serve a nonprofit in our various roles. So we'll talk about that a little bit. And then the third and a very big question in the nonprofit world certainly is talking about money: how do nonprofits operate and survive and thrive in any economic situation, and how we operate in this world. So without further ado, we'll dive right into our first question: what distinguishes nonprofit from for-profit and how do we welcome people into the nonprofit sector. So Erica, I'm going to turn it over to you to start us off with answering that.

>>Erica Goldman: Thank you. I'd love to, you know, to refer to, you know, maybe the obvious. The difference between nonprofit and for-profit. But I actually find it's not so obvious what that really means. nonprofit doesn't -- sometimes not for profit is used interchangeably with nonprofit, and I think it actually gets much closer to the real meaning. nonprofits are not, like, not allowed to make money. They absolutely have to make money. It's just where that money goes and who it ultimately benefits - that is the difference. So in a for-profit corporation or any kind of your average business that's sort of out there in the world, there are shareholders, or there are private owners who directly benefit from the money that the company makes. And that's really the goal of the company in addition to -- they're making whatever they're making. But that the bottom line is meant to make a profit for either the shareholders or the owners of the company. In a not-for-profit, still they are providing a service or doing something in service of their mission, and often making money through a number of ways that we'll talk about later. They can make a profit but that money goes directly back into the organization to make it better, to pay its employees, to expand on its mission or to further be able to deliver its mission to more people. The profits go into the service of the organization itself. So it's not nonprofit in this sort of sense that you might get of, like, you're not allowed to make any money and you have to use, you know, an old computer that's held together with duct tape. The money is just meant to further the mission of the organization as opposed to making money for the people that own it. And one more thing about that. I've mentioned now the mission a couple of times. And, like, I think we could spend the whole hour underscoring how crucial that is. Right? A not-for-profit is a mission-driven organization. Which means they have some goal about a change they want to make in the world or a service they want to provide to people and everything they do is in service of that mission. So if something comes along that seems like a good idea and might be helpful with the people or might make money or whatever, if it's not aligned with the organization's mission, mostly if it's a healthy not-for-profit they won't do it. Or they'll think really hard with their board about whether to change the mission to incorporate that work. Generally there is, like, one underlying goal and everything that the organization does is in service of that goal. And it helps make decisions, and it helps define who and what you do and how you do it. And like I said, the money that comes in and it goes straight to that. So most people who are involved with not-for-profits really feel a connection to that mission. Right? They're really there because they care about, you know, inclusion for people, or they care about people who are working for Jewish organizations, or they care about art for kids, or whatever the mission of the nonprofit is, feeding the the hungry. They're deeply connected to it. And the organization is set out specifically to meet those goals and to follow that mission.

>>Tamar Davis: I love that Erica and I completely agree with you. It's like when we talk about nonprofits being touchy-feely, warm and fuzzy. But they have to have the business model to be viable, and they have to be true to their mission. And that's so critical. So I want to flip this over to Michelle, cause I know you had your own take on this as well in terms of -- especially on how and why people enter the nonprofit world which you started touching on when you introduced yourself.

>>Michelle Friedman: Yes. So -- as I said, one of the reasons that I got involved was that I wanted to be involved in an organization that I believed in, that I cared about, that made a difference, and something that was important to me. And I didn't want to work full-time, I wanted to be home with my kids. So you know, I started out volunteering which is a great way to begin to, you know, to get involved in an organization, to find an organization whose mission you truly believe in. And volunteering is a way to get started. And a way that you could actually continue to volunteer -- that's you know -- volunteer and do one piece that you like to do. But sometimes volunteering is also a pathway to serving on a board. And a not-for-profit board is actually a critical piece of the organization, because the board is the strategic partner for the CEO, for the organization, to make sure that the organization is sustainable, can grow, is achieving their mission. And that's what I love about board work. I love being able to sit down at a boardroom table and strategize with people and make sure that what we're doing really serves the mission that we say that we're -- trying to create. And, you know, our mission to Keshet is to create a community of belonging. And we look at everything from that lens of the mission and our role is to be the fiduciaries of the organization. Make sure the organization is financially healthy, is governing -- it's a governing body, it's not a managing body. We don't get involved in the operations. Our sole role is fiduciary as board members. Making sure that we're a healthy financial organization, bringing in additional resources which sometimes people get a little, you know, a little frightened of the idea of fundraising. But fundraising is an important part of board work. But there are also other ways if you're not, you know, one of those people who doesn't like to ask or feels they don't have the capacity. There are other ways of bringing in resources to the organization, by making connections and things like that. And those are all very important parts of board work. And it's the part I happen to love and I love being, you know, being on a board. And of my entire board career I've been the only disabled person on the board and it's important to me to be able to have a voice as a disabled person, to have that perspective as a disabled person. I don't have an agenda when I come in. My agenda is to be in service of the mission because I truly believe in the mission of the organization. But my goal is to have a perspective as a disabled person and a voice. And I get that. I get that opportunity sitting on a board and being able to influence how the organization functions, and stays healthy, and grows, and serves its mission. And just, you know, for me it's been the most fulfilling aspect of working on a board and I wouldn't give it up for anything.

>>Tamar Davis: That's amazing Michelle. I love hearing you talk about it. It's really incredible. And I think something that you said before about being the strategic partner to the CEO. And it's so interesting because I think that's something even that reflects like the difference between a not-for-profit or a nonprofit and for-profit, is even in the title that we use -- where we're using -- there's more CEO and C-suite type title that we're seeing that we used to be very for-profit centric and that are also now being used in nonprofit. Because we are talking business models. We are you know creating strategic plans and thinking strategically, and looking to the board to be our thought partners in it. But I also I'm very appreciative of the point that you mentioned before as well about how many people start off and working with nonprofits is through just volunteering. Like if you're you know helping to deliver meals to people who are in need of that, or or just pitching in on a building project, or whatever it is. And that's an entry path for many many people in terms of being involved with a nonprofit or sitting on an event committee and helping to get the word out about about whatever is happening the with a nonprofit. And then that many times grows into a more of a leadership path into the organization on the volunteer kind of morphing into that lay leader title phrase or sitting on the board. And the other -- so the other piece I wanted to mention when we think about how and why people enter the nonprofit sector. So for many people it's a very conscious choice like the way Michelle you had talked about -- you had specific needs and desires that you wanted to meet in terms of balancing your personal and external life, if you will. But also for people who are really looking to -- I mean, there are business degrees and Master's programs that are specifically focused on the nonprofit sector. So people really consciously make that choice the way, Erica, you described. Like, you went back to school for training in this work. And for me I was working in a for-profit. I was working for a jewelry company and then a publishing house and then I ended up -- I was entertaining an offer from another publishing house or a nonprofit, a Jewish nonprofit organization. And that's when I made this shift into the nonprofit world. But I had a marketing degree and, you know, so some things are are replicable no matter where you work. But it was not a conscious choice at the beginning of my career. And then at some point when I was working in my first Jewish nonprofit, it became a very active choice like this is a career path for me. I want to stay in the Jewish nonprofit world because the mission speaks to me, the impact that I want to make. So there are many ways that people evolve and their relationship with nonprofit. But at the end of the day I do think regardless of whether your staff volunteer, lay leader, every single person in any community should always be in some kind of a relationship with a nonprofit in your life. And so that being said -- how can -- let's go to our next question: how can volunteers, lay leaders, and staff, in partnership, in their roles of what their their mandate is for the organization, how can we serve our nonprofit. So Michelle you kind of touched on that in the last question about the purpose of a board, where the main purpose could be a fiduciary or governing. But there are different kinds of boards. Right? Like there are different kinds of boards with different kinds of priorities. And I'd love to hear what you would say about that. Like what boards can look like.

>>Michelle Friedman: Sure. There are governing boards which is what I've always said. We're governing boards. Where we, you know, held the responsibility to our stakeholders in terms of fiduciary responsibility, in terms of policy-making and in terms of, you know, minimizing risk and being strategic about the growth and health of the organization. We, you know, on a governing board we really do not get involved in the day-to-day operations. That's up to the CEO. The only person who is accountable to the board is the CEO. And that's our job. And our job is to evaluate, hire, god forbid fire the CEO. But that's where in terms of the day-to-day, you know, we don't get involved. It's just in terms of the hire and fire of the CEO. But there is a strong partnership between the board chair and the CEO. I've always, you know, felt that that is, you know, sort of a husband wife -- whatever you want to call it, relationship. It's a strong partnership and there has to be a a trust and a understanding of each other and open communication. The other kind of board, so there are advisory boards where people with a certain skill or expertise sit on an advisory board which is not a governing board. We call it an advisory council at Keshet. Where they have a certain expertise maybe it's legal, maybe it's real estate, or you know financial expertise. And they serve as an advisor to the CEO when she -- in our case she -- is looking for some advice, needs some guidance, is looking for a direction. So they meet a couple times a year rather than quarterly like our board does and they serve more in advisory capacity. And then of course you have a philanthropic board which sometimes only does fundraising. I don't think I've ever been part of a board that didn't do fundraising at all. That's generally a significant role of a board member in some capacity or another. I happen to be a fundraiser so fundraising doesn't doesn't scare me and I know it does for a lot of people. And we talk about other ways, you know, you can make introductions. You don't have to have the capacity or the network. You can, you know, go out into the community talk about your organization, talk about the mission and make contacts that way. So there's lots of ways to be that resource builder in your organization. And I think those are kind of the three basics of of a board -- of different kinds of boards I think.

>>Tamar Davis: And Erica, I know you are going to pick up on something that Michelle is just saying now so I'm going to let you take that away.

>>Erica Goldman: [Chuckles] Totally. I see -- the idea of somebody being an ambassador for the organization is sort of a distillation of a lot of what Michelle said. And that could be an ambassador for the organization out to the public or to the community. And there's ways that you can serve a nonprofit in a volunteer capacity by being an ambassador from the community to the organization. Which is sort of the advisory part of it. So whether you're able to bring fundraising support or not or whatever there's a role to play in spreading the word about an organization, you know, whose mission that you're aligned with and who you care about. And whether that's, you know, informal networking settings and it's about actually making introductions or it's about keeping that nonprofit, you know, on the tip of your tongue so that in any kind of conversations, online or in the real world, you know, that it might mention "oh so-and-so is doing this work or you might want to connect with that," you know, they're out there just getting the name of the organization into, you know, the hearts and minds of people who might need it -- or might want to be collaborators, or might want to support it in any kind of way. And then there's this ambassadorship, you know, from the community back to the organization in terms of, you know, if the mission of the organization is to serve a particular community, they certainly need to be close to that community and hearing what do they need, how can we best serve them. This is one way that that organizations can do a better job with DEIJ: diversity, equity, inclusion, and justice, is hearing from the people. It's having advisory boards, or councils, or just committed ambassadors who are volunteers in one way or another. It could be volunteering to do actual, you know, work physical work or digital work for the organization. Or it could be volunteering to, you know, give feedback on new products, or new programs, or new services or, you know, in any kind of way. I think that nonprofit boards are really interested in hearing from the community that they serve and that they want to reach. Even, you know, give us feedback on the new website or give us like -- there's just all the ways that an individual can serve a nonprofit as an ambassador either you know looking this way or looking the other way. I think both are really important and go hand in hand.

>>Tamar Davis: And I love that, Erica, the way you talk about that. And one of the things that we actually discussed recently on the Gateways board was this triple A of a board whereas the -- one A is for ambassador which you really elaborated on. Another A is for advocacy, like really advocating what the work is of the organization and how it can help people. And then the third is the ask. Which we will unpack the money question a little bit later. But it would just remind me of that AAA of the board. But, you know, and you talked about the DEIJ, and I see this the sign interpreter is signing out the DEIJ, but you know, that we all know what it stands for. And that that sounds like maybe buzzwords of today but it is so important to have those points of view and michelle you had touched upon that earlier. Just like having that person with a disability on a board. And it's surprising, there really aren't enough people with disabilities sitting in leadership roles whether on the staff side or the lay leader side. And so we definitely need more representation in that and I would always make a big push for that. Its just so important. And also the different variety, unfortunately of disabilities that are out there, inclusion can be there for different types of disabilities but not for others. We just need to be mindful of all those voices in addition to all the very important other types of inclusion of other communities that we're not addressing specifically here. We are focusing on disability but certainly LGBTQ representation, people of color representation, all of the different representation. But the other thing that we always -- and every experience I've had working in nonprofit, we've always thought about what I'd call the four T's. And I didn't come up with that myself. I think it used to be the three T's and then we added a fourth T. But the T's that we're talking about our time, talent, treasure, and tentacles. So yes, we need a balance of different types of people on each board that can really help be those kind of strategic partners to the staff. So one is time. People have different amounts of time to give to boards and organizations and that's okay. Sometimes it's more important to have the other, you know, two or three of the other boxes checked off and that person doesn't have as much time. And that's okay because I think a big reason why some people say no to being on a board or being in that role is because they think they don't have enough time. But that's not always what we need and that's there's a balance of time that people can give. Talent, where when Michelle was talking before about advisory type boards. Like people who have finance financial expertise, people who have HR expertise, people who have a strategic thinking expertise. There's just so many different ways that people can bring their talent to the table that can round out a very robust dynamic board. And then treasure speaks for itself in a way. Yes, you want some people of capacity or at least access to network with people of capacity because that is what every organization needs. We do need funding in order to do our work and how do we access funding. But again that is a T that not everyone has and that really is okay because we need an equal balance of all 4 T's. And then tentacles is kind of a creepy way to describe it, but I think that it's very positive in this sense of who are we connected to. Like doing that community mapping exercise on board of like, which synagogue or religious institution do you affiliate with, if you have kids where do your kids go to school, if you're part of a fitness club or you know activity type of club. Any way that you socialize with other people or connect with other people, having those connections are worth a lot to organization as well. So not every board member is going to check off every T and that is absolutely fine. But you do want to have a board that represents all four T's and that is important in addition to the DEIJ that error code was referring to. And then another piece that I'll mention in the time you want to spend on this question is how staff and boards or volunteers will work with each other. And so many times on boards -- if it's more of a working board, if you will, the way Michelle had described is some of the iterations of boards that can exist, many board members will sit on a committee as part of their board service. So you sit on the finance committee, you said on the program committee, you sit on the nominating committee, that's the committee that thinks about those four T's and who's gonna come onto the board next year who's rolling off. And making sure we always have that balance. So there are different ways that boards can work with staff, not in that day-to-day but certainly in that thinking about the health of the organization. I'll just pause here if there's anything else that Michelle or Erica want to chime in on before we move to the next question.

>>Michelle Friedman: Well I was just going to add to what you just said just in terms of -- sitting on committees. The synergy, sort of, between the board and the staff is that, you know, there are board committees. We have four committees, we have a governance committee, which is what it is and also that's part of our nominating committee. And a development committee, an investment committee, and a finance committee. Each one of those committees is staffed by a staff person. So there's a synergy between the staff and the board, but not in terms of being involved in the day-to-day operations. The staff person is the resource person, is the, you know, they have the information. The board is really there to support the work of the development committee or the finance committee but not to be involved in the day-to-day operations. I just sort of wanted to put that out there. One of, you know, one of the other things about volunteering is oftentimes -- I will ask people to volunteer on a committee because I think they're going to be -- if we go through that matrix of community people who we want on a board, I look at that matrix and say well I think this person may be a good board member, let's get him on a committee, get him really engaged in the organization and then ask him to serve on the board. I could then see, you know, is he is he a good team player? Is he interested in serving on a on the board and then get him in that pipeline of leadership which is an important piece of board work -- is that pipeline of leadership. I just wanted to add that, sorry.

>>Tamar Davis: Absolutely, and thank you for for delving into that a little bit more, because I think it's really important to understand how staff and volunteers or leaders or board members really can interact in a very meaningful way throughout the course of a year. So I'm going to move on to the last question that we wanted to unpack together and that is money, the big ticket question. And really thinking about budget -- what the operating budget is of an organization and how fundraising -- and we use the word development a lot when we talk about fundraising in nonprofits, so when you hear, like Michelle just mentioned, the development committee, that's really talking about fundraising. And so let's just spend a few minutes talking about that, so Michelle I'm going to turn it over to you to start us off on that.

>>Michelle Friedman: Well, the board has an obligation to, you know, ensure the health and financial health of the organization. So we are an integral piece of that. And overseeing the budget and being involved in the budget and the board actually approves the budget the annual budget. And it's you know the finance -- I mean the CFO and the CEO. All those people are involved in the process, but it is actually the board's role to approve a budget and then to oversee and make sure that that budget is, you know, in line with the mission, that we're not, you know -- if a program isn't in line with the mission anymore that perhaps it's time to, you know, to move that program out and look at another program. But that's an important piece and the, you know, the other important piece of the financial piece of the board's role is that fundraising role and ensuring through foundations through however, you know, however you have the tentacles the reach the network. Even if you have your own capacity. I'm not somebody who has a significant amount of capacity. I have all those other T's and I use those other T's. Treasure, I give what I can and I make Keshet one of my top giving, but I don't have the significant capacity that other people do. But I have a lot of connections and I have a lot of outreach and I use that outreach as my way of bringing in the resources to the organization. So, but money that's an important role and the oversight of the budget and the financial resources are a critical piece of board work.

>>Tamar Davis: Absolutely. It is so important. I think Michelle, you really tapped on something that I think should be a key strategy for any development director or development committee, especially with their board -- is asking board members to make that organization that of which they are a board member, to make it one of their philanthropic priorities. And that's not to say that -- that's not speaking to the size of the gift necessarily. It's really speaking to the size of your giving in relation to other places where you give. And it's also not saying you shouldn't be giving to other places as well. Like, there is so much need out there, there are so many things that are close to our hearts. But this is where we're choosing to spend some time, and so when you're serving on that board to really consider that organization to be one of your philanthropic priorities. And that can manifest in several ways. But I do want to talk a little bit more also about, you know, we talk about fundraising but in terms of what can actually consist in a budget. And I don't think board members who don't have that financial background should be scared of that responsibility. I think we should embrace it. It's what makes the world run. I mean, love is what makes the world go around, sure, but also money. We know that. And this is a very positive thing, you know. It's a privilege. I consider it a privilege to ask people to partner with me in making this tremendous impact in the world for whatever our mission is. At the same time though when we talk about an operating budget for an organization. Fundraising is not necessarily the only stream of revenue that can come in. Like for example at gateways we have some tuition costs for a different program where families are enrolling children into a particular program so there's some income from that. If an organization is so lucky and savvy and whatever, to have some kind of a reserve or endowment fund so there's usually some interest or dividend that can kick out from that and be part of the revenue stream for the organization. There are different ways that organizations can quote on quote make money. But generally fundraising and funds that you can receive from foundations -- so grants, what we call grants usually -- are what make up the majority of an organization's revenue stream. So it's really important to pay attention to all of them. And the other couple of things that I'll add and I'll turn to Erica for giving some examples of successful nonprofit financial models. But one of the things that I looked at whenever I look at an organization, this is something that charity navigator, which is kind of like a watchdog of nonprofits. And looking at what checks off all the boxes of a healthy -- a financially healthy nonprofit. And one of the things is the 80 20 rule is what we kind of call it. Where for every dollar that we're spending, 20% should go to administrative and fundraising costs and the other 80% should go to our programs and services of what we do. And that's what's considered like the the gold standard of a healthy nonprofit to have that kind of spending model on on your donor dollars. And so we really do pay attention to that when we're thinking about what we're spending that money on in terms of operating and so Erica I'm gonna turn it over to you for your own thoughts on what makes a successful nonprofit financial model.

>>Erica Goldman: I think that you're -- I think that you're right Tamar, that a lot of nonprofits depend on fundraising as their number one source or their foundation support in particular. Within the Jewish nonprofit sector there are a number of organizations who are dependent on a small -- a relatively small number of foundations giving them grants as you said. Which we could tell -- we have another whole webinar about grants and how they work and the reports you have to write. There's a there's a whole you know lingo and process once you get involved in that kind of work. I think there is actually another webinar about it. But I'll say from my point of view the healthiest nonprofit -- and I think we're hearing this more and more from foundations as well -- the healthiest nonprofits have a nice mix of income streams. So that means fundraising as one of the streams and that breaks down into more than one category too because there is this foundation grant support. There is also individual fundraising which are kind of different. So if Michelle, you know, was a board member who did have a huge amount of capacity she might be individually supporting an organization at the same way that, you know, we thanked the Shusterman foundation for supporting respectability at the beginning, you know, they're the kind of foundation that also provides, both of those I would say individual and foundation counts as fundraising. But in addition to that, like I sort of alluded to in the beginning, nonprofit organizations can also charge for programs or conferences or other, you know, programs or services that they develop. So there's there's the fundraising stream or the development related stream of income, but there really can be earned income as well. There can be revenue in that kind of way from something that's being sold by the organization. There's also you know a membership model that a lot of organizations still use. Synagogues used to really rely on that and that's shifted in the last number of years but there's still plenty of organizations where a membership model makes sense. And so that's another kind of stream of input where there's a stream of income where there's like membership dues that are being paid registration fees there's something like that. In addition to interest on reserves or endowments or other things like that that Tamar said. So -- and in my mind -- the most healthy model is one that includes all of those. So that if for some reason one were to dry up where one were to go away or one were to not come through the organization can fall back on the other the other various streams that it has. So fundraising is certainly a big big component and I like to really think of it as one piece, you know, like sort of -- one part of a balanced diet.

>>Tamar Davis: I think that's so important to recognize. I know that locally, I'm in the Boston area -- our federation which we call CJP Combined Jewish Philanthropy -- they've done like this health indicator study for all of their grantees and really analyzing how many of their grantees rely on one source of funding for over 50% of their operating budget. And that's a big question that a lot of organizations can grapple with because as you said Erica if that source of funding dries up it really can put your operation that risk. And so that's something that, you know, especially as we the nonprofit sector become more and more strategic and thinking business model without losing that mission and passion and all the great stuff that drives our sector, understanding the need to sustain that in a physically healthy way is really where this this nonprofit sector is going. So we have about, you know, just under 15 minutes left of our time together and I'm looking in the Q&A to see if there are any questions. And please, I ask our our attendees who are on to feel free to type in any questions that you might have. We'll keep chatting, you know, just to keep the conversation going but we're happy to answer any questions that you might have for us. It's always a little funny like you can't see the audience per se but we know you're out there and we know you're curious and we appreciate that you're spending part of your day with us today. One thing that I was thinking about in terms of nonprofit sector is about strategic planning and how we are really starting to think more and more about not just the year like what are we doing this year but really thinking about the next three to five years. And more and more organizations -- the donors and stakeholders are looking for where the business plan is, what the model is, what we're looking to accomplish in three to five years. I wanted to ask you both Michelle and Erica like what do you think about when you think about strategic planning impact? Like what kind of impact -- how do we measure impact? How do we measure success when we think about nonprofits?

>>Michelle Friedman: I think -- I mean, if I can jump in, we happen to be doing our second -- launching our second strategic plan now at Keshet. And you know, for me -- I don't know how we can proceed as an organization without two things: the big goal, the big north star. Where are we trying to get to? Like what's our ultimate goal, you know. Some people look at it like 25 years, some people look at it smaller, three to five years. But what do we want to accomplish in the world? If we, you know, if we did our job what would the world look like? But how do you know what that is without creating that end goal to get from, you know, you want to get from A to B. To get from A to B. B being that big vision goal, I think Jim Collins calls it. What is it called? The big hairy audacious goal, something like that. To get, you know, that's where you want. That's what the strategic plan is, how do you get to that big hairy audacious goal? To get from A to B you need a a map, a road map, goals and objectives and how to get there. And that's what the strategic plan is. And to me that's critical. And that engages your stakeholders and who have input. That's how you measure your impact. You know? What are your stakeholders saying? What are they feeling? What are the community partners? What are the organizations who are out there doing what you do? You know? What's your reputation? Those kinds of questions come through, through the strategic plan to help you identify your strengths and your weaknesses and where you want to be going to get to where you ultimately want to go. That was a lot. I said that really fast sorry. I'm a little passionate about strategic planning.

>>Tamar Davis: Yeah no, I just love your sense of humor Michelle, that's really what I was chuckling about. Erica, did you want to chime in on this?

>>Erica Goldman: Yeah, sure. You sort of -- we're talking about two, strategic planning and evaluation, I think are both two kind of hot topics in nonprofits. JPRO also recently engaged in a couple more years strategic plan. And the idea is do it every few years to map out the coming years. And in addition to what you said, Michelle, I think of it also as a tool for making decisions in a lot of ways. If we said this is what we plan to accomplish in the next few years, when other things come along, you have a rubric for saying yes to them or saying no to them or saying this wasn't our plan. Or if we're going to do this thing, we're going to need additional funding, we're going to need additional staff, because it's not in our plan. Or it is in my plan, so you know, we know that we can -- incorporate that. And it's a really powerful tool for going forward like that. Especially like, because there is this way -- like Tamar like you said in the beginning that we think of nonprofits is very like lovey and squishy. There is a big heart aspect where like mission-driven organizations want to do everything sometimes and they want to say yes to every kind of opportunity and they can't necessarily do that with a small staff or with you know a smaller budget. And a strategic plan can be a helpful tool in figuring out, what do I need to accomplish those goals? If I'm going to set out to accomplish this area, I just ask this task. I need to have this budget in mind, I need to have this many people on board, these things need to fall into place. And if they don't or if I don't have the support for it, we're not going to be able to do that, or we're not going to go ahead and try to do that because we know we won't get there. So it's a very helpful tool in that way. A quick word about evaluation. I think maybe over the last decade, I would say, that the shift into thinking strategically about evaluation has really increased. And what I mean by that is really checking -- is what are the tools we have for checking to see if we have accomplished what we set out to accomplish? So strategic plans include a lot of goals, right? Not just I want to do this thing, but here's why I want to do it. I want to have this many programs in this many communities because I want to change how people think about x or y or z or whatever. There's, you know, there's different levels of the goals. And evaluation tools, like a theory of change or, you know, any of the other, you know, qualitative surveys and quantitative surveys. There's a lot of items in the evaluators toolkit to help you check, "did I accomplish what I set out to accomplish three years ago when I wrote this plan, and then I did these things in the meantime. You know, did it work or did it not work, and how can I learn how to do better, you know, next time around?" So evaluation is a real component, I think, of the way that nonprofits organize themselves now and think about it and look forward and look back.

>>Tamar Davis: Yes, and I think also, to your point Erica about evaluative tools is -- it can make the staff feel great about what they've accomplished or identify barriers to success of what we're trying to accomplish. It makes the donors feel great about what their impact of their donor dollars are doing. It serves a lot of purposes, and not just internal but external, and all of that. I do want to -- there are a couple of questions that came up in the Q&A here. So one David Sharif, thank you for your question. "Do these leadership webinars happen everywhere? Is it possible to have a webinar related to other topics? Potentially autism." So this is part of a series. There are a bunch of different topics that are being discussed. I don't think autism is a specific topic of an entire webinar. But I do think that the the different various webinars are focusing on -- for example on July 15th there is one on effective disability advocacy from the inside and how making sure that advocacy from internally in the organization -- how we can really effect change for greater inclusion, which again can mean, like, how we include people who have a hearing disability like myself, or how a person with autism can have access as well. So I think that's where some of the specific issues around disability might bubble up. Again, another one is on July 20th, there's accessible events both in person and online. So again, how are you making your event accessible to a person in a wheelchair versus a person who has a visual impairment. Like, those are two different types of ways you would address that to make your event truly inclusive. So I think again, you know, based on the topic of conversation, what are the different lenses of disability that we're talking about? So I would encourage you to attend some of the others and I'll leave it to the RespectAbility staff. I see that Joshua, our our colleague at RespectAbility, is answering some of the questions in the chat as well. And then the other question that I saw was -- and we can end off with this question before Matan Koch comes back to close us out. "What would you say is the most difficult and most rewarding part of nonprofit work?" And that is such a big question. But I will say that probably -- the most difficult part of the work is -- I would say what is our appetite for change? Because part of change is taking risk. And risk is scary, you know, and it means we want to succeed but there's also a fear of if we don't succeed, what does that mean? So I would say that's the big challenge that that I think about and wrestle with all the time. At the same time, what I love about my work right now is: if I'm going to spend most of my day not with my children, this is what I want to be doing. And that just is what drives me in terms of making an impact in our society, in our community and literally for my own children. And now I'll turn over to Michelle and Erica to answer that question as well.

>>Michelle Friedman: I think Tamar -- I agree with you about the difficulties. I think the other part is sometimes in not-for-profit, because there are various barriers financial, whatever, change doesn't happen very quickly. I am an impatient person and I want change to happen quickly. I remember when I first, you know, one of my first -- the first chairman of this my kids day school. I came in, you know, guns-a-blazing and thought I was gonna change everything. And I had a rude awakening. So that's frustrating for me is that sometimes, you know, change doesn't happen so fast. But the most rewarding part for me is when I see the impact of the organization. When I see, for example, Keshet's impact in the community and I know that I've had a part in the decisions that allow that impact. And talk about tentacles, you know, you talk about the different impact. You know, there's lots of impact when you talk about organizations. Not just, you know, the programmatic, it's the community -- that's so rewarding to see that impact and to know that you have a part in making the decisions that really impacted the community, the people, the families. And that's the most rewarding thing for me.

>> Matan Koch: Well that's a wonderful note on which to begin to wrap this up. I want to thank our panelists for this. I mean this was just truly incredible. Please, everyone who is here, direct your friends, your colleagues, and everyone you know to the recording that will be available shortly. We have a few closing slides. Eric or Josh, if you could put those up. Thank you so much. First I want to bring to your attention our National Disability Speakers Bureau. If you are a Jewish individual with a disability who wants to do more of putting your voice out there, which is yet another way to serve nonprofits, then please feel free to reach out to Jake Stimell who is listed there below. If you are a Jewish professional or Jewish nonprofit lay leader who is looking for a speaker, please feel free to reach out to Jake Stimell. This is really just another wonderful example of how we can serve the nonprofits that we love. Next slide please. We also -- for those that are really excited by this training and say "I need a little more hands-on skills, because I really want to get into nonprofit, like, that's my passion that's what I want to do. You know, really do this for a living." We have a fellowship. There are three cohorts a year of a Jewish Inclusion fellowship where we take one or two folks with disabilities, usually who have completed, or at the very end of their collegiate experience. And they come and work with us here at RespectAbility and learn a great deal about how to work at nonprofits. And we work to find them a place to offer those skills afterwards to a nonprofit with a job opening. So if you are interested in that, please read more about it at the link at the bottom of this slide which will be available after this presentation: RespectAbility.org/aboutus/fellowship/ jewishinclusionfellowship. We could really use some shorter links here at RespectAbility. But hopefully that will get you there. Do we have another slide? We do! We have a slide that talks about our upcoming webinars. I talked about them at the beginning, Tamar talked about them, and explaining how they would help you to guide. And we would love to see you at all of those. Coming up next Tuesday is a seminar specifically on how to develop those independent prospects in development, those -- the people that you're going to ask for money, as opposed to foundations or professional giving. But because both are important, as we heard from our panelists today, we then have a seminar about foundations. Then we finally want to take you to that place of working like if you do want a job as our fellowship does and eventually to be a member of Erica's organization for Jewish professionals. Then we're going to teach you, once you've got that job, how do you advocate from the inside? How do you become an advocate for change? And we're going to finish off by making sure that you understand how to help others with disabilities access your events by making your events accessible to all, in person and online. Sign up for any of all of these. Share them with your friends. They are at this link: www.respectability.org/jewish-events. We are now one minute over, so I'm going to thank our panelists. I'm going to wish you all a wonderful day. And Eric or Josh, I think it's time to take us out!

>>Tamar Davis: Thank you so much everyone. Michelle and Erica, you guys were the best. And Andrea, thanks for signing so quickly to keep up with all of our passion. Matan, thank you.

>> All: Thank you.