>> Matan Koch: Good morning to those in the west, good afternoon to those in the east, good whatever time you find yourself in if you are somewhere in the middle. It is my honor to welcome you to the next session in our exciting leadership series. This is a development meeting focusing on foundations, an important source of support for nonprofits. After last week's -- or two weeks ago's focus on individual giving. If you did not see that or any of our other webinars, they are all available online. Next slide please. So I wanted to start with just a few logistical points. We have, for this webinar, live captioning and an ASL interpreter. The ASL interpreter is spotlighted right now so that those on Facebook live can see her. If at any time you would like to spotlight when she is not, simply click at the upper right hand corner of the box and click spotlight. In terms of captions, there should be a button at the bottom of your screen that says live transcript. Click it, click enable and you are off to the races. This is really intended to be a question and answer session, so if you have anything to ask our speakers, put it in the Q&A box. Note that this is the chat box -- and while we will see it if you put it in the chat box, we really prefer the Q&A box. And know that this webinar is being recorded and will be posted to RespectAbility's website by early next week, after we get the captions ready for prime time. Next slide please. So this is a series, and it's a series with whom we have a wonderful group of co-promoters. They are all listed here I'm not going to take the time to read them all. But when you receive the presentation afterwards or download it off of our website, please take the time to look at them -- they're wonderful organizations partnered in this endeavor. Next slide. I do want to thank our generous funders for this series: the Jewish community Foundation of Los Angeles and the Charles and Lynn Schusterman Family Philanthropies. Without their support the series would not be possible. We additionally want to thank the David Berg foundation, the Beverly Foundation and the Diane and Guilford Glaser foundations for their support of our Jewish inclusion program. Next slide please. We have three more webinars in this series, although we do encourage you to go back to that link below and watch the ones you haven't seen. On Tuesday, July 13th -- that is this coming Tuesday for those keeping track -- we have leading at the next level, where we'll help you think about how to find a job in a Jewish organization. Then we will proceed to effective disability advocacy from the inside, because many of you will want to advance the cause of inclusion while inside organizations, and there's an arch to that that we hope to convey. And then we will finish up by a refresh of our accessible events webinar that we run annually, so you have the very best information in how to make your events accessible in 2021. Next slide please. And why are we doing this series? Well by now you've probably heard me say it, but if this is your first one you know, we -- almost every Jew surveyed says that including people with disabilities in Jewish organizations is important, it's something they want to do. And yet when we surveyed in 2018, 19 -- 2019, only 15 percent of jews could even identify a single leader in Jewish communal life. So we started last year by preparing organizations to be more inclusive, and this series is the complement where we are making sure that we actually give Jews with disabilities the skills that they need to be those leaders, or even others who are looking for good leadership skills. So again, if that's you and this is your first visit, go check out the other webinars. Next slide please. So I am now going to introduce our esteemed panelists, Dena Kaufman and David Rittberg, and together they are going to really give you a broad overview of the types of interactions you're likely to have with the foundation world. The Harold Grinspoon Foundation, where Dena works, is primarily what we call an operating foundation. And when she introduces the foundation she'll tell you a little bit more about operating foundations and what they do. And David is here representing the Charles and Lynn Schusterman Family Philanthropies, which is really a hybrid foundation. It does some operating, it does some grant-making. But he'll be speaking today primarily from the perspective of a grant-making foundation. And so I believe that without further ado I now get to turn it over to -- well the next slide will tell me whether David or Dena is going first. I get to turn it over to Dena to talk about the Harold Grinspoon Foundation.

>> Dena Kaufman: Thank you so much. I'm really pleased to be here today and happy to share with you about the foundation. So we are a private operating foundation. What that means is that we have certain programs that we fund, and unless you have something to do with those programs, you don't -- get funding from us, you can't apply for funding or anything like that. So these are the basic -- the four programs of the Harold Grinspoon Foundation. Next slide please. The first one that I'm going to talk about -- can you advance the slide? Thank you. This is probably the best known of our programs and that is PJ Library. PJ Library offers young children books, tapes -- we have a radio show -- that are designed to increase Jewish literacy. So the idea was that at the time, Harold looked around and saw that he had grandchildren, young grandchildren at the time, and he saw that there really were not Jewish books for Jewish children. It was like the helm stories and really old stories. So he started highlighting Jewish artists, and now this is a program. The idea he got from Dolly Parton, who has a literacy program for young children. The idea is that every Jewish child can sign up for a PJ Library book. Once a month they get a book in the mail. It is free for the families, so we partner with local federations, sometimes it's a Jewish community center. They provide part of the funding and we provide part of the funding. So it usually works -- Harold provides half of the funding for the books, and the local community provides the other half. In addition a local community will do all kinds of really cool programming with the kids and grandparents reading to grandkids, and things like that that are really fun. So you see our stats - we've already already sent over 28 million books we have 670,000 subscribers worldwide. That's every month those books are being sent in seven different languages. Harold has spent over 78 million dollars so far. He does have funding partners. Those would be other major foundations that partner with him to provide this. All right next slide -- so that's big, huge program. Voices and Visions is our littlest program, and think of it as a poster series. So the idea is to marry Jewish philosophy with Jewish modern artists, and then they produce the poster series. The idea is you can request a poster series for your organization for free. We're happy to send them out. We hope you will post them on the walls of your organization just so that people have a conversation starter. That's the whole idea. This is our latest poster series, one with Ruth Bader Ginsburg. So I thought that was a neat one to show. And by the way, I gave you the link -- if you want to go back later when you have the slides -- the link to get your free set. All right, next slide. One of my very favorite programs --they're all my favorites -- but Jcamp180 is over 100 Jewish summer camps and day camps. And the idea was that the Jewish summer camps were really great at programming. They were really great at recruiting kids. But they were a little weak in the areas of board governance, strategic planning, fundraising. So at the time that Harold started this, which is probably at least 10 years ago, he decided to offer those programs. So in addition to offering some grants that camps use for capital improvements and for general fundraising, he also provides mentors and coaches in those areas. So everything other than recruiting kids and programming for camp. And that's -- that's a really neat program that we run. All right. Next slide. This is my program. This is life and legacy. So we are a very small staff, so PJ library has like 85 employees, lots of employees. We're -- the foundation has over 100 employees now. Life and Legacy, there are only four of us that do this work. Three of us are national consultants, so I'm one of the national consultants. And we partner with local federations and foundations, Jewish community foundations, in order to offer a program to that local community that partners with local Jewish organizations like synagogues and Jewish family services and JCCs and things like that. So those organizations want to build their endowment funds. So we come in and we partner with them, we teach them how to do it we offer support -- marketing support and other kinds of trainings in order to help them build their endowments. So the idea is that the Jewish community federation or foundation is helping the organizations in that community to build their own financial stability. So that's what I do. I run around the country to all the different kinds of communities and train them in doing this work. And you can see we've already raised over 1.2 billion dollars in estimated future value to those organizations, and I think it's cost Harold about 12 million -- no it's more like 20 million dollars now I think he spent. So he's pretty pleased with this return on investment. And I think the overall comment about the Harold Grinspoon foundation is that when you have a private operating foundation, it is about his money and his decisions and his mission and his choices. So that's why he -- he makes a lot of decisions. Some of the decisions are -- you know, anybody would choose that. And some of them are just him. He's really a visionary, amazing person who looks at Jewish life and says all right, what is missing, what could be stronger in Jewish life. And then he finds a way to fund that. So these are the four major programs, and that's what I have for you today. Happy to answer any questions you have later. David, I think this is over to you.

>> David Rittberg: All right. Well thanks Dena, and I'm proudly one of those -- well, I should say I'm not one of the subscribers. My kids read a lot of PJ library books, although I read them too, to them. Great to be here thanks for the -- you know, thanks for the invite. So I work at the Charles and Lynn Schusterman family philanthropies. You can cut to the next slide there. Schusterman's been around since 1987, created by Charles and Lynn, a family out of Tulsa, Oklahoma. Charles and Lynn collectively led the foundation for its first, you know, about 13 or 14 years. Charles passed away in 2000 and Lynn took over solely as the chair of the foundation, until a few years ago, when her daughter Stacy took over and is our current chair. And -- I'm happy to talk about some of those generational transitions in philanthropic giving, which are a really big part of the family foundation story. We exist to improve lives, strengthen community and advance equity. And we ground that very high level mission in three values that drive everything we do. We don't have the Hebrew words here, but on our website you'd see Tzedek, the pursuit of justice, Tikkun Olam, repairing the world, and Derekh Eretz is treating all people with dignity and respect. You can go to the next slide. So we seek systemic change in the areas we work, systemic change in the United States and in Israel. And the goal is that both countries live up to their highest ideals, to achieve more just and inclusive societies. And as Matan mentioned, we're a bit of a hybrid foundation. We try to achieve these goals in a number of different ways. The biggest bucket is grant making, which I'll spend the bulk of this webinar talking about. We do have -- we do operate as well, just like the Grinspoon foundation, we operate three programs. The reality community, the ROI community, of which Matan is a member of, and the Schusterman Fellowship. We have currently seven portfolio areas: criminal justice, education, gender and reproductive equity, Israel, Jewish community, voting rights, and the family's always been very committed to their hometown of Tulsa, Oklahoma. And you know, one thing we do -- we're new at sort of sharing our -- the numbers of what we give away, but what I'm really -- I'm proud of a lot of things about where I work, but one of the things I'm most proud of, at least in the last 18 months, is how committed the Schusterman family and the foundation's been in the era of COVID. We gave -- as you can see -- over 150 million additive dollars to CLVKD relief efforts across all of our portfolios and into new areas. And those were primarily supporting low-income communities across the United States and Israel. You can advance to the next slide, and actually advance to the one after that, because I realized these were duplicated. But you know, I mentioned -- some of our values before. There's another set of values that actually drive a lot of our decision making that are -- our gut checks, that we're -- you know, what we try to -- how we try to behave internally and how we try to act externally. And those are equity, you know, as you saw before, equity is one of the key words in our mission statement. Impact - we want to make change. We feel like we have an a tremendous responsibility, a tremendous privilege and part of that privilege is to move the needle on some of these social issues that we work on. Optimism --it's really hard to do this work if you're a pessimist, right? These are big things that we're trying to move forward and you have to be able to see a better world, in my opinion, to be able to be an effective steward of philanthropic dollars. Humility - we are not the smartest people in the room, we do not have all the answers. We do everything we do via partnership and we try to be as humble as we can be in the pursuit of all the change we're trying to make. And collaboration is the last one. You know, we've partnered with the Grinspoon foundation on a number of different things. There's -- there are very few social challenges around the world that any one philanthropy can solve. Like, good philanthropy, in my opinion, is collaborative philanthropy, and things in partnership are better. So that's just the most basic overview of how we do what we -- how we do what we do. And I'm sure Matan's gonna push us to dive in a little deeper. Oh, you're muted Matan.

>> Matan Koch: Absolutely. And so we can drop the PowerPoint now, that would be fantastic. And we can un-spotlight our wonderful interpreters so that we -- because we're going to have really a free floating discussion now with everyone. And so really our goal -- the way the panelists thought of this is to demystify the world of foundations and foundation giving. So a lot of our prepared questions are about that. We're already seeing some questions in the Q&A that offer some interesting ancillary topics. So one of those I'm going to raise right now, just ask for you both to work it in as we're discussing rather than answer it separately, which is really advice for folks that might be seeking a career in development or in foundations, and how maybe, you made the choices that got you to where you are and the choices and the thoughts and reasons that you think that they might think about that. I thought rather than addressing that as a totally separate question, in the various stories and anecdotes and examples that you'd be providing you'll probably have reason to -- have ways to weave that in, so I wanted to highlight it here. But now let's jump back and start with really our very first question, which is, I think, to be directed primarily at David. Show us -- how did -- there's a million foundations out there, right? And I wouldn't apply to, you know, the Schusterman foundation if I wanted to fund animal rescue in Milwaukee, right? Like it's not -- it's a valid and wonderful thing, no relation to your mission. That's an easy one. But so how does one really decide how to find the foundations that one is going to approach?

>> David Rittberg: Yeah. I mean, there's -- it's a tough question with some answers, but incomplete answers I would say. I mean firstly, there are actually tools on the internet that allow you to search for foundations or philanthropies that might actually match up to what you're trying to do in the world. There's a number of them. One I'll spotlight is an organization called Candid. Candid is a recently -- is an organization that occurred because of the merger of two organizations: Foundation Center and Guidestar. Foundation Center was a place where you could actually search for foundations, and Guidestar was a place where you could actually search for information on nonprofits. And so they merged together. So it's this, like, huge data bank of lots and lots of information, of which candidates can extrapolate all sorts of interesting trends about where philanthropy is going. So if you are interested in animal rescue, I think is what Matan said, there's all sorts of filtering capabilities on Candid that allow you to search by size of foundation, focus areas, mission, geography, etcetera etcetera. And that's a really good starting spot to just get a sense of the landscape. And actually, for someone in my position who has to research nonprofits all the time, it's also a really interesting tool. There's a -- real push for transparency amongst foundations and non-profits these days, and Candid is one of the places where it's playing out. So we're actually urging a lot of our grantees to make sure that their 990s are filled out really well, that they actually add -- sort of not required financial information. And Candid has all these cool tools to visualize the performance of nonprofits and the finances of nonprofits. And for our team that, again, does lots of research and due diligence, it's one of our first starting spots. And so I'd urge you all to take a look and play around at that website. There's just a lot of resources to learn, and then there's, like, the more challenging, just like, networking, research, analysis to try to find your way to which foundations might be a possible fit for your work. I mean, I'm -- I formerly ran an institution, and one of the things I did was, like, I looked at lots of similar institutions' websites to see who supported them to get a sense of, well, maybe there's mission match for me. I, you know, have -- like I'm sure everyone on this call does, I have a brain trust of people. I have a brain trust of people who I tap into, and I have questions about where to go with my job. And I ask people that I know who I should talk to, and at times ask for connections. And that's where this game can get really hard, because you have to find your way in front of -- people at foundations who are willing to listen to whatever pitch you have.

>> Matan Koch: Dena do you have anything to add to that wonderful answer that David provided?

>> Dena Kaufman: Just that it's fairly intimidating -- if you're a fundraiser, it's fairly intimidating to approach a foundation, because you know, a whole lot of money. So I just would urge you to find your way in when you think you have a match for a foundation. But before you do that, go to that -- once you find the foundation that might have funding for you, go to their website and look at all the rules they have about their funding, because you don't want to waste their time by proposing something that's outside of their mission, so -- and then, that will give you entree to who you can call, a real person hopefully, who can say yes, you're a good match, or no you're not, go ahead and -- you know, they'll guide you whether to submit or not. So I just would urge you to do your due diligence, but don't be afraid to approach a foundation because we -- the foundations, we're looking to give money away, right? Like, we want to give the money away. We just want to give it to someone that matches our mission, because we're kind of trying to accomplish certain things.

>> Matan Koch: I've heard it said and I don't know if you agree that when you bring yourself as a good prospect to a foundation, you're actually doing the program officer a favor, because they want that good prospect to put in their giving. And I think that's a really good way to frame it. It leads us well into our next question, but before we get there, I just want to add one little commentary of my own on this first question, which is to say that this this here's, as you know, a series for potential professionals but also for potential volunteers. And I think for your smaller organizations, a lot of this research, a lot of this review that our panelists are talking about -- those are things you could volunteer to do, if they don't have a paid development staff to spend all this time trying to research. One of the things that all organizations ask their board members and their volunteers - do you have leads for me? Is there somewhere I should go? And so whether or not you are working as a development officer or, you know, there's a role for you to play with this, I think. And that's a particularly important notion. And now, you know, Dena, you've actually already started us on this path, but because so many people hear terms like LOI and [application] and they get intimidated, I'm gonna -- so how would you recommend beginning to approach a foundation? What does it mean once you've done that first research and you think, "okay, maybe I am a match." Talk to us, either panelist about -- who wants to start -- but about the process of approaching a foundation.

>> Dena Kaufman: David go ahead, that's all you! [Laughs]

>> David Rittberg: Sure. All right, I mean, look. One of the things that is tricky is that, you know, these foundations -- many foundations have different processes. So there's the process part of the answer, right, which you got to start -- you got to figure out how a particular foundation works, I'll share how ours does. And then there's the relationship piece which is how do you actually build a relationship with a program officer who's often the position who takes proposals, you know, does due diligence, makes investment recommendations. And, you know, it's -- I would say it's -- foundations are often present a longer game, right? There's -- we are not, while we do represent an individual donor in this regard, we are big. And we have process and procedure and building a relationship with us often takes time. There -- from a process perspective, there are foundations that just have sort of open calls for proposal. We are not one of those, although we've at times dabbled in it for particular projects. We are invitation only. So after you've built a relationship with us, and after we have figured out that there's a match, right, and we've done some preliminary research and we have a good sense that this is something that could stick internally, we invite a proposal. And we have an online portal that asks a series of questions and asks for financial information and information about leadership. And Matan, if you'd like, I'm happy to go into actually what's in our particular application --

>> Matan Koch: I think it would be great if you could pull it up for a minute and just do -- I'm not saying we should go line by line but just to give a sense, some meat to what you're suggesting of what these types of questions are.

>> David Rittberg: So I don't have anything to pull up, but I'll give you the categories that we look for. Right? So first of all, we want to know what's the summary of what you're asking for, right, the proposal summary. What is the project? What does your organization do? What are you trying to solve -- what gap are you trying to solve in the world? That's piece one. And that's in many ways the most important thing, right? Who are you and what do you do? Two is about measuring impact, right? How do you know if your work is successful? Or if you're too young to know yet because you haven't built surveys and whatever, how do you plan to know if it's successful? Right? Like, what is it -- do you have internal surveying that you do? Is there a way to assess the impact of your particular project or initiative? That can be quantitative, that can be qualitative. There's a lot of ways to assess impact or indicate that success is happening. So proposal summary, measuring impact. Three is about organizational capacity. How does the organization around the initiative actually support the goals you're trying to achieve? You know, who are your leaders, who's on your board, how do you structure your organization to make sure that you can accomplish whatever big lofty goals you have? And the fourth one is something that we've recently added which is around risk and agility. We actually added this during COVID because, right, like, people had a plan and then the world turned upside down, and you had to effectively create a different plan or you had to create several scenarios of the way that your organization would have to pivot. So it's really about how you assess your organizational risk, and what are the things that you think can throw you curveballs, can throw you off. What are the -- what's happening in the political environment, what's happening economically, god willing there's not another global pandemic, but is the global pandemic actually impacting your work? And the other thing I really like about that question -- this is a bit of a tangent -- is when I read those, it gives people a sense -- it gives you a sense of how honest people are willing to be. It's actually very scary to talk about your risks, right? It's scary to talk about all the things that could throw the plan that you're requesting a ton of money for off. And I think people that are willing to be really candid about how tough this work is and how they're going to adapt, I think that just speaks really highly. And then the last piece is around finances. Right? Budget -- if you -- have an audit, whether it's an organizational budget or a project specific budget, how do you model yourself financially, which tells this -- which is one of the ways that we can assess the story of is what you're saying you're going to do matching up to what you're actually going to do, because your budget actually speaks to what you're actually going to, you know, how you're going to spend money tells the story of what your organization is actually gonna prioritize. And so it's both a lot and a little. We've tried to boil down to sort of five key areas, because we've gotten a lot of feedback that, like, onerous proposals are really hard to make it through, and we don't want organizations spending tons and tons of time on a proposal to the Schusterman Family Philanthropies. We'd rather have you spending time on the important work that you're doing.

>> Matan Koch: Well isn't it wonderful, we would -- would that -- everyone felt that way, right? But so Dena, it sounds like you have something to add right there -- you just unmuted -- to have you chime in. And now I want to pose two quick follow-ups in two different directions, so I think I'll take what seems like the shorter one first, because the next one will probably branch off into the rest of our discussion.

>> David Rittberg: Before you jump to Dena can I just answer one of the questions that's just --

>> Matan Koch: Well there's a question for you actually David that I was asking --

>> David Rittberg: Oh sorry, sorry, sorry --

>> Matan Koch: And it's based on something in the question box so that this might well be -- but I've merged things together a little bit, which is to say, one of the things that, you know, the philanthropies are a little bit famous for are the way that they sort of revamped LGBTQ inclusion in the Jewish world by requiring every grantee to speak to their efforts in that regard. Obviously this is a series all about disability leadership, and so we're really interested in how did that work, do you think it would work for other foundations to put in requirements like that, or the philanthropies, with regard to disability inclusion? For folks that are thinking about careers in the philanthropic field, is this a way that philanthropies can have interest that is different than just -- impact that is different than just spending dollars?

>> David Rittberg: Absolutely. Look we -- Lynn Shusterman in particular was and still is incredibly passionate about LGBTQ inclusivity in America and certainly in the Jewish community. And she was passionate and did a lot of funding around it at a time when, to be frank, it was unpopular and a bit unheard of, particularly in philanthropic circles. And what I really like about our story there -- and certainly it has -- it's applicable to to disability work -- is we -- and Lynn threw a lot of the tools in the philanthropic toolkit at this, you know, huge social issue. So there was grant dollars, of course. We've already talked about those. Lynn has a powerful voice and so she used thought leadership. She spoke in places, she wrote op-eds. We used research -- and to the question in the chat about, you know, making sure programs and projects are ADA compliant, you know, the way that we sort of changed policy internally, at least in the beginning, was Lynn made a decision that she wasn't going to fund any organizations that didn't have a non-discrimination clause around sexual orientation. And so we called all of our grantees and asked them if they had one. And while we didn't -- we didn't tell them exactly what it needed to be, it actually became a deliverable that they had to have. And what we found was that either people had them and maybe they needed to be improved, or people didn't have them but they didn't know they needed one and they were perfectly happy to do it. They just needed some coaching and support. And it actually went really really quickly, right? And I'm sorry if this story is getting long, but I love this story so I'll say one more thing. So we, like, really quickly had all of our grantees, which is a pretty significant swath of Jewish communal life, having new policies as it relates to nondiscrimination. And so we thought, well, maybe we can do this for the whole sector. And we embarked on a project with the Human Rights Campaign, which is a really well-known LGBTQ advocacy organization. And we had them commission a study. They do something called the corporate equality index every year, which measures, from an employment perspective, Fortune 500 companies' inclusivity in terms of policy, benefits, etcetera. But they've never done one in the nonprofit world. So we funded what was called the Jewish Organizational Health Index, or something like that. I'm forgetting -- this was a long time ago already. And it surveyed hundreds of Jewish organizations and gave people a sense of how far they were along the journey. And I was in an interesting position, because I actually took the survey at the organization that I was working at, happened to have left for Schusterman, and then had to manage the process. And it was fascinating. Just like, through just the act of taking a survey and seeing this report, how much I learned that I didn't know before, right? And so just embedded in that story, I want people to walk away with -- there's actually, like, a million ways to do this work and have impact. And when you have big social problems, you kind of got to throw the kitchen sink at the problem, and try every one of these tactics and coordinate them all together.

>> Matan Koch: Well, that study's fantastic, I think -- Dena, anything to add before I move this in a in a slightly different direction? Okay.

>> Dena Kaufman: Unfortunately we don't really do that work. A number of the camps have -- like, we consult with them about how -- not how to become accessible, but that they should look into becoming accessible, because a lot of the summer camps just physically are not. So we funded that before, but that's part of the funding that they would get from us. And I did ask the question of PJ library to see if any of the books are available in braille. The answer was some of them are but not through us. Like, some of the communities have done it, and that Sifriyat Pijama which is PJ Library in Israel does publish in Braille. So you get Hebrew braille! [Laughs]

>> Matan Koch: Interesting. That is fascinating to me, and I think is -- really, both of those are interesting indicators to our audience. These are -- there are so many ways you could make a difference, even working in philanthropy, it's not just giving money away. I mean, David essentially just talked about what Schusterman did and, you know, operating foundations are an even better example, because really you're in philanthropy and making and running programs and making change. There are now those books in Israel because Grinspoon provides them. So what I've really heard is there is an opportunity to make a difference, and you can bet that whether you're on the nonprofit side or the foundation side, that's the kind of collaboration that one can use to make a difference. The next -- so the next question that we wanted to address as a group when we were planning our order of questions before is how do foundations make decisions about who to fund. And I'm gonna tickle on the end there a question that was in the Q&A which is -- which said once applicants meet all criteria, what makes from a, you know, what gets you to who's the winner, as it were? What is -- because there are no doubt qualified and wonderful proposals that you have to turn down because resources are finite, so what do you consider. And especially how do you decide between two very good proposals if you can only fund one of them, or applicants in the case of your program?

>> Dena Kaufman: Yeah I can tell you that we -- there have been years where we've had a number of applicants and too many applicants to our program and we have had to do a deep dive into who to accept and who not to, and basically came down to the strength of the leadership, the lay leadership, and professional leadership, how excited they were about the program, how willing they were to prioritize it. That was pretty huge. So if you're looking to volunteer in an organization, you are some of the power that we're looking for.

>> David Rittberg: Yeah for us -- well, first I'll tackle the question you gave us, and then the question that came up in the chat, because they're connected in terms of how we get to a decision. I mean, so I got you to the point where we invite a proposal, right? And we have a really rigorous process. Like, we have a whole checklist of, like, a due diligence checklist about, you know, programmatic efficacy, financial modeling, organizational structure, all the things that are mirrored in the application that I shared. And what happens internally is we have a back and forth with the grantee, or the potential grantee, asking them a bunch of clarifying questions, while also setting expectations. And in our shop, what it results in is what we call an investment memo, which is a summary of our recommendation to our board about what kind of grant and what size of grant we might make. And that also leads to a conversation of back and forth -- it's all, like, a very collaborative process. And to the question in the chat, I mean, this is going to be not a -- I don't know if it's going to add clarity, but look, for me, I feel a tremendous responsibility, because I'm stewarding these incredibly valuable philanthropic dollars. And I want to really trust that the organization that I'm actually -- I'm like this middle person, right? I'm representing the organizations that are applying and I'm representing the philanthropy. So from the organizational side, I want to make sure that it's going to spend the money wisely. And I mean, I, like, seek trust, right? Like, I have to feel really good about the leadership of the organization, that they're really honest brokers. By the way, I don't often in this world come across dishonest brokers, but that is sort of what my Spidey sense is out for. And look, the -- beyond that due diligence checklist, like, it really comes down to the leadership, lay and professional, right? It is very hard for an organization to -- certainly to thrive but maybe even survive if it doesn't have strong senior leadership guiding the organization, and if it doesn't have a functional and solid board. I think an organization in the interim can exist with one or the other, but only if it has a plan to sort of tackle -- the other. And so that's really what we look for. There is subjectivity here, and there is emotion in this work. And we have to sort of feel good -- and by the way, the grantee should feel good about it, too, like entering into a partnership that doesn't feel good, that doesn't feel right, that seems slightly off, it'll cause you more problems than the money that you might get will solve. Yeah.

>> Matan Koch: Great. So I want to now pose to both of you, because we had talked about how we're demystifying, and I think one of the myths that exists is that you're reviewing an application for buzzwords, or was there the perfectly crafted sentence. The way that I want to pose the question is: let's presume for a moment that you have two applications. One is perfectly crafted, it's a work of art, but you're not sensing that enthusiasm, you're not sensing that match. The other is cogent. It's coherent, you can -- I'm not saying an application that doesn't hold together. But like, if you were judging a writing contest, the first one would probably win, but that passion and also that good governance and connection to your mission are so clear from the application. Am I right in the supposition -- and though I am aware I'm committing the cardinal sin of asking a leading question -- am I right in the supposition that you are much more concerned that it be a good program with all of those things that you were just talking about then that exactly the right sentence line or perfectly crafted paragraph tried to convey it?

>> Dena Kaufman: Yes, however if you turn in an application which is missing important information or looks like you just -- you know, it was a throwaway, like you just filled it out and turned it in, that does come across. I would say --

>> Matan Koch: Because that's that's a lack of enthusiasm.

>> Dena Kaufman: It's a lack of respect, lack of respect for what you're doing. But we go to great lengths. We actually visit the communities before we accept them. So we go visit them, we meet their leadership, we meet -- in our case where we're working with organizations, we'll ask the organizations to bring their leadership to a meeting. So we go into a meeting with maybe 40 people to talk about this grant that we're bringing to a community. So it's -- we do our due diligence, and we want to know that you do yours.

>> David Rittberg: Yeah I totally agree with what Dena just said, I mean, and look -- just another way to say that is the application is only a part of this process. It's an important part, for sure. But site visits, conversation, relationship building -- it's all about building as holistic a picture as you possibly can.

>> Matan Koch: Great. I think, you know -- I knew that's what you're going to say as we did discuss it in our pre- so I'm not surprised, I'm not going to pantomime for our audience that it was shocking. But I do think it's such an important point that -- what I'm sensing from what you've both said is once you've identified an organization, once that connection is happening, you're not looking for the organization to fail. You're not looking for them not to get the grant. You're not looking for reasons to kick them out. You're actually trying to collaborate, to get to a successful outcome where your funding is, you know, is advancing something important, the mission that you came to do.

>> David Rittberg: I mean we need, Matan, we need -- we need grantees. Like, our work is non-existent, if it not for the grantees that carry it through. We are 100 percent reliant. And so yeah, like, it's about looking for ways to yes for sure.

>> Matan Koch: Absolutely. We just had a lovely follow-up in the Q&A box to this, which is that if you begin that relationship process with an organization and you find out they're not really there yet, they are not quite at the place where you're ready to fund them, but you think there's something there, will you give them the tips and talk with them and sort of watch their guidance so they get to the place that they can be the organization that you see them being?

>> David Rittberg: Yeah. I mean, in a perfect world, yeah. We try to give really candid feedback, and by the way, we we request it too. Because these processes can be really hard. On the other end of it, right, like, we're the lucky ones here, but we give feedback and we often give it gently because this is people's -- these are people's livelihoods, these are people's jobs, these are big social problems. But yeah, we try to give people a sense of what was lacking and why the answer was not exactly the answer you wanted, or why the answer might have been no. [Crosstalk]

>> Matan Koch: Dena, anything to add on that?

>> Dena Kaufman: Yeah, and also some feedback about how your application might be stronger if you wanted to come back, like, next year, you know, or in your other cycle.

>> Matan Koch: And I think again that all goes to the theme of you want good grantees to succeed, you're not -- it's not -- it is not a test, as it were. I'm just scanning the Q&A box before I go next to the next one on our own list, but --

>> Dena Kaufman: Matan I would say that -- if you had two identical organizations that look the same on paper, we are looking for the one that has the greater chance of success in all of the parts that make that up. So we want to give money to people who are going to be successful and using the money to implement change.

>> Matan Koch: Perfect. Now that's something to live tweet for someone who's live-ing -- that's a word to live by. So I think the next thing that I would ask before jumping onto our last two, sort of preform questions -- well I'm going to ask you in a minute but first I'm going to speak to the audience. I think you realize by now that this is a rare treat of two very experienced people giving you really candid answers on a topic that is often hard to get answers on. So this is your moment, put those questions in the Q&A. We have roughly nine minutes left of question talking time and we want to answer your questions. So we have plenty to go through, but this is your moment while you're live with these wonderful folks. And now moving to -- moving to a question that is in the Q&A box at the moment. Again, the way that I would characterize -- because, you know, I've been reframing the questions as they appear in the boxes. So we heard a story from David about the great intentionality around their LGBTQ work. And so I would pose the question to Dena that when we talk about, for instance, the disability themed books that show up in PJ library or other moments where that social change is happening through your program, is your sense that that is done with intentionality and that's part of the mission that the foundation is embracing? Are there other ways beyond an initiative like the one David was describing to put missions like that into your work?

>> Dena Kaufman: So again, I work in Life and Legacy. I'm not so familiar with PJ library or with Jcamp180. But I know Jcamp180 particularly has had a lot of discussion about inclusion, particularly because they're summer camps, right? They're facing gender issues all the time. So they have a lot of intentionality about what they do and how they talk about it. And the advice that we give to camps, PJ library as well is looking to include every child, right? So they they want to be intentional about that as well. I just -- I don't know the specifics, I'm sorry.

>> Matan Koch: No, no, this isn't a panel on PJ library, so the specifics are not as important. It's really just that notion -- what we're doing here, I hope, is painting a picture for the audience of all the different ways to make change, either as an organization working with a philanthropy, or working in philanthropy, or all of the different ways that one can be a change agent. So there's a question in the chat and the question sort of says -- you know, is very COVID specific and talks about risk assessments. I'm going to reframe and say when you are judging and assessing the health of an organization and whether you think they're the right partner, how do you go about making those judgments? And let's hear from Dena first on this one.

>> Dena Kaufman: So let's use an example of the lay leadership that we meet or the professional leadership that we meet. If we see an organization and it has one person who is so dynamic, so wonderful, but everyone around them is a little lackluster, that is a danger sign. That's a red flag. So if they lose that one person, it may all fall apart. So we are looking for multiple strengths is I guess the best way to put it. And I think that's probably the best -- the best answer that I can think of right now. David probably has a different viewpoint.

>> David Rittberg: I would say -- actually not any different, just additional. I would say -- look, the best indicator of future success is behavior from the past. And so you want to get a sense of how the organization or project under current leadership has actually performed. That'll tell you a lot. And just on the -- just to tackle the particular question around COVID, about assessing risk, for us it was about making sure that organizations engaged in scenario planning, like, really just gave a lot of thought to the ways that the next 12 to 18 months could go, and what the implications on the programmatic parts of the organization were, and then what the implications on the financial picture of the organization were. And we actually, like, gave folks examples, connected them to people that we thought were doing it really well, gave a template, simple, it wasn't actually over complicated. But it was as much about thought process and just making sure that collectively, we were just, like, looking at the world as widely as we possibly could.

>> Matan Koch: Great. So the next question on our prepared list is about common mistakes that organizations make with foundations. And it's interesting that that is complemented well by a question in our Q&A box about sort of, you know, failures or your mistakes in your own career path that you've learned from to become the better and super successful professionals that you are. So if you combine those two questions into one notion and could each speak to that, I think that could be splendid.

>> Dena Kaufman: So I -- I was at one point the director of philanthropy for a domestic violence shelter. And we had a number of grants that we got from organizations, and one grant in particular. So when I was new, I was looking at the pattern of the grants and I saw that this grant had been decreasing every year. Like, why are they giving us less money when we have more people to serve and more beds open and things like that? And I contacted them and sat down with them and said, you know, what could we be doing differently that would have changed this pattern? And they said, you know, you're the first one that asked us that. Just -- we want to see that you're including more volunteers. Like, are you kidding me, we have like thousands of volunteers! So I would encourage you that -- to be in touch with the foundation, whoever it is, the program officer is the one who is monitoring your grant. They're seeing how you are responding to the funding and how you are living up to the to the parts of the grant that you've proposed. And be in touch with them and get to know them the way that they are getting to know you. And don't be afraid to ask!

>> David Rittberg: There's not enough RespectAbility webinars to speak to all of my failures [laughs] but --

>> Matan Koch: We could do a whole series!

>> David Rittberg: Great, that's the next series!

>> Matan Koch: The failures of David Rittberg RespectAbility series. Will the philanthropies fund that by the way? [Laughs]

>> David Rittberg: Look, I think there have been times when -- I'll make it about me, like -- I have advocated for us to grant into a new area without us actually knowing enough about what that area is. And with even the best of intentions, you can really disrupt things when you come into a space with lack of knowledge but with money to spend, right? And so the important lesson there is, like, just the constant research, analysis, relationship building for us, because we want to help. We want to help, you know, progress on particular social issues, not actually slow them down. On the question of common mistakes that organizations make, I mean just -- or people approaching foundations, for me it's just, like, spending too much time in the spin zone. Right, like -- I am an expert at nothing, except for maybe I'm pretty good at figuring out when someone is just throwing me too much spin, right? When it's not real, when they're just painting a picture beyond the actual world that we live in. And I think the great secret, at least for me, is, like, if you tell me how great you are and how amazingly successful your project has been, I might lose interest, because why do you need our support, right? When you actually come candidly and can mix all the stuff that you do really well with actually all of your challenges and problems, the good, the bad and the ugly, I think it puts people in positions like ours to -- actually it gives us a sense of ownership in the problem itself, and creates a sense of partnership in solving those problems. And it's counterintuitive. Of course you go into these philanthropies, you got to tell them why you're successful, that's where they're going to fund you. But there's just a balance there, and I think the balance is about candor.

>> Dena Kaufman: I will say that the terminology that you hear a lot is mission creep. So foundations are on the lookout for mission creep, where you find out that there's funding in a particular area. It's not exactly the work that you do but boy, if you change this one thing then it could kind of be described as what you do, right? They're on the lookout for that. You can't step outside your mission simply to get money from a foundation. You've got to be true to yourself.

>> Matan Koch: Again, good advice both for working with foundations and just for life in general. I think we can market this so many ways. We have exactly two minutes left before I have to go to our outro content, as it were, our closing content. So rather than address the last questions that have come up, because we simply don't have enough time, I want to ask each of you to take one of these two minutes. And if you were giving one thought to someone pursuing a career either in philanthropy or development, what is the one thing you really want them to have taken away from this webinar? One of you go first.

>> Dena Kaufman: Take a deep breath. Take a deep breath, and constantly recognize the greater good, the greater mission. This is a job where you are after change in the world, you're after serving your heart and not necessarily your wallet. And it is meaningful work. And you have to keep that at the forefront, because non-profit work is difficult in many ways. But it's your blood sweat and tears. Just keep that at the forefront.

>> David Rittberg: Yeah my -- one point connected to something Dena said, and it's sort of the tough love thing, which is just that I think you have to have a thick skin in this work. I mean to be a development person, it's really hard -- it's -- you get a lot of nos. It can feel -- it can feel personally depleting, and the work's never done, right? The work's never done and it's -- I don't know if it's a piece of advice, but this is for me what -- I didn't expect to be in this career, but it's, I find a lot of meaning and value and I'm like just super happy to wake up and do what I do every day. So if you find the thing that fits, if you find the organization that syncs up values wise with you, I know that's a thing that, like, people say. It just happens to be true. I couldn't do what I do if I didn't believe in the Schustermans and wasn't pretty wholly aligned with their approach to the world. And if you're lucky enough to be able to find that, it's a good sense that the job will work out really well.

>> Matan Koch: Fantastic. I want to thank both of you. I feel like we could easily fill another hour and we still would not have scratched the surface of the wisdom that you each have to convey to our audience. And it's really -- I mean, it's been a pleasure for me to moderate you, and to hopefully do a decent job evoking this wisdom from you. And I do want to say, you know, the reason that Dena and David are here today is because they care about the next generation of folks doing this work, which means if you do think that this is the direction that you want to go, probably there's someone in the foundation world that would be willing to have an informational interview and talk to you about it, whether they work with a non-profit that you're associated with, whether -- they are passionate about their work. They do their work because it makes a difference, and so will the other folks. So don't hesitate to reach out. Josh, can we bring up the closing slides? So we are now in our closing and I'm going to start with the really quick pitch for our national Disability Speakers Bureau Jewish Division, which if you are on the programmatic side of a Jewish organization and you're looking for a voice of a thoughtful Jew with a disability to speak or train on something, email JakeS@RespectAbility.org. You can find out more at the URL on the slide. And next slide please, Josh. I'd also want to do a really quick pitch for our Jewish inclusion Fellowship. If you should decide that leadership in the Jewish community is the right thing for you, you are a person with a disability and you are looking for a hands-on intensive way to up-skill while working with us to do that, you should in fact apply to our national leadership program. And the whole URL for that is at the bottom. For those on the call that are not themselves budding leaders but might know some, please refer them to our Fellowship. We want your talent. Next slide please. And so I leave by telling you again about the three upcoming webinars. The next one will focus very specifically on working in the Jewish world, so it will complement some of the content that we put in today, but really be talking about how to look for a job, how to prepare yourself for a job, how to get for a job, and then again how to turn around and bring that mission to the work that you do, just like Dena and David shared with us today, followed by that accessible events webinar. And again, you can sign up for any of those at www.RespectAbility.org/Jewish-Events. You have been a wonderful audience, and even if there are technically more slides in the presentation, this concludes our show. So Eric, take us out.