Global Jewish Philanthropy

Report on the Jewish Funders Network 2008 Conference in Jerusalem

Tevet 5769
December 2008

- Final Draft -
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Executive Summary


2. This report has three parts: Part I provides a snapshot of the major trends in Jewish Philanthropy; Part II summarizes the impact of the Conference on its participants; Part III focuses on the challenge of forging philanthropic partnerships in general, and particularly among Israelis and North Americans.

Part I: Snapshot of Global Jewish Philanthropy

3. Jews will suffer disproportionately from the economic crisis, since its root cause is the systemic failure in US financial markets. There will be fewer financial resources in the short and longer term while basic needs will grow. Moreover, breakdown of trust will raise 'transaction costs' of managing philanthropic foundations and nonprofits and new regulation will have to be introduced. In the long term, tectonic political shifts are likely with profound implications for the philanthropic world, yet more concrete political implications are still unclear.

4. 'Flat World Philanthropy' – Many of the characteristics of the globalized 'flat world' – such as openness, transparency, mobility, interconnectedness, decentralization and a 'winners-take-all' mentality – have affected the world of philanthropy.

5. Moreover, we are seeing a shift from 'Charity' to 'Strategic Philanthropy' in which philanthropists go beyond financial support to hands-on involvement in the organizations that they support.

6. There is a growing focus on philanthropic impact – While most nonprofits and philanthropists claim to have 'high-impact' strategies, the entire community is grappling with the meaning of 'impact' and its assessment. The concept of high-impact philanthropy may focus either on 'efficiency and effectiveness' or on generating 'transformations'.

7. Gravitation of Israel away from the center – A heated debate is taking place regarding Israel's place in the Jewish world and Global Jewish Peoplehood. One school asserts that Israel has been and remains the only center of the Jewish world, while the other views Israel as one of a few Jewish centers.

8. At the same time, Israel is gravitating away from the center of the Jewish world due to, among other things, the decline in Israel's image, the growth of its economy and alienation among certain factions toward the makeup of its supporters.

9. Recent years have seen a rise of Israeli philanthropy and a fresh 'culture of giving' in Israel, which is motivated by social responsibility and patriotism, focuses
more on strengthening the social fabric and is driven by widespread Business Social Responsibility.

10. **However, Israeli philanthropy is challenged by** weak tax incentives, weak institutions, and widespread public skepticism and cynicism.

11. **There is clear and powerful potential synergy between Israeli and non-Israeli philanthropists** collaborating on philanthropic projects in Israel: World Jewish philanthropy has a relative abundance of resources, while Israel's 'younger' philanthropists have a nuanced knowledge and understanding of Israeli society.

**Part II: Impact of the Conference (With a Grain of Salt)**

12. **The Conference had a significant effect on the philanthropic thinking and activities of the participants.** Specifically, the conference helped professionalize the participants' philanthropic approach.

13. **Conference and site-visits offered a nuanced image of Israel** in comparison to the more traditional view that the participants had been accustomed to.

14. **It seems the relative weakness of the Conference was its content** – In general, feedback on the content of the plenary sessions, workshops and forums was not as enthusiastic as the feedback for the conference's overall structure, makeup of the participants, or some of the site visits.

15. The Conference seems to have been a successful first step in forging partnerships between Israelis and non-Israelis on issues pertaining to Israel and the Jewish world. However, due to gaps in the way each group defines and understands the nature of these partnerships, it seems that there is room for much more work to be done.

**Part III: Building Lasting Philanthropic Partnerships**

16. **Fundamental differences among Israeli and non–Israeli philanthropists regarding values, priorities, habits, structure, impede on building lasting partnerships.** Whereas Israelis tend to seek joint ventures, North Americans tend to seek meaningful relationships.

17. **Our conclusion is that networking among philanthropists and convening them is not sufficient. In-depth focused work is essential for creating the conditions for many lasting synergetic partnerships.**
Global Jewish Philanthropy
Report on Jewish Funders Network
2008 Conference in Jerusalem

Guidelines for Quick Reading
Every paragraph contains a single idea, which is captured in one bolded sentence, usually the first of the paragraph. Footnotes do not contain additional new ideas but rather examples, quotations or references. Therefore this document can be skimmed through by reading the bolded phrases.

Introduction and Background


2. The Conference was designed to be unique in its content and scope:
   a. For the first time, the JFN held its annual conference in Israel to reflect the rising significance of Israeli philanthropy in the Jewish world and to address the interest of Jewish philanthropists in Israel;
   b. The Conference focused on forging partnerships in order to address the growing interest in collaborations that enhance impact;
   c. The makeup of the participants represented a unique and unprecedented balance between Israeli and non-Israeli philanthropists. More than forty percent (156) of the participants were Israelis. North American participants comprised half of the participants (179) while the rest (24) were European, Australian and South African;
   d. A major outcome of the conference was the JFN's announcement that it would open an office in Israel by yearend.

3. The JFN commissioned the Reut Institute to prepare a report on the Conference.

4. Reut is a nonprofit and non-partisan strategy group with the mission of sustaining significant and substantive impact on the security and well-being of the State of Israel and the Jewish People.1 In the context of this report, Reut was asked to deploy its unique set of tools for strategic analysis in order to provide the JFN with an assessment of the Conference's effects.

1 To learn more about the Reut Institute see www.reut-institute.org.
5. **The goals of this report as defined by the JFN are:**
   a. To showcase the main ideas and happenings of the conference;
   b. To provide a snapshot of 'this moment of time' in global Jewish philanthropy; and
   c. To capture the effect of the conference on the participants' perceptions of their philanthropy.

6. **Reut carried out an extensive effort to address this directive.** This report is based on analysis of the protocols of the plenary sessions, forums and workshops that were held during the conference, as well as on research of literature on Jewish philanthropy. Furthermore, as most of the 'magic' happens between sessions and during site visits, we held in-depth interviews with key participants and organizers.

7. Hence, **this Report has three parts:**
   - **Part I** provides a snapshot of the major trends in Jewish Philanthropy;
   - **Part II** summarizes the impact of the Conference on its participants;
   - **Part III** focuses on the challenge of forging philanthropic partnerships in general, and particularly among Israelis and North Americans.
Part I
The Changing Faces of Global Jewish Philanthropy

Introduction

8. The Conference provided an invaluable opportunity to discuss and frame the evolving nature of Jewish philanthropy, which is being shaped by powerful and consistent trends. Some of these trends echo parallel patterns in the non-Jewish American philanthropic community.\(^2\)

9. This chapter provides a snapshot of global Jewish philanthropy based on the deliberations of the Conference and relevant research. These trends can be clustered into four main areas:
   a. The flattening of the philanthropic world;
   b. Gravitation of Israel away from the center;
   c. Rise of Israeli philanthropy; and
   d. Growing importance of strategic partnerships.

10. In addition, this chapter offers an initial discussion of the implications of the global economic crisis on Jewish philanthropy which is based on Reut’s analysis. While the economic crisis was not a dominant theme of the conference, in the present reality, this report would be incomplete without addressing some of its implications.

Prelude: Effect of the Economic Crisis on Jewish Philanthropy

11. This chapter aims to frame some of the possible effects of the present economic crisis, which may impact or even transform the world of Jewish philanthropy. It is based on analysis by the Reut Institute of events, texts, and statements from the past several months. While the long term implications of the crisis remain unclear, we believe that these may represent weak signs of a number of emerging trends affecting the Jewish world.

12. Evidently, the current economic crisis is of rare proportions and is likely to have global ideological, political and social implications, which will affect the Jewish people and the State of Israel.

13. Jews may suffer disproportionately from the economic crisis, since its root cause is the systemic failure in US financial markets. Finance has traditionally

been an industry in which Jews have had disproportionately high representation. Failure of the financial markets not only affects Jewish wealth, but also the stature and esteem of the Jewish community. Frauds such as that of Bernard Madoff exacerbate these trends.³

14. **Hence, Jewish individuals and households, as well as Jewish institutions, are suffering acutely in this crisis.** Initial analysis indicates the following implications:⁴

- **Fewer financial resources in the short term.** Many members of the above mentioned business communities have amassed extraordinary levels of wealth over the past few years. This prosperity trickled down – through philanthropy – to Jewish and non-Jewish institutions around the world and in Israel. In the wake of the crisis, now there are fewer resources to go around.⁵

- **The promising future of Jewish philanthropy has been compromised.** It was expected that a massive transfer of wealth would take place in the coming years from ‘the second to the third generation’ i.e. from the generation that made its fortune during the golden age of the North American Jewish community following the Second World War. This transfer of wealth was expected to benefit many charitable organizations with generous gifts, many of them endowments. Many of these prospects have evaporated. The Madoff scandal only exacerbates the situation.

- **At the same time, basic needs for tangible assistance will grow.** The crisis in the real economy will send many to joblessness and consequent poverty. Needs for basic services of food, shelter and health care will grow, while resources shrink. The outcome may be a significant gravitation of philanthropy in the direction of tangible assistance to the needy and away from support of ‘softer’ causes such as art or research.

³ Mark Charendoff, president of JFN: “It’s an atomic bomb in the world of Jewish philanthropy; There’s going to be fallout from this for years,” Avraham Infeld, President of the Chais Family Foundation: “I don’t think there will be a single institution of Jewish life that will go unaffected. Nobody can sit by the side and say ‘this will pass.’ It’s not going to pass.”; Jonathan Sarna, Professor of American Jewish History, Brandeis University: “The reduction of billions – not millions but billions – in the Jewish economy means that there is just not going to be enough money to sustain all the institutions and initiatives that have been created.” See: ejewishphilanthropy.com, 12/16/08.

⁴ The implications of the economic crisis for the Israeli third sector were also the focus of a recent conference organized by Center for the Study of Philanthropy in Israel (11/16/08). See: Hillel Schmid, Jewish Philanthropy and the Israeli Third Sector in a Changing Environment, Center for the Study of Philanthropy in Israel (11/16/08).

⁵ See: Brad A. Greenberg, "Perfect storm for charities – contributions go down and requests go up", The Jewish Journal, 18/11/08.

However, it is important to mention that recent research shows that philanthropic contributions are weakly correlated to wars, recessions and other crises. Giving in the United States has increased every year but one (1987) for the past 40 years. See: Bradford Wm. Voigt, Resilient Philanthropy, AFP, 9-10/08, 2008.
The nonprofit world will consolidate but the menu of options will shrink. The vehicles that allow philanthropists to 'do good' are effective nonprofits. Many of them will be severely compromised and eventually shut down. Hence, while the nonprofit world consolidates, the menu of options for philanthropic activities available to philanthropists will shrink.

A huge transfer of power in institutions is likely. Those that violated the confidence of others may be shamed and spurned. Those that lost money will lose power. When 'cash is king' those that have cash will take center stage. There will be a political roller coaster in Jewish institutions in the coming months.

New 'class struggle' among, volunteers, professionals and funders? Over the past decades, philanthropists and funders have had very significant power in Jewish institutions and in the organizations they have supported. 'Lay leadership' was often correlated with financial capacity and generosity. In many cases, Ba' al HaMe'aa has been Ba' al HaDe'aa. Professionals, volunteers and people who had been generous in non-monetary ways have often felt somewhat marginalized and silenced. This crisis may shake this equilibrium.

Breakdown of trust will raise 'transaction costs'. A clear consequence of this crisis is a breakdown of trust toward the financial community and within it. Hence, in the absence of trust, 'transaction costs' of managing philanthropic operations and institutions will increase significantly. In fact, a new code will have to be written and new measures will have to be assumed in order to recreate trust among board members, donors, endowment funds and grantees.

Israeli government will be forced to assume a more central role in Israel's public sphere. In the past decade the Government of Israel has shed many of its responsibilities in areas such as education, immigrant absorption or health. Nonprofits backed by philanthropists have filled this vacuum by assuming responsibility and leadership. One outcome of this crisis may be that the GOI will be forced to assume some of its past responsibilities in these areas.

Scarcity of resources will encourage strategic partnerships – As basic needs grow and resources become scarce, strategic partnerships will become essential in order to address the necessities of the Jewish world.

In the long haul: tectonic political shifts are likely but broader political implications are unclear. Jewish philanthropy will be profoundly affected. The question is how. Economic crises such as this one often lead to ideological transformations, as well as to tectonic shifts in political power within and among nations. The Jewish people have often suffered from such transformations. Furthermore, while it is clear that this crisis will have profound implications on Israel and on the North American Jewish community, it is unclear whether it will prove to be a milestone in their rise.
or decline. There should be no doubt that it will have significant implications for Jewish philanthropy.

The Flattening of the Philanthropic World

15. In recent years, there has been a significant shift in the way Jewish Philanthropy is perceived and managed. Major trends include:

16. 'Flat World Philanthropy': a free market of ideas, entrepreneurs and philanthropists – Many of the characteristics of the globalized 'flat world'⁶ – such as openness, transparency, mobility, interconnectedness, decentralization and a 'winners-take-all' mentality – have affected the world of philanthropy. For example, both philanthropists and grant-seekers are exposed to a much wider array of opportunities. Whereas donors have access to many more options for meaningful contributions, grant-seekers also have access to many potential supporters. These new dynamics have brought about a number of fundamental changes in the philanthropic world. These include:

17. Decentralization of the Jewish philanthropic industry: decline of the 'federation system' – Jewish philanthropy has traditionally been centered on the leading institutions of the Jewish community. The most important institutions has been known as Va'ad ha'Kehila (literally: 'Committee of the Community'), which has served for centuries as the representative of the community as well as a mechanism for collection and allocation of resources for hesed. In the USA, this Va'ad HaKehila took the form of organizations and institutions such as the UJA Federation or the UJC.

However, in a flat world, neither grantors nor grantees need the intermediary role of Va'ad HaKehila to the extent that they did in the past. Nowadays, this process takes place on a direct peer-to-peer basis. Consequently, the fundraising prowess of these organizations is steadily declining.⁷

This process is exacerbated by the rise of family foundations which allow their founders to independently pursue particular philanthropic interests.⁸

18. In the flat world, business is fundamentally impacting the third sector – One of the key characteristics of the flat world is the rise of the business community. Hence, it is no surprise that the business world is radically impacting the fundamental layer of philanthropy and nonprofits; i.e. their values, priorities and

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patterns of conduct, as well as their language. For example, donations are conceptualized as 'social investments', new nonprofits are 'social start-ups', their founders are 'entrepreneurs', and funders look for 'exit strategies' to avoid dependence-like relations between granters and grantees.

However, there is a debate regarding how far this trend should be pursued. Clearly, there are unbridgeable differences between the business world and the third sector such as the absence of true capital markets, different regulation, lower norms of transparency or a fundamentally different bottom line. Hence, adapting business concepts to the world of philanthropy and to the third sector is often challenging. Nonetheless, there seems to be consensus that the third sector would greatly benefit from less 'vagueness' and more rigid management practices.

A shift is occurring from 'Charity' to 'Strategic Philanthropy'. The concept of 'charity' is often considered 'traditional' philanthropy i.e. giving money with little or no follow-up engagement ('give-away checks'). In the philanthropic 'flat world' there is a shift to the concept of 'strategic philanthropy' which is often used to refer to cases in which philanthropists go beyond financial support to offer hands-on, business-like involvement in the organizations that they support and in the service of the causes they care about.

Furthermore, there is a shift from supporting 'fish' to supporting 'fishing rods.' Jewish philanthropy is well embedded in the religion, culture and tradition of Tzedakah (charity) that sets moral and financial obligations for Jews to help the needy. However, there was no moral obligation to solve their problems. In recent

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9 Avi Naor in the Conference Opening Plenary: "The philanthropic world has learned that it has to adopt certain aspects of the business world to succeed. For example: Strategic planning, long-term projects, benchmarking, effectiveness and return of investment evaluations, objectives and measurements, exit strategies, flexibility in the face of changing circumstances, reporting and transparency, and more …"

10 There is a growing discourse in the field regarding the quest of nonprofits to become "business like". See: Jim Collins, Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer, November 2005; Phil Buchanan, "Book Review: The Strengths and Weaknesses of "Philanthrocapitalism", The Chronicle of Philanthropy, 10/10/08.

11 "Most early research nonprofits focused on program replication as a means of expanding social impact… then in the past decade, the focus shifted to building organizational capacity in order to deliver programs more efficiently… More recently, nonprofits have been told to look to the private sector for models of success… Although we agree that nonprofits can learn proven practices from their for-profits counterparts… better management practices can create only incremental, not breakthrough, social change". Crutchfield and Mcleod Grant, Forces For Good, Jossey-Bass, 2008, p. 5.

12 It should be noted that while this debate did not come up in the Conference, it is frequently raised as an issue of contention in the literature.

13 According to Paul Brest, the concept 'strategic philanthropy' refers to application of management tools of business and governments – such as business plans, measureable outcomes, etc. - to philanthropy. See: "In Defense of Strategic Philanthropy", Proceedings of the American Philosophical Society, Vol. 149, No. 2, June 2005, pp. 132-140.
years there has been a focus on providing sustainable remedies to social problems through education, capacity building or designated institutions. Both communal institutions such as Federations and private philanthropists are involved in this transition.

21. **Focus on philanthropic impact** – The concept of 'impact' is currently THE buzzword of the philanthropic world. While most nonprofits and philanthropists claim to have 'high-impact' strategies, the entire community is grappling with the meaning of 'impact' and its assessment.

   **The concept of high-impact philanthropy may focus either on 'efficiency and effectiveness' or on generating 'transformations':**

   - **Impact through 'efficiency and effectiveness' means doing more social work with fewer resources.** It seems to be more relevant to social challenges that do not have a fundamental 'remedy' such as in the areas of poverty, health, education or art.

   - **The concept of 'transformations' focuses on generating resilient and sustainable remedies to social problems (providing fishing rods).** This concept seems to be more relevant in areas where a thoughtful intervention can offer a fundamental remedy by 'teaching people how to fish'.

   **The challenge of measuring 'impact’ remains prominent.** In the business world success seems to be simpler to define and therefore to measure. The nonprofit world does not have an agreed upon definition of 'social impact' or 'success' and therefore lacks the tools for measuring impact. Furthermore, long-term effects of philanthropy are even harder to measure, particularly in areas such as education or in projects that attempt to transform public conduct.

**Israel Is Gravitating Away from the Center**

22. **This section addresses the trends that shape the relations between Israel and world Jewry and their implications for Jewish philanthropy.**

23. **Since its inception, the State of Israel has been at the center of the Jewish people and Jewish philanthropy.** In the first decades of Israel's existence, many of the financial resources of world Jewry were allocated to Israel, providing an important contribution to its budget and wellbeing. This was a powerful reaction to the Holocaust and to the drama of the establishment of the State of Israel in the face of monumental challenges.

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15 Crutchfield and Mcleod Grant, *Forces For Good*, Jossey-Bass, 2008, p. 25. This topic was addressed in the Conference panel on *Measuring What Can't Be Measured*.

16 Professor Jonathan Sarna has identified four eras in the evolution of American Jewish philanthropy: the period of mass immigration and dependence on individual Jewish philanthropists, the emergence
24. Currently, a heated debate is taking place between two schools regarding Israel's place in the Jewish world and Global Jewish Peoplehood:

- **Israel has been and remains the only center of the Jewish world** – According to this school, Israel's centrality relies on religion and tradition. Eretz Yisrael and Jerusalem have always been at the heart of the Jewish world, Israel is the only national homeland of the Jewish people, Israel is also the only safety net that Jews the world over have, and the future of the State of Israel is the potential unifying force for the Jewish people.

- **Israel is one of a few Jewish centers** – According to this school, powerful social, cultural and political trends are displacing Israel's centrality and transforming world Jewry. Many Jews do not associate the State of Israel with the center of their Jewish identity nor do they engage with it meaningfully. Also, many Jews would like to see resources allocated in their own communities instead of Israel. Some claim that the State of Israel has not fulfilled its mission of becoming a "light unto the nations," and a few even view Israel as a moral hazard for the Jewish people.

According to this school, it is misleading to refer to Jewish communities outside of the Land of Yisrael as 'Diaspora' – in Hebrew: tfutzot, which means spread out in many directions or gola, which means the status of being in exile – as they do not view Israel as their exclusive center. Some do not even seek a meaningful association with it or a return to it.

25. The context for this discourse is Israel's gravitation away from the center of the Jewish world: "Israel is off their minds" - This is a powerful trend that is

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17 Leonid Nevzlin in session titled The Elusive Common Ground: "When we strive to support our strengths in Israel we do so not because it needs us but because we need it as our unifying force, our guarantee for the future of the Jewish people."

18 Leonid Nevzlin. Ibid: "...today Israel is a unifying force, Israel is the only one Jewish sovereign state, it is our national home, as well as home to the largest Jewish community in the world. We may disagree in its ways and deeds, on its politics, we may even be critical of even many aspects but we do not have another national home and we do not have another force that unites us all together with all our different backgrounds and identities."

19 David Shneer in the Conference session titled The Elusive Common Ground: "Jews around the world, including Israeli Jews... are moving away from a model of Jewish community with Israel at its center and everything else on the periphery called the Diaspora, toward a model of diverse global Jewish communities with Israel as an important diverse center, on a much more complicated cultural and social map with many centers."

20 David Shneer; Ibid: "Ari Kelman and Steven Cohen found … that younger American Jews ... are deeply interested in Jewish culture ... but are less and less interested in Israel and the Holocaust as constitutes of their Jewish identities.” See also: Steven M. Cohen and Sam Abrams, *Israel Off their

Leonid Nevzlin in session titled Elusive Common Ground: "Unfortunately, Israel has been losing its role as a source of pride and inspiration for Jews of the world."

David Shneer, Ibid: "...these studies are showing that the Israeli government is now becoming a source of challenge and sometimes embarrassment for younger Jews around the world. And some of this comes from the fact that the most vocal support for Israel in the US comes from conservative Jewish organizations with the support of evangelical Christians who stand really opposed to the values that younger American Jews hold."

David Shneer, Ibid: "Contemporary global Jewry sees Jewishness less as a collective call and more as an individual path, especially in the United States."

David Shneer, Ibid: "...an end to the Jewish Diaspora ... Jews around the world see the places they are living as home."

David Shneer, Ibid: "... when Prime Minister Sharon called upon French Jewry to abandon ship, many of them were not too happy with that call."; Kantor (President of the European Jewish Congress): "...It is the job of Israeli ambassadors to speak on behalf of Israel to the European Union, we need to support Israel, but we speak on behalf of European Jewry."
As Israel grows stronger, world Jewish philanthropy shifts away. It is increasingly difficult to direct philanthropy to Israel when the Israeli economy grows and prospers. In recent months, when the Israeli economy seemed stronger than America's, this argument has gained force.

Stronger response to growing local needs – In recent years, Diaspora Jewry has been putting greater emphasis on and allocating more resources to the acute problems of their local communities such as strengthening local institutions, affordable and high-quality Jewish education, welfare or Jewish identity.

Tikkun Olam is bon ton – In recent years the value and mission of Tikkun Olam has become central to Jewish philanthropy and has encroached on some of the space that Israel used to capture in the hearts, minds and pockets of Jews and Jewish institutions.

No reciprocity: relative Israeli disinterest in engaging world Jewry – While world Jewry is grappling with Israel's centrality and the relationship with Israel, there is no parallel intensive discourse in Israel regarding world Jewry. The Israeli mindset in this area seems to continue to be embedded in the traditional Zionist Israel-centered ethos, which takes Israel's centrality and primacy for granted, views Diaspora life as compromised and transitional and calls for its dismantling through massive aliya to Israel. Hence, Israel does not offer significant financial support to projects and activities that aim at strengthening Jewish communities or even its own centrality for world Jewry.

Rise of Israeli Philanthropy

26. Israeli philanthropy has developed significantly over the past decade in terms of the number of philanthropists and the leadership role they assume, the size of their giving and its sophistication.

Gary Tobin framed this trend as 'Americanization of Jewish giving'. According to a study on philanthropic patterns of major Jewish American foundations (2004-2005) only 21% of their giving went to Jewish causes, including 7% to causes in Israel. See: Gary Tobin and Aryeh Weinberg, A Study of Jewish Foundations, Institute for Jewish and Community Research, San Francisco, 2007.

David Shneer has written extensively on the decline in interest in Israel and the rise of universal values among American Jews. See: David Shneer, "We are all global Jews now", The Jewish Chronicle, 8/18/08.

27 For instance, the issue of Israeli-Diaspora relations is hardly discussed in the Israeli Hebrew press. See: Gabi Sheffer and Hadas Roth-Toledano, Who Leads? Israeli-Diaspora Relations, Vaan Leer Jerusalem Institute, 2006, p. 293.

Avi Naor in the Opening Plenary: "there has been a considerable change in the Israeli philanthropic community … including the size and scope of personal involvement of donors… Israeli economy has been strengthened dramatically over the past several years [and] … the spirit of giving and the sense of social accountability are growing…"
27. **An emerging 'culture of giving' in Israel** – Israeli philanthropy has been evolving from the traditional model of 'charity' into more sophisticated models of philanthropic giving. In parallel, a 'culture of giving' seems to be emerging among Israel's affluent.\(^{29}\) Yet, Israeli philanthropy is still lagging behind the philanthropic world in the USA. 

Below are a number of trends that characterize Israeli philanthropy:

- **Motivation of Israeli donors: social responsibility and patriotism** – Many Israeli philanthropists consider their giving not only as an act of 'social responsibility' or as a means of 'repaying their debt to society', but also as an act of patriotism, often being uniquely motivated by Zionist and nationalist ideals.\(^{30}\)

- **From addressing 'basic needs' to strengthening the social fabric** – Israeli philanthropy has been evolving from its primary focus on addressing basic needs, such as food security or literacy, to strategic long-term investments in areas that strengthen Israeli society such as art, research or Jewish identity.

- **Creation of a 'philanthropic industry'** – Israel is seeing the emergence of a community of professionals and service-providers, such as consultants, foundation managers and grant writers. Furthermore, philanthropy is becoming a legitimate field of research in leading universities and academic centers.\(^{31}\)

- **Business social responsibility (BSR) is bon-ton among the big corporations** – In recent years, the concept of BSR has been promoted by nonprofits like MA'ALA and embraced by many of Israel's leading corporations.\(^{32}\) In addition, there are businesses and consulting firms that specialize in helping these corporations develop their BSR strategy.

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\(^{29}\) Ilana Silber defines culture of giving as: "a collective and powerful phenomenon, which goes beyond an individual random tendency to give and generates far-reaching structural and social implications." Ilana Silber, "Charisma and Institution Building in a Philanthropic Field: The Case of Israel", quoted in: Roy Peled, *The Emerging Culture of Giving in Israel – Who's Asking What, and What Answers Do They Get?* Prepared for Participants of the Jewish Funders Network 2008 Conference Jerusalem, Israel.


\(^{31}\) For example: The Center for Study of Philanthropy in Israel at the Hebrew University; The Institute of Society and Technology at Tel Aviv University; The Israeli Center for Third Sector Research at Ben-Gurion University; Sheatufim – The Israeli Center for Civil Society; The Israel Office of the Joint Distribution Committee; the CRB Foundation; or The BRM Institute of Technology and Society at Tel Aviv University.

\(^{32}\) A recent survey on the subject indicates that approximately 9% of Israeli business corporations engage in social responsibility. See: Bar Zuri, Roni, *Corporate Social Responsibility and Social*
28. **The challenges facing Israeli philanthropy:**

- **Weak tax incentives** – Israel does not provide generous tax incentives to philanthropy. Many social activities are not recognized as legitimate tax deductible contributions and many nonprofits are not recognized as eligible for tax-deductible contributions. Furthermore, the limit for such contributions is relatively low. Yet, some Israeli philanthropists oppose further tax deduction as they view their taxes as a civic duty empowering the government to fulfill its duties.

- **Nascent institutions** – For example, research institutions are still in development phases; private foundations are not as common as in the USA; measurement of nonprofits has only been introduced recently by organizations like Midot; and information is lacking regarding size and scope of philanthropy.

- **Public perception** – Relations between 'capital' and 'politics' have been a central theme in Israel. This debate has led to widespread skepticism and even cynicism toward philanthropy. These dynamics cause many Israeli philanthropists to conceal their philanthropic activities thereby hindering the development of a 'culture of giving.'

- **A large number of organizations** – Israel's nonprofit sector is large – more then 23,000 organizations – with weak mechanisms to promote healthy competition, collaborations, or mergers.

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33 The Israeli law system grants tax deductions of 35% to donations of individuals, and 27% to donations of corporations. These tax deductions are valid for annual donations of up to 4.13 million NIS. See: clause 16 of Israel’s Tax Law.


35 Danna Azrieli in session titled Philanthropy in Israel: Reflections on a New Era: “there is a tendency to be … doubly critical, of the people who are more privileged than you .. I stay out of the limelight normally.” Avner Stepak: "we like to look at donations with a lot of suspicion, why are they giving, maybe it's because of the big bonus, etc., we do not do the same [for those] who are giving from abroad.”

36 According to the Israeli Center for Third Sector Research in 2007 there were 23,650 active organizations in Israel, 57% of the registered organizations (41,500).
Growing Importance of Strategic Partnerships

29. The synergetic logic of strategic partnerships among Israeli and Diaspora philanthropists – There is clear and powerful potential synergy between Israeli and non-Israeli philanthropists when collaborating on philanthropic projects in Israel.37

- World Jewish philanthropy has a relative abundance of resources coupled with sophisticated institutions, procedures and professionals that thrive on a 'culture of giving' in its communities.

- Israel's 'younger' philanthropists have a nuanced knowledge and understanding of Israeli society, which is critical for effective and efficient giving in Israel.

30. More options for sophisticated giving in Israel – In the past, non-Israeli philanthropists were limited to partnering primarily with the GOI, working through national institutions such as the JDC or JAFI, or working through local branches of their private foundations (such as Yad HaNadiv or the Karev Foundation). The emergence of a generous and sophisticated philanthropic class in Israel creates many new opportunities for sophisticated, efficient, effective and targeted strategic partnerships.

31. The nature of strategic partnerships with the Government of Israel is evolving – The Government of Israel plays a central role in regulating philanthropy and impacting its effectiveness and efficiency. It is the elephant-in-the-room of Israel's third sector and a problematic and challenging partner in many philanthropic initiatives.

In the past, 'partnerships' with the GOI meant that philanthropists provided the means for government agencies, JAFI or JDC to execute. In fact, such gifts were de-facto additions to the national budget. Nowadays, there are much more sophisticated forms of private-public philanthropic collaborations:

- GOI relies on the third sector and hence on philanthropy for basic services – Many nonprofits provide basic services in areas such as food security, health services, education and even art. The provision of some of these services are mandatory by law. Hence, the third sector is the platform for the GOI to fulfill its legal duties. Hence, the GOI is dependent on nonprofits and their philanthropic supporters.38

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37 Avi Naor in Opening Plenary: "Building partnerships between Israeli investors who live here "close to the market place" and who often invest not only money, but also significant time, with the highly experienced investors from the Jewish world of the Diaspora can reap productivity rates as never seen before ... a true and significant synergy where we can all derive maximum benefit through the pooling of our joint resources."

38 Minister Isaac Herzog in session titled Elusive Common Grounds: "Foundations and NGOs comprise about 15% of Israel's GDP and they are central to the way we manage our country. I
Many philanthropists are increasingly reluctant to finance government responsibilities such as in education, health or immigration absorption, especially when they see allocations of national budgets to causes which they do not support.  

Take-over by the government is often the ultimate 'exit' – Many philanthropists view their role and unique added value as financing social innovation and entrepreneurship. If successful, these models need to be scaled to a national level by the government and through the national budgets. Hence, in such cases, a partnership with the GOI may provide the ultimate 'exit strategy' and a platform for national impact. 

The GOI has invited the third sector to its table – Foundations and nonprofits in Israel represent 15% of the country's GDP and have repeatedly proven their critical importance to Israeli society. Recently, the GOI has instituted round tables of nonprofits and government agencies to discuss shared concerns, exchange information, set priorities and divide responsibilities. This decision may turn out to be a historic milestone in the relationship between these sectors. 

Birthright as a model for successful cooperation – The Birthright / Taglit project has been repeatedly referred to as a new model for powerful strategic partnerships toward impacting the Jewish people:

sometimes term it incestuous relationships because we are the regulators naturally as one who needs to implement the law. We of course are the partners of the foundations and NGOs and we are sometimes fully dependent on them and we cannot do anything without them because they're so much more efficient, less bureaucratic and on the spot and focused …”

Lance Lindblom in session titled Government and Philanthropic Partnerships: Are We Leveraging Change or Encouraging Bad Behavior?: "Though these partnerships really offer a tremendous opportunity to leverage resources from the philanthropic world, and to have tremendous impact, they also raise some concerns, and some practical issues, and some questions about how one operates as a philanthropist within a democratic society."

Gidi Grinstein: "A Government failure occurs when the government intervention or lack thereof denies certain sectors of products or services at a market price… the most relevant government failures are an outcome of powerful political incentives that deny adequate response to public needs… Projects that focus on government and market failures hold the promise of a possible transformative change of priorities, habits or patterns that constitutes leadership." Grinstein, "Philanthropy 14: Focus on Government and Market Failures", Blogidi, 2/28/08.

Shlomo Dovrat stated in session titled Government and Philanthropic Partnerships: "I don't think we have to take the role of the government. We cannot replace the government … but once we've demonstrated and once we've worked with them in partnership, we were able to work with them on scaling that idea and building it into a system-wide solution.”

Minister Isaac Herzog, Ibid: "Recently we've passed a government resolution, which is of historic nature as to our relationship with the third sector. We are working closely with representative organizations on defining the boundaries between where government stops and starts and where NGOs and foundations take on.”
Taglit successfully and demonstrably addressed acute needs primarily strengthening Jewish identity among non-Israelis and strengthening ties of young Jews to Israel. In addition, Taglit has proven to strengthen Jewish identity among Israeli participants.

Taglit's success derives from strong partnerships among diverse supporters: philanthropists, some of whom are Israelis, Jewish Communities, the GOI and JAFI.
Part II
Impact of Conference on Philanthropic Thinking

Take this part with a grain of salt
This chapter is based on a relatively small number of interviews and not on a comprehensive survey of the Conference's participants. Its content and recommendations should be viewed as 'food for thought'.

Introduction
33. The goal of this chapter is to reflect the impact of the Conference on the philanthropic thinking of its participants. It is the product of a series of interviews with key participants.43

34. Based on these interviews, our conclusion is that the Conference had a significant effect on the philanthropic thinking and activities of the participants.

35. However, the conference also left participants with some questions regarding the nature of the partnerships that could be forged between Israeli and North American philanthropists.

General Impressions from the Conference
36. Conference made an impact on a personal level – The general feeling conveyed in the interviews was that the Conference managed to impact participants leading them to feel that they were a "part of a bigger story" (there was a "buzz of something important happening"). For some, the Conference had "tremendous impact."

37. Israel location, meeting Israeli philanthropists and site visits, were named critical for providing Conference's unique added value – The location of the Conference in Jerusalem; the opportunity to meet and engage Israeli philanthropists; and site visits were mentioned to have made the conference "exciting, special and unique" and even the "best conference the JFN has ever had."

43 The Reut Institute wishes to thank the people that contributed their time and energy to the success of these interviews: Janet Aviad, Sonia Cummings, Alan Feld, David Gappell, Norbert Goldfield, Yoni Gordis Jacques Gorlin, Roy Peled, Avi Naor, Irena Nevzlin, Terry Rubinstein, Ronit Segelman, and Yael Shalgi, For further details, see Appendix A.
Conference Impacted Three Key Issues: Philanthropic Approach, Projects in Israel, and Partnerships

38. More specifically, the Conference affected the way people think about their giving on three main issues:

(a) **Philanthropic Approach** – First, on the personal level, the conference succeeded in impacting the way people view their own philanthropic approaches and management.

(b) **Projects in Israel** – Second, the conference affected the way people view the projects/places where their donations are directed, in this case, mainly their view of Israel.

(c) **Partnerships** – Finally, the conference affected the way people understand their philanthropic counterparts and potential partners.

(A) Conference Helped 'Professionalize' Philanthropic Approach

39. **'Strategic Philanthropy' as philosophy of giving** – The interviews revealed that the conference pushed some participants towards viewing their philanthropic philosophy as 'strategic philanthropy'. They are beginning to consider the qualitative involvement that will complement their financial support. This was true especially for smaller donors who are still in the process of formulating their philanthropic philosophy. Quote: "The Conference started me thinking about my giving not as charity but rather as philanthropy, with all its implications."

40. **Evaluation is important for high-impact** – The interviews indicated that the Conference raised awareness about the importance of evaluating impact. Quote: "The Conference made me understand I had to define indicators for success and develop other evaluation mechanisms to assess my giving." Another interviewee commented that the conference managed to address this topic just before the economic crisis made it absolutely crucial.

Another participant indicated that despite the fact that some donors are subconsciously reluctant to engage in the evaluation discourse because "it may cause them to realize that they are not really getting any impact," people at the conference were eager to learn and see how they can better assess the projects that they fund.

41. **Israelis viewed the Conference as an opportunity to learn** – Interviews with Israeli philanthropists and professionals indicated that the Conference offered them a unique opportunity to learn from and with the leading experts and players. Quotes: "the Israelis that came did so because they were genuinely interested in getting to know who those American philanthropists were … American philanthropy has a lot to offer in terms of content and that it is a serious business … there aren't many events that are perceived as genuine or high-class enough to be worthwhile … this conference managed to do so …

"
(B) Conference impacted the way philanthropists view Israel

42. **Site visits showed a more 'nuanced' image of Israel** – The Conference and site visits had a powerful impact on the way some non-Israeli participants view Israel. They felt they were shown a nuanced, complex and honest image of Israel, in comparison to the more 'traditional' presentation that they had been used to on past missions to Israel. The site visits managed to blend themes and bring together different organizations to show a spectrum of ideas and issues.

Some interviewees were impressed to see a discourse evolving around issues other than just money. Some North American philanthropists expressed their appreciation of the extent and complexity of Israeli projects. Quote: "the visits opened my eyes to the type of projects I can find and had a genuine impact on the way I see Israel."

**Note on the Site Visits:**

43. While the site visits had a significant emotional impact on many of the participants, reactions to the visits were quite varied. **Satisfaction seems to have a direct correlation with the attendance of Israeli participants.** Site visits that had a high attendance of Israeli philanthropists received much higher praises. Israeli participation seems to have allowed for an intense and honest experience. Hence, 'Culture and Arts' and 'Jewish Identity and Peoplehood' were praised while 'Education' site-visits did not meet participant's expectations.

44. **Also, the Conference offered opportunities to meet a diverse group of Israelis** – Similarly, participants expressed satisfaction with the fact that they had an opportunity to meet a spectrum of representatives of different sectors and a variety of opinions from the government, nonprofits, philanthropists, business leaders and academics.

45. **A critical approach of the Government of Israel** – One of the most powerful impressions in the interviews pertained to the criticism of the Government of Israel. Quotes: "This is not the Golda era, people don't believe the government has no money and can't do anything … this time it was different, at the education tour people approached Yuli Tamir to discuss potential projects, and they weren't afraid to criticize the government on its high public expenditure leading to poor results."

46. **The Conference's weakness was the content of its sessions** – In general, feedback on the content of the plenary sessions, workshops and forums was not as enthusiastic and positive as the feedback for the overall structure of the Conference, for the makeup of the participants and for some of the site visits. These are some of the highlights:

- **Content lacked innovation** – When asked about the effect of the plenary, panel and workshop sessions, participants expressed a spectrum of views. In
general, participants indicated that the content did not meet their expectations for innovation and out-of-the-box thinking.

- **Perhaps, broader view on philanthropy** – Quote: "I would have liked to see the JFN deal with topics that concern philanthropists in general, not necessarily only Jewish ones."

- **Perhaps, more focus on specific areas of giving** – Some expressed the view that the Conference was too focused – again – on generic aspects of ‘philanthropy’ as opposed to specific areas of giving such as education or art. Quote: "perhaps they should think along the lines of 'fields of interest' and go further in-depth. For example, you can pick a subject, go on a site visit focusing on that issue, and the next day you could have workshops in order to think about what could be done."

- **Perhaps, more risks with contentious issues** – There was a view that the Conference could have benefitted from dealing with more contentious issues such as political philanthropy in a professional fashion.

- **Good feedback to sessions dealing with timely issues such as the devaluation of the dollar.**

(C) **Conference impacted how philanthropists view potential partnerships between Israelis and Non-Israelis**

47. As mentioned, the participation of the Israeli philanthropic community was a big success – The Conference provided a unique and unprecedented opportunity for non-Israeli philanthropists to engage their Israeli counterparts and the emerging Israeli philanthropic community and to hear their distinct voice, some for the first time. Quotes: "it was very rewarding for me to see Israeli donors at the JFN, to hear what they're doing, and to hear about partnerships … it was nice to realize that there are people 'like us' in Israel with whom we could partner."

48. **Israelis and Non-Israelis are eager to cooperate through the JFN** – Both Israelis and Non-Israelis indicated that they wish to get to know each other and believe they can learn from the interaction. Moreover, both sides believe that they deal with similar problems and that they wish to collaborate to find creative solutions to complex challenges. Quote: "it was amazing to hear people, Israelis and non-Israelis talking in the corridors on issues of evaluation ... you don't hear that everyday."

Many view the JFN as the most suitable forum to help nurture partnerships among Israelis and non-Israelis. Moreover, people view this as the added value that the JFN can bring to the table. Quote: "the JFN conference caused people to meet, managing to bring a greater number of Israelis than in usual conferences. While the Jewish Agency has already managed to bring a group of Israeli philanthropists together [in the past], the interaction was not leveraged properly."
Was the conference successful in forging partnerships? The Conference was a first step, but much more work needs to be done. It seems that while the Conference was successful in bringing the people into the room, it also left participants with a number of questions regarding the nature of the potential partnerships that could be forged, particularly between Israeli and North American philanthropists:

- **The Conference brought Israeli and non-Israeli philanthropists together.** Quote: "there are rare occasions when events are considered prestigious or genuine enough to mobilize people in the philanthropy business."

- **However, there seem to be different expectations on both sides.** While Israelis are looking for "…partner-sponsors…" Americans are looking for "…meaningful relationships…".

50. In conclusion, the JFN conference in Israel seems to have been a successful first step in forging partnerships between Israelis and non-Israelis on issues pertaining to Israel and the Jewish world. However, due to gaps in the way each group defines and understands the nature of these partnerships, it seems that there is room for much more work to be done.
Part III
Building Lasting 'Partnerships'

Introduction

51. This chapter highlights different perspectives of Israelis and non-Israelis on philanthropic partnerships which impede the ability to form successful long-term collaborations.

Obstacles to Forging Lasting Partnerships

52. Differences in 'culture of giving' impede partnerships – As mentioned earlier, the 'culture of giving' in Israel is different and less mature than in world Jewry. These differences impede successful partnerships.44 They include:

- Exposure – Israeli public discourse generates cynicism and skepticism to philanthropy. Israeli philanthropists tend to be more suspicious of media exposure than their non-Israeli counterparts. For example, Israelis insisted that the Conference be closed to the media.45

- Hands-on involvement – Israeli philanthropists tend to be more active and hands-on in the projects they fund and to pursue their philanthropic interests by establishing their own organizations. They tend to be more reluctant to 'jump on somebody else's wagon' and expect their partners to join their wagon.

- Donors are often reluctant to join boards – Boards of Israeli nonprofits are often populated by professionals and lay leaders who are not philanthropists. In North America, many board members are funders and board membership is often conditioned on financial support.

- Corporate responsibility – In Israel, a large percentage of donations come from corporate funds. In North America and Europe, Jewish donations are mainly linked to private individuals. Corporations are not as flexible to forge partnerships.

53. Different priorities and perceptions regarding Jewish Peoplehood and the place of Israel – While Israelis view Israel's national problems as their top

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44 Participants felt that these differences in culture were "not addressed properly at the Conference" and "came to the surface in various discussions throughout the Conference." One example given was in the plenary session titled: Philanthropy in Israel: Reflections on a New Era.

45 An example given by one interviewee described a situation in which Nochi Dankner, one of the largest donors of the Israeli Philharmonic Orchestra, was booed by the audience when the Orchestra's director thanked him for his support. For further detail see: Ha'aretz Newspaper editorial (May 27, 2008) titled: "Money Sets the Tone": [http://www.haaretz.com/hasen/spages/986920.html](http://www.haaretz.com/hasen/spages/986920.html).
priorities, Non-Israeli philanthropists are also interested in issues such as assimilation and Jewish identity that are less relevant to their Israeli counterparts.46 This conceptual gap affects the following:

- **Different priorities in Israel** – Some non-Israeli philanthropists have a hard time finding Israeli partners for their projects in Israel. Quote: "American philanthropists want to invest in Jewish identity projects in Israel and couldn't find an Israeli partner. They are just not interested in the same things". This is why some non-Israeli philanthropists condition their support for Israeli nonprofits on matching funds from Israelis.

- **Israeli philanthropists are still generally uninterested in funding projects outside of Israel** – They perceive the needs in Israel to be acute and abundant at a level that justifies these priorities. However, Israeli philanthropists are increasingly challenged to expand the scope of their giving to include activities outside of Israel.47 The challenge focuses initially on projects related to Israel such as Taglit but also on projects that are unrelated such as Jewish education. Some Diaspora givers are critical of the nonreciprocal 'one way giving' to Israel.48

54. **Cooperation vs. Partnership** – Philanthropic collaboration may range from *ad-hoc cooperation* aimed at advancing a shared interest without agreeing on a common vision to *long-term partnership* geared towards promoting a common vision. **Whereas Israelis tend to speak more in terms of cooperation around a specific project, North Americans tend to speak more in terms of partnerships.**49

Hence, non-Israelis seek partnerships for meaningful – sometimes even personal – relationships in the pursuit of a shared vision.50 Israelis tend to understand partnerships mainly as joint ventures that should increase effectiveness and

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47 In interviews, Israeli philanthropists and practitioners classified Israeli philanthropists into three groups: (1) Donors coming from abroad, mainly from the former USSR. (2) Donors associated with long-standing family wealth, and (3) Donors that made their fortune in recent years in the high-tech and financial sectors. The first group tends to give more of their donations abroad. A good example is the activities of Lev Levayev in Jewish education in the former Soviet Union

48 The same participant said that it will not be long before North American philanthropists would condition their donations in Israel with Israeli donations to Jewish causes in the Diaspora.

49 For elaboration, see the Reut Institutes' definition for the Terms: Cooperation and Partnerships.

efficiency. Quote: "ideology doesn't play a role in my partnerships … I am looking for someone to partner…it is not about solidarity."

Partnerships are Lost in Translation

55. Many partnerships do not materialize because of 'loss in translation'. Putting Israeli and non-Israeli philanthropists together may not be sufficient for forging partnerships or even cooperation. The above mentioned gaps in values, culture, structure and habits block potential synergy.

56. Networking and convening is not sufficient. In-depth adaptive work is essential for forging many synergetic partnerships – While the Conference was a very important step toward engaging Israeli and non-Israeli philanthropists, much more work needs to be done in order for many partnerships to be forged to realize the evident synergetic potential. The next steps are not technical challenges of networking and convening but require adaptive work of joint learning to bridge gaps in values, priorities, habits and patterns of conduct.
Appendix A: List of Interviews

The Reut Institute wishes to thank the people that contributed their time and energy to the success of these interviews:

- Janet Aviad – Karev Foundation
- Sonia Cummings – Nathan Cummings Family Foundation
- Alan Feld – Vintage Ventures
- David Gappell – Schusterman Family Foundation - Israel
- Norbert Goldfield – The Healing Divides
- Yoni Gordis – Center for Leadership Initiatives
- Jacques Gorlin – The Gorlin Group
- Avinoam Naor – Oran Foundation
- Irena Nevzlin – Natan Fund
- Roy Peled – Karev Foundation
- Terry Rubinstein - The Joseph Meyerhoff Fund
- Ronit Segelman – Rashi Foundation
- Yael Shalgi – Israel Philanthropy Advisors
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- Israeli Center for Third Sector Research at Ben-Gurion University: [http://cmsprod.bgu.ac.il/Eng/Centers/ICTR](http://cmsprod.bgu.ac.il/Eng/Centers/ICTR)
- Sheatufim – The Israeli Center for Civil Society: [www.sheatufim.org.il/english.aspx](http://www.sheatufim.org.il/english.aspx)
- Karev Foundation: [www.karev.org.il](http://www.karev.org.il)
- Center for Effective Philanthropy: [www.effectivephilanthropy.org](http://www.effectivephilanthropy.org)
- Institute for Jewish & Community Research: [www.jewishresearch.org](http://www.jewishresearch.org)
- Gidi Grinstein's blog (the Reut Institute): [www.blogidi.com](http://www.blogidi.com)