

# Finding New Paths for Teen Engagement and Learning: A Funder Collaborative Leads the Way

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*A Case Study*



*Prepared for*  
Jim Joseph Foundation

*Prepared by*  
Informing Change

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## INTRODUCTION

In 2013, about a dozen funders from across the U.S. began meeting together to better understand how to develop and invest in local opportunities to educate and engage Jewish teens. Convened by the Jim Joseph Foundation, members of the group were already supporting teen programming but seeking ways to do it better in order to significantly expand teen involvement in active Jewish life. By the end of 2014, the group had developed into a Funder Collaborative in which at least half of the members were in the midst of or ready to begin grantmaking to support comprehensive, innovative and sustainable new community-based teen initiatives.

Ultimately, the Collaborative hopes its work will reach beyond the initial participating communities, leading to adaptations of the pilot experiments in other communities across the country and in the offerings of national providers of Jewish teen education and engagement experiences.

As part of its commitment to learning, the group agreed to take time to reflect on what they had achieved in the first 24 months of this Funder Collaborative, what had worked in their coming together, and what might have been done better. To facilitate this reflection, Informing Change observed Funder Collaborative meetings, interviewed members at two points in time, and reviewed relevant materials to prepare this case study of the group's early development.<sup>1</sup> Internally, the Funder Collaborative intends for this examination to help inform the ongoing growth and functioning of the group, which expects to continue until at least 2018. Externally, by documenting the lessons learned from this unique Funder Collaborative, they hope to inform future co-funding and shared learning efforts, both within and outside of the Jewish philanthropic community.

### PURPOSE OF THE JEWISH TEEN EDUCATION & ENGAGEMENT FUNDER COLLABORATIVE

To provide a platform for shared learning and collaboration among grantmaking professionals at Jewish Foundations and Federations planning to invest in community-based Jewish teen education initiatives designed to achieve the group's shared measures of success.

## THE GENESIS OF THE FUNDER COLLABORATIVE

Since its establishment in 2006, the Jim Joseph Foundation has been keenly interested in expanding opportunities for Jewish education and engagement among teens. The Foundation's key goal then, as now, is to increase the numbers of youth and young adults who are engaged in relevant and meaningful Jewish learning. This interest—how to expand opportunities and how to do it well—was the seed from which the Jewish Teen Education and Engagement Funder Collaborative grew.

As a relatively new funder, the Jim Joseph Foundation wanted to better understand the merits and challenges of different strategies that were in use or had been tried previously. A number of community-wide teen initiatives had been launched in the 1990s, but most of these had trickled into nonexistence as they reached the end of their substantial seed funding. To avoid a similar fate for its investments, as well as to expand its thinking about possibilities for Jewish teen programming, the Jim Joseph Foundation commissioned a research project to extract lessons from successful teen programs operating within and beyond the Jewish community.<sup>2</sup>

<sup>1</sup> Informing Change interviewed representatives of the Funder Collaborative's member organizations in fall 2013 and again in fall 2014. In the 2013 interview series, 16 representatives of 11 members of the Funder Collaborative were interviewed; in fall 2014, 21 representatives of 14 Collaborative members were interviewed. Informing Change also interviewed 2 consultants in the fall of 2013 and 3 consultants in the fall of 2014, observed the group's monthly phone meetings, attended 3 in-person meetings, reviewed documentation created by and shared among members of the Funder Collaborative, and monitored the shared learning that occurred through the group's online communication platform.

<sup>2</sup> BTW *informing change* & Rosov Consulting (2013). *Effective Strategies for Educating and Engaging Jewish Teens: What Jewish Communities Can Learn from Programs That Work*.



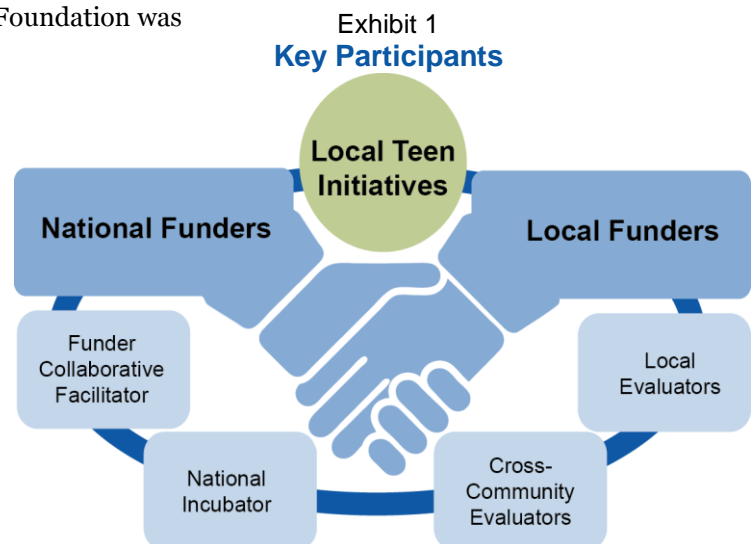
To support the research process, Jim Joseph Foundation staff also began holding conversations and building relationships with other funders who were asking similar questions about expanding and enhancing opportunities for teens. The Foundation invited a few of these funders to join the advisory group for the research project, and the conversations that started around the research continued after it was released. Using the research as a launching point, the Jim Joseph Foundation staff and Board Members also began cultivating relationships with other funders sharing similar interests.

The Jim Joseph Foundation then shared with these funders its interest in making significant funding available to co-invest in high quality local initiatives that demonstrate the principles of success identified in the earlier research and that could be sustained beyond a start-up stage. The Jim Joseph Foundation began convening these funders in what it initially called a community of practice through monthly conference calls, which Foundation staff organized and facilitated. Discussions of desired outcomes within and across different types of programs led to documents outlining shared measures of success, mutual expectations of group members, and agreements about co-funding. With these, the group began to call itself a Funder Collaborative. A few funders came and went, and over time, a natural settling occurred. The resulting group now includes four national funders and funder representatives from 10 communities across the country willing to commit to the drafted principles.

As the Funder Collaborative began taking shape, the Jim Joseph Foundation wanted to shift its role from group convener and facilitator to group participant. In the fall of 2013, the Foundation hired a consultant, Emily Hall of Olive Grove, to organize and facilitate the group’s activities. Further, in anticipation of the myriad of programmatic questions that funders would inevitably have, the Foundation secured a consultant team with significant Jewish teen program expertise—The Jewish Education Project, led by Dr. David Bryfman—to create a National Incubator to provide various types of supports to the communities. At the same time, the Foundation brought in additional consultant support from Informing Change to heighten Collaborative members’ understanding about the value and use of evaluation and to help the funders conceptualize how to evaluate their investments within and across the communities. Stemming from this work, the Foundation subsequently engaged the consulting partnership of American Institutes for Research (AIR), Rosov Consulting and Dr. Steven M. Cohen to conduct a multi-year cross-community evaluation.

Once these resources were in place, the Jim Joseph Foundation was ready to turn its attention to crafting co-funding agreements to support the emerging community initiatives. To obtain the Jim Joseph Foundation’s financial support, local initiatives needed to secure multi-year local funding commitments for at least half of the costs of their initiative and demonstrate that their initiative design reflected community input. The local funders submitted formal grant applications according to the Jim Joseph Foundation’s usual grantmaking processes. Collaborative members say much of their shared learning has occurred through reviewing one another’s funding proposals and requesting specific help from others as they prepare their proposals and implementation plans.

As the funding agreements were being finalized to launch initiatives in the first three communities, the group shifted from general learning about teens, evaluation and community planning processes to more discussions about processes for working collaboratively with each other and with multiple funders.



## EARLY SUCCESSES

As a young Funder Collaborative, the group has been strikingly successful in moving toward its goals:

- Almost all members report a high or extremely high level of satisfaction with their participation in the Collaborative.
- The Collaborative’s content and structure are meeting members’ needs, and members continue to commit the time required for active participation.
- The members have a set of shared measures of success, which are guiding each community’s program design and intended outcomes.
- Half of the 10 communities represented in the Collaborative have either begun implementing co-funded initiatives or have funding proposals under active consideration by potential funding partners.
- Members have secured additional funders and donors to invest in their local initiatives.
- Individuals in the Collaborative, some of whom struggled in the past with disappointing results from previous investments for teens, say the collaborative work has renewed their optimism and given them new energy as professionals to work on the issue.
- There is sustained learning and sharing. With members at different points in developing and implementing community initiatives, the group has a rich mix of knowledge and experience to discuss together and to share in one-on-one conversations outside of meetings.

## MEMBERSHIP

### COLLABORATIVE MEMBERS

- The Associated: Jewish Community Federation of Baltimore
- Combined Jewish Philanthropies of Greater Boston
- Jewish Community Foundation, San Diego
- Jewish Community Federation & Endowment Fund, San Francisco
- Jewish Foundation of Cincinnati
- Jewish Federation of Greater Los Angeles
- Jewish Federation of San Diego County
- Jewish United Fund/Jewish Federation of Metropolitan Chicago
- Jim Joseph Foundation
- Lippman Kanfer Family Philanthropies
- The Marcus Foundation
- Rose Community Foundation
- Charles and Lynn Schusterman Family Foundation
- UJA-Federation of New York
- Anonymous

Similar to other funder learning communities and co-funding groups, the member organizations and their individual representatives in this Funder Collaborative have both similarities with one another and some sharp differences.

### Common Traits of Collaborative Members

- All are funders of Jewish life.
- All believe Jewish communities could do better in engaging and educating Jewish teens.
- All wish to know how to measure success in engaging and educating Jewish teens.
- All are using the Collaborative’s *Shared Measures of Success* to guide and assess their investments in teen programs.
- All have agreed to evaluate their community-based initiatives and participate in a cross-community evaluation that collects common data for aggregate and comparative analysis to better understand teen program delivery and results.

## Differences Among Collaborative Members

- Some members represent private foundations, and some represent Jewish Federations.<sup>3</sup>
- Eleven of the fifteen member Federations and foundations limit their funding to a specific geographic region. Four members fund nationally.
- Members represent a range of history and experience with Jewish teen engagement. Some are building upon ongoing growth and success, while many others are looking to overcome struggles in this area. There are both large and relatively small populations of Jewish teens in members' communities, and a range of investment sizes.
- Members are at different stages of developing new community-wide initiatives. Some have designed and launched their initiatives, and some are in the middle of a planning process. A few have not started a local planning effort, but by agreeing to the expectations for participation in the Funder Collaborative, have expressed the intention to do so in the near future.
- The community initiatives that members have launched and are currently planning vary in design and programmatic focus to address the particular needs of the local community. At the same time, several communities are applying some similar strategies (e.g., piloting teen-led initiatives, developing Jewish youth professionals, scaling innovative engagement models).

The Funder Collaborative also spent time considering its membership composition. Was there a limit to how many communities could be involved or how many funders from any given community? What are the requirements of participation? Should the group expand beyond grantmaking professionals to include board members and individual donors, or initiative implementers? In June 2014 the group decided to stop accepting new communities into the Collaborative. The decision was driven in part by a sense that the mutual trust of the existing membership, built intentionally by the group through two in-person meetings and a year's worth of calls, was an important base for forward movement and should not be diluted. A second consideration was that the Jim Joseph Foundation had determined it was not ready to commit to co-invest with more than 10 initiatives as part of an initial round of experimentation.

Over a number of months, the group discussed the pros and cons of various membership options. They landed on including the communities that were ready to commit to planning a community-based teen initiative, even if they were only in preliminary stages. This selection process was quite organic. Since the group's start, around 20 Jewish Foundations and Federations have been in conversations about participating in the Funder Collaborative, and 15 have stayed. "Those who didn't feel close to the core work have drifted away," said one observer, noting the high amount of time that a member needs to commit to the Collaborative's communications, as well as planning and launching a community-wide initiative.

***“Those who remain [in the Funder Collaborative] are those who want to be here.”***

Most communities are represented by just one philanthropic organization, although two communities have two participating organizations. One or two professionals are participating from any given organization, and there has been some turnover among these individuals as people have transitioned their roles over time. To keep the group to a manageable size while also maintaining a safe space for participants to air their questions and concerns with others whom they see as colleagues, the Funder Collaborative also agreed to limit participation to grantmaking professionals. At this point in time, Collaborative members feel that the diversity of the group provides a useful

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<sup>3</sup> The term Jewish Federation is used to describe a community-based organization with a mission or primary goal to raise and distribute funds in support of Jewish organizations, causes and activities. In most communities, Federations play an additional role of operating some of the initiatives they develop.

learning laboratory, but that if it became much larger, it would become unwieldy and limit their ability to create effective relationships with others in the group.

Given the necessity to place some boundary on membership, there are ongoing conversations about how best to share the Funder Collaborative's work with others, particularly the trustees and lay leaders of member organizations, and how to offer fruitful opportunities for shared learning across communities with those responsible for actually implementing the initiatives. As the Collaborative matures and the local initiatives are in full implementation, members will have to decide not just how to communicate about its vision and accomplishments, but also how to bring its vision of high quality community-based programming for Jewish youth to a wider circle of funders, practitioners and communities.

## FOUR KEY ELEMENTS OF THE COLLABORATIVE'S DEVELOPMENT

Four elements help to explain this Funder Collaborative's ability to develop a shared focus despite the differences among participants.



The original base around which the group first convened was the **research report** about promising practices for teen education and engagement. For many participants, their first interactions with other members of the group were in discussions about this research and its implications for philanthropic investments. That experience of shared exploration and learning significantly marked members' sense of the group's purpose and identity. It also paved the way for deeper one-on-one conversations in later years.



The time spent as a **community of practice** prior to formal funding activities gave the group the opportunity to share stories, ask questions, and get to know one another in a low-stakes environment. Without formal co-funding opportunities on the table, there was less pressure and it was easier for group members to openly share their struggles and doubts as well as their accomplishments and readiness for a new initiative. In addition, the individuals in the group made an explicit effort to connect on a personal level around the work at hand. For example, a number of members note that a pivotal moment in group cohesion was a dinner discussion at the first in-person meeting in 2013 when they shared their own teen engagement stories.



Funder Collaborative members took the time to clarify their collective intentions and mutual expectations. Jim Joseph Foundation staff drafted an initial statement of **shared measures of success**, which Collaborative members discussed, adjusted and adopted. After meeting for a number of months, the group also created a set of **mutual expectations** of Collaborative members, which required an iterative process of vetting and revisions before they could be endorsed by all members of the Collaborative. These two documents were key steps in formalizing the group's commitments.



The Jim Joseph Foundation made an early commitment of **resources** to launch the group and help it coalesce as a learning community with shared intentions. In addition to staff time, the Foundation covered the costs of consultants to guide the group as members identified their questions and concerns. As the group developed its expectations around developing community-based teen initiatives, the Foundation let Collaborative members and potential members know it expected to match multi-year grants committed by local funders. In its first estimates, the Foundation expressed a readiness to consider grant requests totaling up to \$10 million over 8 years for multi-year grants to support local initiatives developed by Collaborative members. That estimate was increased as individual plans for the first round of local initiatives proved more ambitious than originally anticipated.

## STRUCTURE & EXPECTATIONS

Structurally, the Funder Collaborative follows a simple format. The group meets monthly by phone for 60 to 90 minutes and meets in person twice a year at overnight gatherings that typically last about two days. The group uses a web-based communication platform (Basecamp) for planning, sharing information from group members and storing materials. Members also access the knowledge of the National Incubator to support the design and implementation of their local initiatives.

In a similar manner to developing the shared measures of success, the group also developed shared Collaborative outcomes and member expectations. Members are expected to regularly and actively participate in meetings and to keep the group updated about their investments, successes and challenges with Jewish teen programming. All local funders in the Collaborative are expected to be seriously advancing toward or already implementing a new community-based teen initiative with seed funding to last at least 5 years.

For the national funders, the baseline expectation is that they are actively investing in multi-year national efforts to support community-based Jewish teen education. The Jim Joseph Foundation gave early notice that it would offer co-funding for the new initiatives in the communities represented in the Collaborative. The other national funders are investing in the work to develop shared measures and metrics for Jewish teen program evaluation. All of the national funders are providing significant support to national Jewish organizations that operate local teen programming within the communities participating in the Funder Collaborative.

Members say the time commitment for full participation as a Collaborative is significant. Even those who are primarily observing in advance of creating their own local initiative say it takes time to prepare well for meetings, provide input as requested on Collaborative documents, and respond to requests from colleagues between meetings. This time commitment increases dramatically once members are actively planning and preparing to fund their community-based initiative because they spend additional time soliciting ideas from other members and reviewing each other's program designs and funding proposals. However, some of this time is simply the work necessary to create a new initiative, regardless of whether or not the context includes a funder collaborative or co-funding situation.

The Collaborative has maintained a practice of including at least one structured activity at each in-person gathering designed to help participants learn about one another as people, not just professional colleagues. These activities help participants share background stories and personal motivations for the work they are doing; they accelerate the building of mutual appreciation and trust. "Those dinner conversations have worked wonders to build the trust needed for the harder conversations," says one participant.

As with many professional networks, members of the Funder Collaborative would like to spend more time with their colleagues but are constrained by already heavy workloads. The in-person gatherings are highly valued, but no one feels the group of busy professionals should or could meet in person more than twice a year.

## BENEFITS OF PARTICIPATION

All members have found participation in the Collaborative to be beneficial, and they name personal and professional benefits, as well as organizational benefits.

For most members, the professional benefits are at the top of their lists: learning and building understanding and making professional connections. Many say they had expected learning and networking when they joined the Collaborative, but have found both aspects to be deeper and more satisfying than they expected. The specific professional development benefits named most frequently are:



Members also note that their organizations benefit from the Funder Collaborative’s resources and processes. Since all of the organizations intend to launch new initiatives, they find that sharing knowledge and resources with other members is cost-effective. For example, a number of local funders are interested in exploring ways to better develop and support youth professionals, and the National Incubator is convening a sub-group of Collaborative members to discuss potential ways to go about this, including things that could be done collectively across communities.

*“We’re part of this because we don’t want to re-invent the wheel. We want to learn from those who are already doing this well.”*

Being part of a national effort has given the quest for high quality teen programming greater status in the local communities and attracted the attention of potential donors and partner organizations. For those organizations that were tentative about taking on a new big project in an area where past results have been disappointing, the Collaborative’s discussions and other members’ models are encouraging new

confidence. “I’m getting the sense that we can now move forward on a project that we’ve wanted to do,” says one participant. On a more personal level, being part of a national effort, combined with the high quality of this experience, has refreshed enthusiasm among some members about teen programming: “I’ve become re-energized around an important issue,” says another.



## FUNDER COLLABORATIVE CHARACTERISTICS DRIVING SUCCESS

Now entering its third formal year, the Collaborative can list a surprising number of accomplishments for a relatively young group, including active participation by a consistent group, funding commitments for new initiatives in almost half of the participating communities, common measures of success adopted by all, and a cross-community evaluation that will aggregate data across multiple initiatives.

As the preceding narrative has documented, this Collaborative has followed much of the good advice accrued by other funder collaboratives. In addition, four distinctive characteristics stand out as factors that have helped this Collaborative get to the point it is at today: 1) a deep-rooted purpose, 2) commitment to evaluation and shared learning, 3) focus on national-local funding partnerships, and 4) clear-eyed and generous leadership.

### FACTORS FOR SUCCESSFUL FUNDING PARTNERSHIPS

Experienced collaborative funder groups have identified the following as factors for success:<sup>4</sup>

- Clear and mutual values, goals and measures of success
- Strong leadership willing to push forward quickly and assertively
- Strong, visible champions encouraging participation by other stakeholders
- Adequate resources and support
- Flexible participation options
- The right people at the table, drawn from organizational leaders who can access financial resources, community leaders who can generate political will and program officers who can put plans into action
- Time spent building relationships among participants and establishing a collegial tone
- Sufficient time spent on working out internal processes and logistics
- Clear, frequent communications within the group, including prompt documentation of decisions
- Staff or consultant support to facilitate meetings, prepare materials, and collect and analyze data

### Deep-rooted Purpose



The roots of this Funder Collaborative are in the age-old quest that crosses cultures, religions and traditions to “teach our children well.” There is a desire to convey to the next generation the important values and principles that form the base for a life lived well. The quest is significant and grounded in personal values and community concerns. This weighty purpose both inspires and impels Collaborative participants—the philanthropic organizations as well as the individuals representing those organizations—in their pursuit of the group’s goals to develop, launch and evaluate their new teen initiatives.

Some funders say they entered the group with moderate confidence in their present investments in Jewish teen programs, but wanting to increase their scale or scope; others say they were dissatisfied with what they had been doing and were searching for better approaches to serving Jewish teens. Hanging over the group are memories of past efforts in the 1990s of significantly-funded community-based teen initiatives that generated excitement and early results, but faded as the launch funds reached the end of their term. When participants talk about this Funder Collaborative, they recall their doubts and concerns about developing Jewish teen programs to serve a whole community—“We don’t know how to do this well”—as well as a sense of hopefulness that by working together they can have some breakthrough achievements. The prospect of sharing knowledge, whether from new research or from the hard-earned experience in other communities, was encouraging for addressing their common, deep-rooted purpose.

<sup>4</sup> See Abt Associates Inc. (2013). *Home for Good Funders Collaborative: Lessons Learned from Implementation and Year One Funding: Evaluation of the Conrad N. Hilton Foundation Chronic Homelessness Initiative*; Gair, C. (2012). *Strategic Co-Funding: An Approach for Expanded Impact. Grantmakers for Effective Organizations*; Huang, J., The Bridgespan Group, & Seldon, W. (2014). *Lessons in Funder Collaboration: What the Packard Foundation Has Learned about Working with Other Funders*.

## Commitment to Evaluation & Shared Learning



Emanating from the purpose of this Collaborative is a strong emphasis on learning. The group has articulated not only a general interest in mutual learning, but a specific commitment to define, track and measure the outcomes of their teen initiatives, individually and collectively, and to actively reflect on evaluation findings in an ongoing way.

The importance of evaluation and learning was established in the early days of the Funder Collaborative, when the Jim Joseph Foundation ensured that evaluation consultants were regularly available to answer questions and increase participants' knowledge about evaluation. As communities develop plans for their new initiatives, they can request support from the evaluation consultants to develop key evaluation questions, review intended outcomes and benchmarks, or think through plans to collect relevant data.

Members came to the Funder Collaborative in the hopes of not just learning about the best approaches to Jewish teen education and engagement, but also to build their understanding of whether and how the outcomes they desire can be measured. This desire for clear results was one of the driving forces behind the group's shared measures of success. Building from those shared measures, the National Incubator and the cross-community evaluation team are now collaborating to further define and develop ways to measure (i.e., develop survey and interview questions) Jewish learning and growth outcomes specifically for teens. This is groundbreaking work that many in the field have been talking about wistfully for years without being in a position to take action.

Many Collaborative members say that they initially felt poorly prepared to evaluate teen programs and were anxious about the potential for disputes or other problems in assessing results, particularly in a multi-funder, multi-site endeavor. More recently, however, members say their increased understanding about evaluation is a lasting professional development benefit of the Collaborative's work, which is also useful in their work more broadly, such as when they fund evaluation or require it of their grantees. They still have open questions around measuring the impact of their local initiatives, such as establishing a baseline and realistic benchmarks for improvement. At the same time, the level of anxiety is somewhat lessened because of the productive, trusting relationships they have built in the Collaborative, recognizing that many other communities are struggling with the same issues, and knowing that a process is in place to tackle these issues with expert consultant support.

***“The shared measures and continuing measurement work could be transformative for [our organization] and others.”***

Finally, the promise of eventually being able to report aggregated outcomes and to understand whether and how different communities and different program approaches are reaching the group's stated intentions is enticing. This long-term goal of the group continues to motivate the member funders and their local partners to do the hard work of aligning their local and national evaluation efforts.

The work on the cross-community evaluation illustrates a new type of challenge that Collaborative members are now learning to work through. Almost half of the funders in the group now have one foot in the “learning together” mode of the Funder Collaborative and one foot in the more detailed work of implementing their community initiatives. They must determine how to move forward with any joint initiatives that advance their local work, while honoring one another's needs and priorities. Over time, the leaders of the 10 community initiatives working with the National Incubator will test and model some strategies for this purpose. This will be a different type of learning and sharing among Collaborative colleagues.

## Focus on National-Local Funding Partnerships



From the start, as noted in the shared measures of success, one of the Collaborative’s goals was to create community initiatives with staying power—initiatives that would capture the imagination of local funders and donors and continue to receive adequate local funding in future years when the national funding pools were exhausted. To increase the likelihood of this, local funders in the Collaborative have agreed to engage other stakeholders in planning and financially supporting their new teen initiatives. A local funder’s work includes bringing together the right set of players for their community to craft the initiative design, creating a shared vision locally, ensuring that the local goals and expectations align with the larger national visions and securing at least 50% of the funding needed for the initiative’s first 3 years from local funders and donors. The joint planning and local funding are required to be eligible for co-funding from the Jim Joseph Foundation.

Choosing to support local determination of initiative designs and timelines—rather than specifying a common design—honors the unique needs and context of local communities, yet adds operational complexity around collective learning. No absolute due date has been set for launching community initiatives; the Collaborative at this point is comfortable allowing members to explore local partnerships and funding options prior to launching a community planning process. While this flexibility exhibits the Collaborative’s philosophy of local determination, having staggered timelines complicates the group’s plans for evaluating its efforts and communicating about its accomplishments. Having all 10 of the community initiatives in different stages of development also requires a wider range of topics to be discussed in group meetings. These challenges are not insurmountable, but need to be understood and navigated.

The Collaborative’s attention to shaping national-local funder partnerships is due to the availability of significant matching funds from the Jim Joseph Foundation. In 2014, the Foundation announced it planned to invest a minimum of \$10 million through matching grants to the local initiatives; later in the year, the Foundation told the Collaborative it was prepared to invest an even larger total amount for matching funds in the 10 communities, and that it would re-estimate the total potential cost of this initiative on a regular basis as additional communities submit their requests for matching funds. With this expanded commitment, the Foundation is able to consider each co-funding request on a case-by-case basis and work with staggered timelines for funding decisions for the 10 communities.

These national-local funder agreements also have some differences from members’ other funder partnership experiences. Private foundations that have received or are preparing to apply for a Jim Joseph Foundation matching grant are not accustomed to being in the role of grantee; they are used to being equal partners, as in other co-funding situations. Federation representatives in the Collaborative, who are used to applying for and receiving grants say it is the requirements for a shared evaluation and tracking common measures of success that is new territory.

## Clear-eyed & Generous Leadership



Leadership and resources from the Jim Joseph Foundation are chiefly responsible for the strong momentum that enabled the Collaborative to cover as much ground as it did in 2 years. With an institutional interest in finding better ways to serve Jewish teens, the Foundation chose to explore the issue with other funders and committed significant resources to the cause. The reputation of the Foundation for successful collaborative work, as well as being known as keenly interested in teen development, attracted many members to the group.

*“If we were working with this group and the experts they brought in, we could be sure we were doing the right thing.”*

***“With the co-funding available from the Jim Joseph Foundation, the earlier politics among local funders disappeared and we could move forward.”***

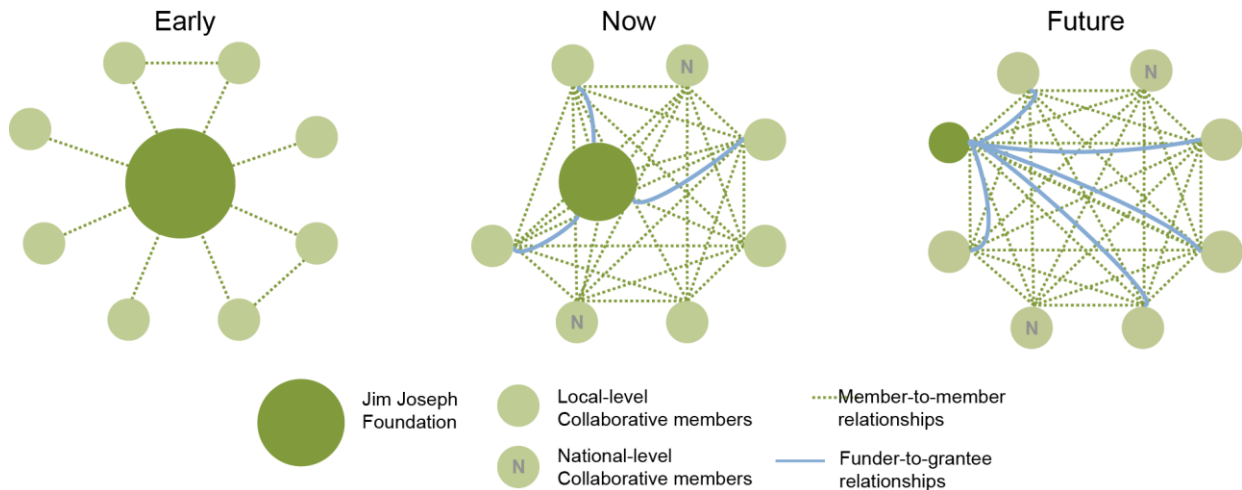
Several of the local funders in the Collaborative admit that they were eager to participate because of the likelihood of finding co-funders for their local work, in particular the Jim Joseph Foundation. Although the Foundation gave no details about co-funding early on, instead waiting to formulate its approach until the needs of the group members and their communities became clearer, it was no secret that it intended to support at least some of the initiatives that would emerge.

Foundation staff say, in general, that the effort and resources for launching the Collaborative were greater than they had originally anticipated. Staff time for making connections, building relationships and sharing knowledge was a steep investment, although the results have yielded great benefits to the Collaborative, to individual members and to the Foundation.

The Jim Joseph Foundation has worked at reducing its overall “footprint” in the Collaborative, starting in late 2013 by transferring the role of group facilitator to the external consultant. Members were happy when Foundation staff could participate more fully in group discussions once they were no longer serving as meeting facilitators.

Collaborative participants are also very complimentary of the Foundation’s transparent efforts to ease into a less central role. As the Foundation moves out of the central organizing position, however, a new element is arising: eventually the Jim Joseph Foundation will have an additional layer of interaction—a co-investor relationship—with each community represented in the Collaborative (Exhibit 2).

**Exhibit 2  
Changing Role for Leader Foundation Over Time<sup>5</sup>**



As the role of the Jim Joseph Foundation has shifted away from that of group organizer, the Collaborative has had to consider its decision-making process and which decisions, for example member expectations, should be Collaborative decisions, and which fall under the Jim Joseph Foundation’s authority, such as decisions related to Foundation funding. These discussions give Collaborative members the opportunity to identify the work and

<sup>5</sup> There are 15 member organizations of the Collaborative, but for illustration purposes, the graphic in Exhibit 2 represents an incomplete number of Collaborative members (i.e., only 9, including the Jim Joseph Foundation).



decisions that rightfully fall to the group, as well as time for the Jim Joseph Foundation to define the work that it is willing to take on or continue.

## CONCLUSION

Similar to other funder collaboratives, the Jewish Teen Education and Engagement Funder Collaborative has given a small group of funders the opportunity to build their knowledge and understanding, to experiment with new approaches, and to have a larger impact on an issue than they could have had acting as individual grantmakers or separate organizations. With shared vision and deeply felt motivations, the members of this Collaborative are starting to take big strides to tackle a familiar challenge with new energy and confidence.

The lessons to date within this Collaborative are clear and certain. The initial gatherings benefitted from **strong leadership** by an organization that did not falter in presenting its vision for the group, and had the ability to bring together old and new colleagues around the issue. Creating a framework to encourage **initial open discussions**—in this case a research study—allowed the funders to get to know one another in a non-threatening atmosphere and collectively begin to set the group’s social conventions. There was an **early commitment of significant financial resources** to the eventual grantmaking, as well as **support for the work of the Collaborative**, including bringing in a facilitator for the Collaborative, providing resources for a National Incubator to support initiative development, and engaging cross-community evaluators to assess the initiatives collectively.

Concrete work setting **mutual expectations** of members and refining **shared measures of success** came after the initial open discussions, once members had already met in person and had more than a surface acquaintance with other funders in the group.

As the Collaborative moves into grantmaking and program implementation and the differences across the participating funders and community initiatives become more apparent, members continue to find value in their participation. They attribute this to the Collaborative’s support and **encouragement of customization** to match the interests and needs of each community and each funder. They also praise the ability of the Collaborative to raise issues that cut across community boundaries, including measurement and evaluation, and which can be more effectively tackled in a collaborative process.

The group’s progress to date demonstrates that learning and funding as a collaborative can break through grantmakers’ doubts, inertia and uneasy loyalties to programs that get incomplete or mediocre results. By the time this Collaborative completes its planned work in 8 to 10 years, members expect to be able to show a total collective investment reaching as much as \$70 million and innovations in Jewish teen education and engagement with potential to change the landscape of Jewish youth work across North America.



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2040 Bancroft Way, Suite 400  
Berkeley, CA 94704  
tel 510.665.6100  
fax 510.665.6129

[www.informingchange.com](http://www.informingchange.com)