

MEASURING IMPACT: NEW DIRECTIONS IN PHILANTHROPY

**COUNCIL OF AMERICAN JEWISH MUSEUMS (CAJM) CONFERENCE
AT THE CONTEMPORARY JEWISH MUSEUM
TUESDAY, MARCH 10, 2015**

PANEL WITH JAMES LEVENTHAL AND DR. LUCY BERNHOLZ

WE LIVE, OBVIOUSLY AND PATENTLY, IN A TIME OF UNPRECEDENTED, ACCELERATED CHANGE. TAKE A FEW SECONDS TO REFLECT ON YOUR OWN LIFE: THINK HOW COMMUNICATIONS, TRANSPORTATION, YOUR FOOD AND DINING EXPERIENCES, TV VIEWING, MUSIC LISTENING, TRAVEL, AND WORK ROUTINES HAVE EVOLVED OVER THE PAST 20 YEARS.

NOW SITUATE YOURSELF IN YOUR PARTICULAR PLACE OF SPECIALIZATION--A MUSEUM PROFESSIONAL IN ONE OF 35,000 MUSEUMS IN THE UNITED STATES. YOUR EXPERTISE IS DEPLOYED AND ENACTED IN INSTITUTIONS THAT ARE FUNDAMENTAL TO BOTH THE CULTURAL AND EDUCATIONAL LIFE-BLOOD OF THIS COUNTRY.

PHILANTHROPISTS HAVE VIRTUALLY NO BOUNDARIES WHEN IT COMES TO INTERESTS IN FUNDING MUSEUMS: TRAINS AND PLANES; STAMPS AND COINS; MUSICAL INSTRUMENTS; AUTOMOBILES; FASHION; REMEMBRANCE OF COMMUNISMS' VICTIMS; AMERICAN INDIANS; INVENTORS; THE HOLOCAUST; PRESIDENTIAL PAPERS; ANTIQUITIES; JUKEBOXES; COMPUTERS; DOLLS; LEGOS; SPORTS HALLS OF FAME; PAINTERS, PHOTOGRAPHERS, SCULPTORS; ARTISTS OF FOUND OBJECTS AND INSTALLATIONS; ESPIONAGE; MYRIAD SCIENTIFIC PHENOMENON; THE HUMAN BODY-- STAGGERING SUMS OF MONEY HAVE BEEN DONATED TO SUPPORT THE BUILDING, OPERATION, AND MAINTENANCE OF A DIZZYING ARRAY OF MUSEUM STRUCTURES AND COLLECTIONS. "THERE IS ALMOST NO INTELLECTUAL OR AESTHETIC NICHE

BEYOND THE REACH OF HUMAN CURIOSITY AND PHILANTHROPIC SPONSORSHIP TODAY" (p. 11 in "MUSEUMS ACROSS AMERICA in PHILANTHROPY magazine, WINTER 2015).

IN THESE SPACES, MUSEUM VISITORS AND PATRONS ENJOY EXPERIENCES OF VISUAL DELIGHT, COGNITIVE DISCOVERY AND STIMULATION, AFFECTIVE SENSATION OF CONNECTION TO ONE'S PAST. "AHA" MOMENTS OF PERSONAL EPIPHANY PUNCTUATE THE BEST OF THE MUSEUM VISITS...THE HUMAN SPIRIT IS ELEVATED, INTELLECT ENLIGHTENED, AND UNDERSTANDING OF SOME ASPECT OF THE HUMAN CONDITION EXPANDED.

SO, YOU ASK, WHAT IS THIS BLATHER ABOUT THEORY OF CHANGE, LOGIC MODELS, OUTPUTS AND OUTCOMES; MEASURABLE RESULTS; SOCIAL RETURN ON INVESTMENTS?

WHAT RELEVANCE DOES EITHER STRATEGIC OR EMERGENT PHILANTHROPY HAVE TO DO AT ALL WITH HOW YOU CONTRIBUTE TO YOUR INSTITUTION'S EXCELLENCE AND ITS PURSUIT TO SECURE SOURCES OF FUNDING?

WELL...KILL THE MESSENGER IF YOU MUST, BUT I WANT TO ASSERT THE FOLLOWING: **PROFESSIONALIZATION OF PHILANTHROPY SEEKING TO ENTWINE THE FUNDER AND GRANTEE TOGETHER IN RELATIONAL WORK PRODUCING RICHLY DESCRIPTIVE AND QUANTIFIABLE DATA MARKING PROGRESS MADE TOWARD MUTUALLY AGREED UPON MEASURES OF SUCCESS IS THE SINGLE MOST DIRECT ROUTE TO STRENGTHENING YOUR FIELD.**

I WON'T DISPUTE THAT FEELINGS OF DELIGHT AND SERENDIPITY AS WELL AS

GENUINE LEARNING CHARACTERIZE OPTIMAL MUSEUM EXPERIENCES.

WHAT I *WOULD* ARGUE IS THAT THESE PHENOMENON CAN BE ASSESSED.

AND I CAN ASSURE THAT MEASURES OF INSTITUTIONAL WELL BEING--MEMBERSHIP; VISITATION DATA THAT IS COMPILED AND ANALYZED IN NUMEROUS TELLING WAYS; EXPENSES AND REVENUES ASSOCIATED WITH SPECIAL EVENTS, GIFT SHOP, AND FOOD SALES; TENURE OF PROFESSIONALS AND COMPENSATION AND BENEFIT RATIOS OF PERSONNEL COSTS AS RELATED TO THE MUSEUM'S ANNUAL BUDGET; EXHIBIT ACQUISITION AND INSURANCE EXPENSES; ENDOWMENT; OPERATING RESERVES; EXISTENCE AND INCIDENCE OF USE OF A BANK LINE OF CREDIT... THESE DATA, AT LEAST FOR THE JIM JOSEPH FOUNDATION AND LIKE-MINDED FOUNDATIONS, ARE ELEMENTAL TO DETERMINING IF INVESTMENT IS MERITED, PRUDENT, AND PROMISING.

THERE ARE COUNTLESS WAYS FOR FUNDERS AND FOUNDATIONS TO GIVE AWAY MONEY AND TO PRACTICE PHILANTHROPY. THE TRADITION OF PHILANTHROPY IN THE UNITED STATES IS LIKE NO OTHER IN THE WORLD. FOR OUR PURPOSES HERE TODAY, HOWEVER, I WILL SHARE WITH YOU THAT THE JIM JOSEPH FOUNDATION HAS AWARDED \$2.45M TO THE CONTEMPORARY JEWISH MUSEUM FOR TWO INNOVATION FUNDS AND ANOTHER \$1.475M TO GEORGE WASHINGTON UNIVERSITY'S EXPERIENTIAL EDUCATION & JEWISH CULTURAL ARTS MASTER'S DEGREE PROGRAM—APPLYING SIMILAR PRINCIPLES OF GRANTMAKING TO EACH OF THE THREE GRANTS.

THE FOUNDATION UNDERSTANDABLY EXPECTS MISSION ALIGNMENT BETWEEN ITSELF AND ITS GRANTEES. MOREOVER, THE FOUNDATION REQUIRES EVALUATION

FOR ALL OF ITS MAJOR GRANTS—WITH EVALUATION PREFERABLY CONDUCTED BY AN INDEPENDENT THIRD PARTY WHO FOCUSES ON DOCUMENTING THE EXTENT TO WHICH MUTUALLY AGREED UPON OUTPUTS AND OUTCOMES HAVE BEEN ACHIEVED.

SO, BY WAY OF EXAMPLE, CJM INNOVATION FUND OUTCOMES INCLUDE THESE TARGET GOALS:

THROUGHOUT THE GRANT PERIOD, THE MUSEUM WILL SEE CONSISTENT INCREMENTAL GROWTH IN ITS VISITORSHIP, INCREASING THE NEARLY 125,000 ANNUAL VISITORS 3% INCREMENTALLY TO AN OVERALL GROWTH OF 10-12% TO NEARLY 140,000 BY 2018.

AND GWU ANTICIPATED OUTCOMES IDENTIFY THE FOLLOWING PROJECTED ACHIEVEMENTS:

QUANTITATIVE AND QUALITATIVE INDICATORS, TO BE DEVELOPED, THAT ILLUMINATE HOW THE PROGRAM CONTRIBUTES TO THE HEIGHTENING OF AWARENESS – AND APPRECIATION – OF THE CENTRALITY OF THE ARTS AND CULTURE TO JEWISH EXPERIENTIAL EDUCATION.

MARIO MORINO, AUTHOR OF LEAP OF REASON, AND DAVID HUNTER, AUTHOR OF WORKING HARD AND WORKING WELL--ARE ADVOCATES FOR WHAT IS CALLED THE [PERFORMANCE IMPERATIVE](#): "THE ABILITY TO DELIVER, OVER A PROLONGED PERIOD OF TIME, MEANINGFUL, MEASURABLE, AND FINANCIALLY SUSTAINABLE RESULTS FOR PEOPLE OR CAUSES THE ORGANIZATION IS IN EXISTENCE TO SERVE."

BEAR WITH ME A MINUTE:

TRAGICALLY, WE LIVE IN WORLD IN WHICH ISIS HORRIFICALLY BURNS BOOKS FROM THE LIBRARY OF THE 265 YEAR OLD LATIN CHURCH AND MONASTERY OF THE

DOMINICAN FATHERS AND PLUNDERS MOSUL MUSEUM LIBRARY TREASURES DATING BACK TO 500 BC.

IT IS IMPERATIVE THAT CULTURAL INSTITUTIONS—MUSEUMS ESPECIALLY—PLAY A ROLE IN PRESERVING AND BUILDING CIVIL SOCIETY. PERVERSE ATTACKS ON EXPRESSIONS OF UNIQUE HUMAN ARTISTRY, KNOWLEDGE, AND MEMORY IN ATTEMPTS TO DIMINISH OR EVEN ERADICATE RELIGIOUS AND ETHNIC IDENTITIES ARE PROFANE.

YOUR INSTITUTIONS ENGAGE, INFORM, ENTERTAIN AND ENLIGHTEN.

YOU ARE PART OF A NETWORK ASSISTED BY CAJM UNITED IN AN EFFORT TO CREATE "MUSEUM SETTINGS FOR DYNAMIC PROGRAMS THAT SPARK CURIOSITY ABOUT JEWISH HISTORY AND CULTURE IN PEOPLE OF ALL AGES AND BACKGROUNDS."

YOUR MEMBERSHIP ACKNOWLEDGES THAT CAJM ASSUMES AS ONE OF ITS PURPOSES AIDING YOUR INSTITUTION TO OPERATE AS "VIALE, RESPONSIBLE, NOT-FOR-PROFIT ORGANIZATIONS."

AND I ENCOURAGE YOU TO CARRY OUT YOUR EFFORTS WITH AN UNREMITTING COMMITMENT TO MEASURED EXCELLENCE.