



Jim Joseph Foundation

Build Grant Evaluation Summary

Research Summary

June 30, 2023

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• Introduction

The Jim Joseph Foundation (JJF) is committed to fostering compelling, effective Jewish learning experiences for young Jews, their families, and their friends. To enhance this work, JJF developed Build Grants to invest in the capacity of Jewish education organizations to dramatically scale their programming to reach larger and more diverse audiences.

JJF's Build Grants include two targeted capacity building strategies. The first, Capacity Build Grants, provides short-term resources to stand-out Jewish organizations for specific interventions that enhance their ability to grow over time. Organizations use these resources for business and strategic planning, infrastructure and operational support, or measurement and program evaluation. The Capacity Build Grants that JJF offers are a steppingstone to the second area of support, the Scaling Build Grants. Scaling Build Grants are focused explicitly on organizational growth, providing larger one-time, multiyear investments meant to expand the organization's reach, increase their effectiveness, and strengthen their ability to generate revenue and sustain an expanded budget. JJF is interested in deepening its understanding of its Build grantees' successes and challenges to further iterate on the Build Grants structure and strategies. To glean insights, the subsequent questions guided the evaluation:

- What was the grantee experience?
- What were some of the key impacts of JJF's Build Grants?
- What were some of the core challenges of JJF's Build Grants?
- What lesson can we learn to improve the grantee experience and grant impact?

The following memo outlines major themes on the structure, impacts, and challenges of Build Grants to date.

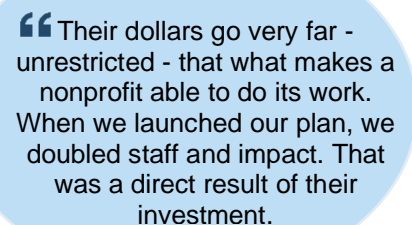
• Methodology

Third Plateau interviewed seven current Scaling Build grantees and one current Capacity Build grantee over the course of March and April 2023, and reviewed grantee reports. Third Plateau also interviewed two JJF program officers involved in leading the Build strategy. Third Plateau analyzed and synthesized the key themes from these conversations together with salient points from grant reports, to evaluate the successes, impact, and challenges of the Build Grant strategy. To protect confidentiality, we have obscured some details where specifics might indicate a particular leader or organization.

• Key Findings

JJF's Build Grants substantially impact the trajectory of grantees.

Grantees reported that Scaling Build Grants significantly enhanced their organization's growth trajectory. Grantee organizations were able to increase the size of their staff, allowing them to develop their internal capacities and increase the reach of their programs. Build funds also helped grantees improve their internal systems by working with consultants to improve marketing, data management, and evaluation practices. They also acquired new tools, such as customer relationship managers (CRMs) or more effective web platforms. The Capacity Build Grants JJF provided for strategic plans or evaluations helped recipients of the Scaling Build Grant identify and pursue growth opportunities.



““ Their dollars go very far - unrestricted - that what makes a nonprofit able to do its work. When we launched our plan, we doubled staff and impact. That was a direct result of their investment.

Many of the Build Grants' features align with field-wide best practices. Scaling Build Grants offer organizations significant, multiyear, and unrestricted funds. Build Grants provide structure to grantees by supporting the development of strategic planning and operational assessments without restricting funds to those processes. Grantees reported a relationship built on trust between themselves, JJF program officers, and other JJF staff, making aligning around Build Grant goals easier. The Build Grants' design and JJF's investment in trusting relationships are in line with capacity building best practices.¹

Grantees desired more clarity around non-monetary support. Build grantees were unsure of the non-monetary support that JJF offered as a part of the grant. Organizations with newer relationships with JJF, in particular, felt hesitant to ask for specific additional support and more uncertain about what type of support JJF regularly offers.

Anxiety around financial sustainability exists for nearly every grantee. Grantees consistently reported concerns over their ability to sustain the growth they achieved with the Scaling Build Grant and advocated for stronger supports from JJF to grow their capacity in this area.

¹ Third Plateau, "[Capacity Building Grantmaking Best Practices](#)," Jim Joseph Foundation, January 2023.

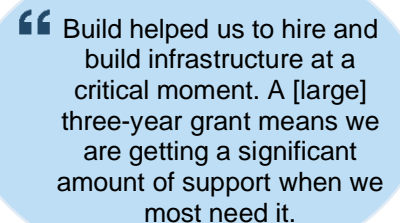
Grantees reported confusion regarding the potential for JJF support post-Build grant. Despite JJF's efforts to explain post-Build opportunities, this topic was a consistent source of confusion and anxiety for grantees. This concern was particularly pronounced in organizations with relatively newer relationships with JJF. These organizations were unsure of the likelihood or possibility of continued JJF support and reported challenges planning for future years without this information.

• **Build Grant Strategy Successes**

The Build Grant strategy has achieved many successes to date. This section details the elements of the Build experience that grantees reported as effective. Some of these successes came from the structure of the grant itself, while others were the result of the grant empowering organizations to build internal capacities, and pursue large-scale growth. The grant's significant investments and support from JJF staff created opportunities for grantees to increase their programmatic reach and develop their internal infrastructures effectively.

Effective Elements of the Build Grant Structure

Through the design of the Build Grant structure, JJF has succeeded in supporting current grantees to make notable progress on their strategic and organizational growth goals. In line with field-wide best practices, Scaling Build Grants are a significant, multiyear investment of general operating funds.² The effectiveness of Build Grants also relies on supportive and trusting relationships between program officers and grantees and offers a low-burden selection process for prospective partner organizations.



“ Build helped us to hire and build infrastructure at a critical moment. A [large] three-year grant means we are getting a significant amount of support when we most need it.

The core grant structure of making significant, multiyear, general operating investments has been highly effective. Build Grants have supported long-term organizational health, reducing financial pressure and giving organizations the space and resources needed to grow. The Scaling Build Grant structure is largely aligned with field-wide best practices for capacity building.³ Grantees reported that JJF's grants enabled them to build operational capacity and largely cover the full cost of scaling - both in terms of programmatic and infrastructure growth. Likewise, JJF's tactic of providing general operating funds while asking for specific deliverables in the Capacity Build Grant phase, such as evaluations and strategic plans, before moving forward with a Scaling Build Grant, helped provide a useful framework and foundation for grantees.

The grant's focus on general operating funds has offered flexibility and freedom for grantee organizations. The increase in general operating funds has given organizations agency to invest in areas they believe have the potential for the biggest impact. Grantees expressed gratitude for the confidence JJF has in their organizations and its leaders, demonstrated by trusting those closest to the

² Ibid.

³ Ibid.

work to make those financial decisions. One grantee shared, “the greatest gift you can give is general operating support. It shows that [the grantor] trusts you and your staff to best allocate these resources.” This financial freedom allowed organizations to put energy and focus toward achieving strategic growth goals.

The multiyear structure of the Scaling Build Grant was helpful for long-term organizational planning. Stakeholders reported that one-year grants are often burdensome and include stressful reporting processes for their organization and staff, sometimes for relatively small financial support. In contrast, the three-year grant allowed leaders to plan for multiple years. Grantees also recognized the multiyear commitment as a sign of trust and partnership with JJF. One grantee shared that the Scaling Build Grant was “life-changing for the organization and life-giving for me.”

“I have extremely positive things to say about the foundation staff, they deserve recognition. They bring a lot of commitment and integrity into the process.”

JJF program officers built strong, supportive, and trusting relationships with Build grantees.

The grant structure fostered a sense of trust between grant recipients, program officers, and JJF. JJF staff created a transparent process for designing the grant in collaboration with grantees. As one grantee shared, there was a “partnership even at the level of designing the grant together. It felt like a very transparent process. [It was] collaborative - not a black box.” JJF program officers met with grantees every six weeks to check in as thought partners, helping grantees navigate various challenges and opportunities. Grantees reported feeling comfortable describing challenges to program officers and asking for insight into solutions. Grantees with previous funding relationships with JJF described significant levels of partnership and support, such as networking opportunities with funders and board members. All grantees reported helpful thought partnership on strategic plans, evaluations and/or positive publicity. Grantees reported that JJF staff were “generous with time and relationships.”

The Build Grant utilized a low-burden assessment and application process. Grantees felt that the process for receiving a Build Grant was straightforward. When grantees were initially contacted, they understood they were potentially eligible for this new type of grant and worked with program officers to envision how to effectively use potential grant funds. During the selection and decision-making process, JJF requested existing planning materials and budget projections rather than a traditional grant application, which saved organizations significant time and resources. One grantee reported that their strategic plan, which they received feedback from JJF program officers on, became the “spine” of their scaling and growth plan. Similarly, JJF staff used conversations with grantees to answer additional questions about their readiness instead of asking for written responses or formal assessments. Grantees felt that this process respected their time and was not overly burdensome.

“Having a major grant from JJF validates who you are and what you are doing.”

JJF’s reputation and the size of the Build Grants have built legitimacy with other donors. The financial commitment and JJF’s reputation helped grantees build trusting relationships with new investors, donors, and foundations. Build Grants increased grantees’ confidence and credibility when approaching other

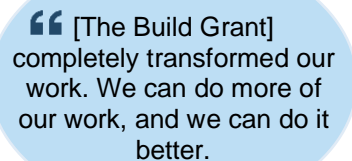
funders. According to one grantee, it was a “feather in our cap” and a bridge to bringing other funders to the table.

Build Grants inspired grantees to develop ambitious, strategic goals. The potential for a Scaling Build Grant inspired grantees to pursue more ambitious goals during their strategic planning processes, many of which were supported by JJF’s Capacity Build Grants. In the words of one grantee, the potential for a Scaling Build Grant alone “allowed us to dream a lot bigger than we would have been comfortable with otherwise.” Grantees worked with JJF program officers to consider long-term visions and set organizational goals, ensuring that they sought significant yet achievable benchmarks. This process provided a context in which grantees were given the opportunity to consider how significantly growing their organization could drive further impact toward meeting organizational missions. In addition, the monetary size of the grant - both in absolute terms and as a notable percentage of each organization’s budget - has allowed grantees to pursue ambitious growth.

Successful Impact of Build Grant Implementation

Build Grants enabled grantees to deepen organizational capacity and scale programming to reach more people. As a result of an increased investment into operating budgets, grantees significantly expanded infrastructure and pursued ambitious, strategic growth. This included hiring additional staff and/or consultants for specific projects, increasing program offerings, investing in data collection, and building out technical platforms. The quantitative data points shared below reflect both information shared in interviews and reported staff and participant growth numbers available through grant reports.

Grantees increased staff size and organizational capacity. Grantee organizations hired a significant number of new staff members, including full-time development, communications, and program staff. One grantee reported doubling their team, while another increased their full-time employees by roughly 35%. These hires changed the day-to-day operations of these organizations and enabled organizations to better leverage the existing skill sets of their leadership team by hiring people to own logistical or administrative elements of the work. More staff helped one organization to prioritize brand-building activities in addition to programmatic ones. Organizational leaders were able to focus on strategic thought leadership due to this increased staff capacity. One leader devoted more time to writing materials aimed at changing fieldwide practices, broadening their impact beyond their program participants. The investment in people enabled organizations to pursue strategic goals more effectively.



“ [The Build Grant] completely transformed our work. We can do more of our work, and we can do it better.

Scaling Build Grants helped some organizations substantially increase the reach of their programming efforts. Increased staff capacity allowed organizations to offer programs to more participants while also broadening their audiences or program offerings. Some organizations described significant audience growth. One grantee reported growing by nearly 6,000 participants, while another grew by 20% (nearly 1,500 participants) in the first year of its Scaling Build Grant. Other grantees reported smaller gains or appeared to have lower participation rates in some programs over the course of their

grants. These decreases are likely, at least in part, the result of the COVID-19 pandemic disrupting participation, particularly for in-person events.

Virtual engagement formed a key part of some organizations' growth strategies - allowing grantees to expand their audiences with a less burdensome financial toll. One grantee invested in social media content, resulting in a significant increase in the number of people who signed up for their email list, a first step toward deeper engagement with the organization. Overall, grantees reported that their growth had largely matched their initial goals with the Scaling Build Grant. However, it is too early in the reporting process for Third Plateau to validate sustainable growth trends, as more projected goals than actuals have been reported to date.

Grantees improved internal infrastructure by using funds to update operational systems and processes. Grantees invested in a variety of internal supports to better position themselves for growth. They invested in databases, staff for finance and human resources, and marketing tools. Grantees utilized consultants to identify and support specific infrastructure needs. In some cases organizations prioritized consultants or term-limited staff over full-time staff to avoid a significant budget shortfall in anticipation of the Scaling Build Grant coming to an end.

Capacity Build Grants create the strong foundation necessary for organizations to scale. Grantees appreciated funds provided for strategic planning or evaluations. These foundational processes highlighted new growth areas for grantees which they could then address with the scaling grant funding. This process also offered grantees an opportunity to align with JJF staff on metrics and goals for future growth. Grantees also shared that these grants provided an opportunity to develop or deepen a relationship with JJF before moving into a scaling phase.

• **Build Grant Strategy Challenges**

This section outlines the various challenges grantees faced while building-up internal infrastructure and pursuing large-scale growth. Some of these challenges stemmed from the structure of the grant, while others arose during implementation. Grantees named grant timelines, COVID, unexpected needs that come with staff growth, and the lack of clarity around post-Build opportunities as challenges to meeting established growth goals and future organizational financial sustainability. Many of the identified challenges in this section are not unique to the Build grantee experience but are common issues for organizations observed across the nonprofit ecosystem.

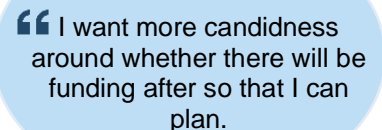
Challenges with the Build Grant Structure

The structure of the Build strategy created challenges for grantees as they attempted to reach their goals. The Scaling Build Grant timeline, while longer than many grants, still felt too short to achieve sustainable growth. Grantees also expressed concerns about the disbursement schedule, which sometimes complicated scaling efforts. Grantees also desired more transparent communication about the potential for additional funding opportunities through JJF.

Grantees reported that the grant timeline is too short to achieve sustainable growth. While grantees appreciated the multiyear commitment of the Scaling Build Grant, they still reported that hiring and onboarding new staff and developing sustainable funding sources took longer than expected. Even when grantees felt they had largely accomplished their goals, they believed they needed more time or resources needed to develop sustained funding sources to support these new gains.

Grantees grew frustrated with the grant disbursement schedule and structure. While JJF intended for the grants to decrease over time to wean grantees off of the foundation as a primary funder, some grantees reported that the declining nature of the grant disbursement schedule was an obstacle for growth plan implementation. This was exacerbated by inflation as funds lost value throughout the process. Additionally, other grantees reported cash flow challenges due to the timing of the grant. For example, one grantee reported that their fiscal year ends in December while the Build funds come in months later, creating lower cash flow for the first few months of the year. Another grantee reported that an increasing rather than a decreasing grant would have helped them achieve their goals more effectively. In contrast, other grantees struggled to build up their teams fast enough in the first year and reported that having more capital dispersed earlier in the process would have helped them hire more quickly, giving the team greater bandwidth early on.

Grantees desired more transparent communication about opportunities for additional support. Grantees expressed a desire for more explicit communication about how they could appropriately engage with the leadership at JJF. While they developed trusting relationships with their program officers, they were unsure if they could also develop connections with JJF's president and members of its board. Grantees viewed these connections as important to maintaining their relationship with JJF as a whole but were uncertain how to proceed in the absence of clear guidance or structures.



“ I want more candidness around whether there will be funding after so that I can plan.”

In addition, while program officers communicated that the Scaling Build Grant would be a one-time investment and that they would not continue to fund these organizations in perpetuity, grantees still expressed concern about the uncertainty of post-Build JJF funding opportunities. Many wanted to know for certain what their options were so they could better plan for the future. One grantee said that they “want transparency - we can't plan for the future without [JJF].”

Challenges with Build Grant Process and Implementation

As grantees pursued their goals through Build Grants, they faced challenges as they attempted to hire new staff and negotiated tradeoffs between reach and depth while growing programs. Grantees also reported concerns about the sustainability of their scaling investments, which had significantly raised their annual budgets.

Grantees experienced unexpected growing pains. Scaling Build Grants helped create the conditions for organizations to significantly increase their full-time staff size within a relatively short period. Grantees reported unexpected challenges around hiring, supervision, and navigating culture change as they onboarded new staff. One grantee noted that “doubling staff and adopting new systems is really intense

in the short-term. We spend tons of time in meetings with all staff, helping to move things forward.” One organization reported that they ended up having to hire multiple people for a single position due to a lack of fit, while another grantee spoke about how unprepared the existing staff were to take on supervision roles for so many new hires. While they are now working to offer professional development for supervision, the grantee wished they had known to budget for this shift beforehand. External factors, such as the pandemic and the move to remote work, added additional difficulty to the onboarding process for new staff. Organizations needed to learn how to build and maintain a healthy workplace culture amidst so much remote growth.

Grantees had to make tradeoffs between breadth and depth. Grantees navigated tensions between increasing their reach and deepening the quality of their current work. While they increased the total number of program participants, they remain uncertain about the extent to which the Build Grant supports deepening engagement with participants. For some leaders, this uncertainty created concerns for future JJF funding opportunities, as they did not know how JJF would view a substantial increase in deep engagement versus increases in less intensive engagement.

“ There is a looming deadline and a cliff - they might fund us but might not.

Grantees reported significant concerns about future financial sustainability. Scaling grants required organizations to significantly increase their yearly budget over multiple years. This was a common point of anxiety for grantees as they raised concerns about their ability to fundraise to meet these new budgets once the JJF grant ends. If unable to maintain existing budgets, they were unsure if they could maintain their expanded programmatic offerings with a smaller budget or potentially fewer staff members. One grantee shared, “the Build model works. It falls apart at the cliff.”

Grantees shared that any fundraising benefits from the organization’s increase in reputation took much longer than expected to materialize. Rather than gaining significant additional funds in the first year, it took 2-3 years for this increased credibility to result in new fundraising dollars. In addition to the budgetary challenges organizations face as the grants wind down, financial sustainability concerns have also created stress for organizational leaders. One described the Scaling Build Grant as “nerve-wracking” because of future financial sustainability concerns. Another shared, “when our monthly operating expenses double [and] when resources lag behind us, it puts pressure on us.” This challenge results in organizations spending significant time, energy, and resources fundraising, diverting focus away from the implementation of other aspects of their strategic growth plans.

COVID-19 had a significant impact on funding, onboarding, and program execution. Grantees who received funds before and during COVID-19 reported challenges from the pandemic. The economic uncertainty that came with COVID-19, followed by significant inflation, both reduced the monetary value of Build Grants and created more uncertainty regarding their future value. At the same time, grantees were grateful that JJF maintained their grants during the pandemic, especially those that had to pause programming due to pandemic restrictions. Grantees viewed maintaining funding as a strong show of support during the pandemic.

COVID-19 also impacted programming, particularly for organizations whose primary interventions required in-person connection. Social distancing delayed programmatic growth or the implementation of

new in-person programs for these organizations. Still, some grantees reported that the pandemic increased demand for their virtual services, supporting their growth. In particular, grantees with significant web presence before COVID-19 felt that the pandemic increased participant engagement.