Feasibility Study Regarding Brandeis Alumni Interest in Philanthropy Education

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To advancing and increasing social justice philanthropy

The author wishes to acknowledge the considerable help of her colleagues and volunteer reviewers. Even a relatively small survey and its analysis involved the work, encouragement and ideas of many.

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To my research assistant, Kate Szczterbacki, MA ’10--having a partner and “chart maker” were just some of the great assistance you provided.
Feasibility Study Regarding Brandeis Alumni Interest in Philanthropy Education

Universities continually seek strategies to engage their alumni. Students may spend four years getting an undergraduate degree or even longer doing graduate work, but the majority of their lives are spent as alumni. Keeping alumni engaged and providing service to alumni is a task generally tackled by alumni affairs and relations offices which roll out reunions and other events that are aimed at promoting life-long involvement with their institution.

The founders of the Sillerman Center, Robert FX ‘69 and Laura Sillerman intended their endowment to, among other things; provide a service to the school’s alumni through philanthropy education. Consequently, the Sillerman Center undertook a feasibility study to explore alumni interest in a continuing education program and/or events designed to assist them in their philanthropic decision making.

This report relays results from this study, which was conducted over a period of time that spanned 2009 and 2010 and involved thirty-two philanthropic Brandeis-affiliated donors. These individuals are mostly alumni but also included non-alumni who were connected with Brandeis University as a spouse of an alumnus, graduate student or as University trustees.

The purpose of the study was to determine whether alumni (and other donors) would consider attending philanthropy education sponsored by their alma mater. Qualitative interviews were conducted to better understand the needs and desires of alumni. Our findings and learnings will guide the Sillerman Center’s course of action in offering philanthropy education and may have broader applicability to other institutions of higher education in regard to their own alumni.

Although this study is based on a small group of Brandeis alumni, we surmise that the results and the process might be of interest to other institutions and groups who are concerned with providing philanthropic service to their alumni, or their clients. The notion of researching the opinion of a group to assess interest in an activity is a basic step in planning. The notion of participating with others who are linked to an institution and thus have experiences in common, such as a shared alma mater, for the purpose of continuing philanthropy education was of interest to the Sillerman Center. If our findings or our process is valuable to others, we are pleased to offer assistance to those who may wish to plan their own survey or programming.

The Sillerman Center’s study was based on the hypothesis that having a shared connection through an alma mater (Brandeis) with a common college experience base and similar social justice values would be a motivating factor to attending sessions to examine and learn about improving one’s own philanthropy. We were exploring whether philanthropists might be more amenable to attending workshops or sessions about philanthropy, given their University affiliation. Part of the educational opportunity would involve sharing with peer philanthropists in a safe and familiar environment promoting frank discussion.
We had also wanted to explore whether the neutral intellectual pull of a University learning environment would be a factor.

One key question that we attempt to examine is whether there is enough interest and need to make the planning and expense that goes into program design and recruitment worthwhile.

While the Center is fully aware that creating this type of opportunity has challenges, exploring the notion with potential “customers” seemed an appropriate and obvious first step in this exploration.

**Background**
The Sillerman Center for the Advancement of Philanthropy is a research center based at The Heller School for Social Policy and Management at Brandeis University. Endowed by Robert '69k and Laura Sillerman in 2007 and inaugurated in 2008, its mission is to strengthen social justice philanthropy through research, education, leadership development, and practice.

Since Robert Sillerman is a Brandeis University alumnus, the Sillermans suggested that one of the Center’s education functions should be directed at “giving back” to the alumni body. Another Sillerman interest is to increase the number of people involved in philanthropic pursuits and by doing so, increase the amount of philanthropy available to non-profit organizations. Donor education sessions that encourage alumni to discuss philanthropic strategies with a peer group of alumni combines two of the Sillerman’s stated interests.

We believe the results of this survey could have implications within higher education more broadly. The results may resonate with others at colleges and universities who seek to create and sponsor philanthropic education programs for their alumni.

**Method:**
The Center developed a questionnaire for a group of Brandeis alumni that also included other donors to the University such as Brandeis trustees, students, and spouses of alumni. The University development office assisted Center staff in developing a list of potential participants. The fifteen question survey was administered in person or by phone to thirty-two respondents. Understanding whether this target group would seriously consider attending Brandeis sponsored philanthropy education was a primary focus and if so, what type of format, topics, participant group, and presenters would be most attractive.

**Sample Selection**
The thirty-two people who were interviewed were selected in conjunction with the Brandeis University development office, the Heller School, and other key informants. The original goal to sample twenty people was increased to thirty-two due to a very positive cohort response to participating.
Characteristics of respondents

Geographic: Eleven respondents currently live in New York, eleven in the Boston area, and the remaining ten are divided among Philadelphia (3), California (2), Michigan, Arizona, New Hampshire, Connecticut, and Israel. Location as an important theme for planning since Brandeis alumni are geographically diverse was a factor to consider in locating programming.

Gender: Twelve of the respondents were female and twenty were male.
Gender of Alumni Interviewees

- Male, 20, 62%
- Female, 12, 38%

Age:

Two respondents were in their 30s, three in their 40s, thirteen in their 50s, nine in their 60s, and five in their 70s. Age is an important consideration for designing programs, as one age cohort may be more interested, for example, in how social media plays into their philanthropy while another might be more concerned about transferring philanthropic values to their children or grandchildren.
Annual Giving: A question about the respondents’ annual levels of philanthropic gifts was added after the 12th interview when it had developed as a factor that might segment people into different interest areas. The remainder of the sample divided roughly into ten respondents giving under $50,000 a year, one between $50-100K, eight over $100K, and nine over $500K (which includes some giving millions annually). Two respondents were board members of foundations where the giving was over $1M; one was significantly over that by a factor of 100.

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<tr>
<th>Annual Giving Level</th>
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<td>Under $50K</td>
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<td>Over $500K</td>
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Status in relation to the University: Twenty-seven respondents are Brandeis alumni, twenty-four undergraduate and three graduate alumni; one is a current graduate student, and four are “friends”, (trustees, Brandeis National Committee member, and a spouse of an alumnus).
Findings:

Value, quality, size, geography, are top priorities

Our interview responses directed us to conclude that short, high quality value added roundtables which were easily accessible to respondents were of interest. While this is not too surprising, it certainly directs the Center programming toward a one evening, plus one day in length limit. This of course dovetails with the concern for any programming; busy schedules and what it would take to capture that audience for a philanthropy workshop. Brandeis is located in the Boston area, but many of the alumni are dispersed around the country, locations such as the New York Brandeis House were mentioned as a necessary antecedent for those living in the New York area and could capture attendance for not only those living in New York but in surrounding areas such New Jersey and Philadelphia.

Being an alum of the University
The Brandeis factor—swung both ways. Respondents felt that having workshops sponsored by the University that they attended was of positive or neutral value, but in terms of marketing the workshops, almost all advised us to be extremely separate from the development agenda of the University. Clearly identifying the workshops with the Sillerman Center for the Advancement of Philanthropy and not the University writ large was the caution that resonated with most participants. The shared values of alumni and
the connection of Brandeis with social justice was highlighted by respondents as a positive factor.

But not all thought the Brandeis factor to be a plus. One respondent voiced an opinion that Brandeis did not have anything to offer in the philanthropy area. Two respondents did not see themselves as candidates for philanthropy education no matter who sponsored it, either because they didn’t like coming to meetings in general, or because philanthropy education did not fit in with how they saw themselves (“not as a philanthropist”).

An interesting phenomenon occurred during the survey interviews themselves: there was greater skepticism at the start of each interview, but an increasing enthusiasm as the questions continued and the interviewee had a chance to warm up to the idea, picture themselves in such a setting, and present their own opinions of what might be valuable. This may speak to the need for a greater amount of “advance work” in preparing for workshops with the exact audience to be invited rather than simply sending an invitation.

**Motivation**

In response to the question of what would motivate respondents to attend a workshop on philanthropy, comments such as the following were offered:

*It wouldn’t take much to persuade me to come to Brandeis for a course or workshop on philanthropy. Brandeis feels like a good fit and to be with other philanthropists that have those social justice values…would flow with what is special about Brandeis (male alumnus)*

The social justice association with Brandeis was a recognizable “brand” and that was identified as a common bond amongst graduates. Others focused on logistics as relevant to attendance. Their participation would depend on the program not being too many days in length, not too late in the evening, easier to attend if at Brandeis House in New York (from alums who resided in NY and Philadelphia), if the speakers were educational and “really interesting,” and the participants themselves were of a high caliber.

Most indicated that an interactive program that was professionally moderated was the most attractive format. Some voiced concern about who the participants would be, and more than one respondent insisted on strong professional facilitation to keep any one individual or individuals from dominating group discussions.

**Philanthropy topics of interest**

When queried on topic areas that would motivate attendance, there was a wide divergence and a caution that selection by topic might alienate more than attract: “it would be hard to be in a room if one person was passionate about saving whales and the other about HIV prevention and the topic was only one of those.” This suggests that
broader, more universal topics that were not dictated by single interest areas might have broader appeal.

The topic areas, issues or characteristics of a workshop that were mentioned by those interested in possibly attending were quite disparate—indicating another challenge: how to get enough interest around a few focused topics? The responses fell into six broad areas concerning content areas and philanthropic tools which might be of interest. These were specific workshop topic areas around donors’ funding interest, e.g. a content area such as health, or process areas such as influencing outcomes, or understanding how to make a greater impact with one’s philanthropy on social policy, other what we termed as “tools” such as evaluation techniques. Additionally participants suggested their own areas other than the ones we suggested as prompts. Those included networking, family, and intergenerational issues, as well as program qualities necessary to gain the respondent’s participation.

Workshop topic areas of interest to respondents

- Human rights
- Youth
- Housing
- Anti-poverty
- Health
- Pro choice
- International philanthropy
- Disability
- Tax and estate planning (but creative, not what you’d get from your accountant)
Response to What Issue Areas are Important Enough to Motivate You to Attend?

- Health
- Arts
- Education
- Youth
- Child Welfare
- Housing
- Anti-Poverty
- Jewish Issues
- International
- Other

Tools to be a better grant maker/funder
- Program evaluation techniques, how to tell if your dollars are really making an impact
- Best Practices as practiced by successful high impact organizations worthy of investment
- Family foundations vs. donor advised funds; advantages/disadvantages of each
- Financing for non profits

How to influence outcomes
- Policy
- Understanding the government’s role in the non profit world
- Increasing philanthropy amongst your peers
- Strategies to help people see the impact of their donations for areas less tangible than linking scholarship recipients and scholarship donors

Networking and leveraging funds
- Creation of alumni donor networks to help philanthropists be more effective. Leveraging the connections of others in areas of overlapping interest
- Skills in analyzing proposals and working as a non profit board member
- Ability to look at and analyze budgets of grantees
Family issues
- Discussion of how much to leave children vs. charity and having a safe place to discuss that...intergenerational issues

Qualities a program needs to have
- Value added, goal oriented, specify what people will know at the end of the workshop
- Not anecdotal
- Tell people what they really don’t know about giving
- Star power, big names
- Skillful facilitation; don’t let strong participants dominate
- Conduct a survey about something, and have facts from that survey to present at sessions
- Inspirational
- How to go from good to great
- Don’t be too academic
- Short in time
- Small intimate settings where participants interact with each other and faculty, that is real value
- Hear real live cases about how philanthropy makes a difference and had direct effect/life changing.
- Strategy, Case Method
- An additional resource for getting directed answers to specific questions, not in a class setting; e.g. clearinghouse
- Join people for collective philanthropic action on a topic
Format for a philanthropy education event

Since our survey attempted to extract preferences for the format of the programs per se, we asked specifically about items such as ideal length for a workshop and whether a more virtual format would be appealing, what type of participants would respondents want to be with in a group, etc.

Most respondents thought that a summer institute, which the Sillerman Center had initially envisioned, was not practical (people on vacation during that time, too long in length). On the other hand, a minority of people said that a two day meeting was too little to really process information.

Almost no one said that an online experience, conference calls, or video conferencing would work for them. The overwhelming response was that the connection and bonding with others was mandatory, though several mentioned reading assignments or some online presence or video conferencing as a follow up to in-person sessions as a good reinforcement and follow-up. Younger respondents and those traveling from the furthest distance were more likely to be interested in that type of follow-on.

People were largely interested in speakers who had known expertise in an area, e.g. successful philanthropists with name recognition or known leading experts in a particular field. Individuals mentioned included Bill and Melinda Gates of the Gates Foundation, or noted investor Warren Buffet, Andrew Tisch, co-chair of the Loews Corporation, Ann
Tisch, former NBC reporter, Les Wexner, CEO of The Limited, and Professor Robert Kaplan, a Harvard professor and author whose focus is on performance and systems; strategic implementation and operational excellence. Several also listed faculty with deep expertise as acceptable speakers for specific content areas.

Small settings preferred
Small group settings, e.g., a roundtable were particularly noted as preferable, if that setting was well moderated. Some suggested that the format should be highly structured so that each participant would have a specific amount of time to speak. The people that envisioned those rules were speaking about small groups defined in size, perhaps no more than eight to twelve people. Respondents seemed concerned with the ability to speak freely and frankly and mentioned confidentiality as an important ground rule. Some cautioned that they would never attend to hear someone else’s anecdotes and small settings might contribute to supplying a platform for that type of monopolizing. The voice against conference calls was loud and clear as many confessed to being on conference calls when other things in their office were actually getting their attention.

Other models with larger groups and smaller break out sessions were also suggested. These involved a model of a dinner speaker with great appeal for the whole group, and then sessions the next day that where topics or tools in philanthropy afforded a choice.

Regarding an appropriate venue other than on campus, professors’ homes were mentioned. It was said that this setting ties in the Brandeis experience while providing a less institutional, off-campus setting.

Overall? Most respondents said their format preference would be to have roundtables with peers (as a setting that was most comfortable) conjoined with expert speakers. The intimacy of the settings and the availability of the experts were both important.

Brandeis as a selling point
Most respondents saw Brandeis as a positive selling point for philanthropy education. Sixteen percent said that was because of the social justice elements, sixteen percent said because of common experience that alumni share, and another sixteen percent cited, “like minded people.”

The only Brandeis-related concern people voiced was whether there would be a development agenda associated with this workshop. When asked directly if they had concerns about this (several mentioned that issue even before getting to a specific survey question which asked that directly), over half (n=32) of the sample said they were not concerned because they already give generously to the University. Strategies to alleviate any discomfort around this issue were suggested by respondents and included the advice that in any marketing materials to prominently feature the fact that the strategies to be discussed were not about their Brandeis philanthropy but about philanthropy in general, During the interviews, a couple of respondents were under the impression that the philanthropy education being discussed was about their Brandeis philanthropy, despite
explanations to the contrary. These individuals were interested in hearing about a variety of Brandeis programs.

**Previous attendance at philanthropy workshops**
The overwhelming majority of respondents had never attended a workshop on philanthropy. For those who had, most sessions they described seemed to be centered on fundraising for a cause they were active in, rather than on strategic issues related to their own philanthropy.

Respondents’ prior association or experience with philanthropy workshops was either absent, or negative. The bonding with donors was seen as the most positive aspect for those who had any experience in philanthropy gatherings. This alerted us once again to the challenge of garnering attendance.

A few respondents reported connections to other philanthropic support institutions such as the Council on Foundations or a regional association of grantmakers but most individuals, especially in the high net worth category, had not availed themselves of philanthropy education.

That could advance a conundrum for planning. One thought, do these types of philanthropy workshops sponsored by one’s own university finally have the appeal, where other workshops did not or conversely, is this behavior of not seeking out philanthropy education reflective of an especial challenge in attracting high net worth and experienced philanthropists to the table? Those commenting on this survey, a small group we had gathered to read and review, suggested targeting audiences for a specific workshop to those giving at similar annual amounts.

**Greatest current challenges to respondents’ philanthropy:**

Most respondents said regretfully that their greatest current challenge was not being able to give as much as in the past or listed the economy as their largest challenge. Others introduced more topical challenges. Responses fell into the following areas. . . .

**Financial**
- Over 50% alluded to the recession and having less money to distribute now then in the past.

**Strategy**
- Difficulty prioritizing organizations
- Understanding what the problem is and what collaboration strategies might leverage your own goals
- Realistic expectations (“we said we’d do what, over three years”)
- Staying focused on a few main causes
• Having a real impact with scarce resources—how to increase the likelihood that one would have the desired impact
• Greater social need,
• How do you cut back in the face of greater need
• Communicating to the grant seekers about current realities and managing expectations
• Sustainability

Next Generation
• Getting the next generation involved
• What to leave children vs. charity and a place to discuss that issue frankly in a safe environment
• Giving my children enough to have everything but not enough to do nothing (male alumni response quoting Warren Buffett)

Knowledge
• Why good theory does not work, because (stuff) happens
• Getting an in depth understanding of the social issues, problems, and organizations
• Getting smart enough in what you want to do so you can do it well
• How to know if you’ve made an impact

Time
• Not having enough to do it “right”

Operations.
• Hiring and holding people accountable

Tax
• Tax implications to maximize one’s giving
• Feeling besieged by greater legislative scrutiny, IRS, tax laws
Response to question: What are the greatest challenges to your philanthropy?

- Financial/Economic Concerns
- Too Many Requests
- Motivating Others to Give
- Involving Next Generation
- Staying True to Focus
- Getting a Deeper Understanding of Issues
- Time

We asked whether the aforementioned challenges could be tackled in a workshop with group support. The majority of respondents thought some of these issues (not the economic issues or the dwindling resources many of them were experiencing) could be tackled in a group setting.

Barriers to attendance?
Respondents named time and geographic location as the biggest barrier to attendance. These barriers could be mitigated by perceived value based on uniqueness, high quality of the program, or an educational experience that they could not obtain elsewhere.
How much are participants willing to pay for a philanthropy education program?

There was a wide range of responses to this question about how much one should pay or not pay for continuing education on this topic. Answers ranged from the workshop should be free to a fee of $2000, depending upon on the length of the program. However, $100 to $500 were the most frequently cited price points for an evening dinner with some programming and a subsequent day-long session. One respondent said that if someone is giving away $500K per year, then to not spend $2K a year to get it right would be “stupid.” (male, alumnus). Another respondent mentioned that if a program were free, it would seem like a “cultivation event” with development overtones, providing insight as to how the perceived goal of a free workshop might be received. “Charging money for the program puts it in the continuing education category” (male alumnus).

Exploring philanthropy from the Jewish tradition

Since Brandeis is a predominantly Jewish supported institution, we inquired about respondents’ interest in philanthropy from the Jewish tradition and perspective. Sixteen respondents agreed that it would be meaningful to explore philanthropy from the Jewish tradition of giving. One respondent said that “is in the Brandeis DNA”.

Response to Question: What are barriers to attendance for you?

- Time: 19
- Schedule: 6
- Geographic Distance: 10
- Competing Priorities: 10
- Expense: 3
For Jewish Donors: Would it be meaningful to explore philanthropy from the Jewish tradition of giving and spend time understanding how your own philanthropy can be connected to these roots?

Yes, 16
No, 6
Neutral, 4

Alumni Respondents’ Interest in a Blue Sky Exercise

The survey also included a question about whether a “blue sky exercise” would be useful. A blue sky exercise entails pretending one’s philanthropy currently has no focus or strategy, allowing one to start from the beginning and construct his or her philanthropy anew (hypothetically). Fifteen respondents thought that would be a good exercise, four thought that it would be good for others but not for themselves, and two said no. Respondents who were neutral or said no were either too early in the philanthropy process or already had a strategic direction they had labored over (thus even envisioning starting over was too close to what they had just gone through to create a strategy).

Philanthropy and Its Relation to Social Justice

Our final question concerned social justice and whether philanthropy could make a difference in addressing inequity. Most answered that “of course” philanthropy could make a difference in regard to inequality and thought the question itself was not useful. Many equated philanthropy with addressing inequity at least in the mind of the donor. This was summarized by one respondent who said, “philanthropy is social justice”.

One respondent mentioned “an emphasis on advocacy” for social change and that philanthropy can play a role in advocacy. Another mentioned that “philanthropy is the sector that can address social issues” and another said that the “philanthropic role is to experiment with social solutions” and especially in times of fiscal crisis, “a foundation had a role and responsibility in social justice.”
Suggestions from respondents beyond our questions

During the discussion, many respondents had valuable suggestions for planning and creating this type of program as well as for the Sillerman Center in general. For example, one respondent suggested that the Sillerman Center should shine a spotlight on social justice philanthropy by sponsoring a social justice philanthropy award.

Another individual thought that different levels of philanthropy education should be offered. For alumni who may be just entering the world of philanthropic giving, a sort of Philanthropy 101 should be offered. As they progressed a person could take the 201, the 301 and so on up to experienced, well seasoned, and very high net worth philanthropists. Topics in the “101” level might include governance, service on nonprofit boards, and the role of assisting nonprofits with fiscal issues that might approximate what was an important experience for an “entry level philanthropist.”

The person who mentioned incremental levels also suggested piloting broader programs for alumni through the alumni office via video conferencing and not sponsoring in person workshops until the waters were tested. However, this individual’s opinion has to be taken in the context of the overwhelmingly strong interest of others surveyed in connecting with others in person and how for many, that is the “magic”. As well as the strong sense of de-coupling from the University development office.

Respondents were also interested in the networks that could form during an alumni philanthropy program or workshop. Networking opportunities could lead to future collaboration or advancement of their own program implementation by getting to know those with connections to policymakers, political leaders, and other movers and shakers.

Respondents emphasized the importance of knowing and defining the target audience. What is appropriate for one group of donors might be of no interest to others. This response underscored the importance of having a keen sense of potential participants’ interests and needs, keeping donors with similar giving levels together in an audience, and may point to running a series of similar workshops but targeted to different alumni audiences.

Summary

The intent of the survey was to explore interest in Brandeis-based philanthropy education. Respondents indicated an appetite for this activity and the great majority did not see any barrier to having Brandeis be the sponsor of a philanthropy education program, in fact the brand seemed a selling point. While people wished for diversity in offerings and targeted approaches, there were enough common ideas to appeal to donors at different levels. The challenges to attendance - time and schedule, geographic distance, and in some cases cost of the travel and program – would likely be similar no matter what kind of program was offered. However, these barriers are most likely multiplied for these respondents who have so many competing philanthropic, business, and other interests.
tugging at them. This high net worth group is also besieged by requests to speak or participate on boards. It is hardly surprising that attracting their attendance would be one of the largest challenges in creating a philanthropy education program. However, lack of interest in this type of education or programming, which we suspected might be more prominent, was not found. Instead we found a real yearning to learn, to be more effective, and to decrease the isolation of being a philanthropist.

The key message to us as a Center endeavoring to bring philanthropy education to alumni (which may be extrapolated to other college and universities) is that an educational program in philanthropy has a real chance of success if the program can be distanced from the institution’s need for funds and instead provide something more accessible and meaningful to the institution’s alumni and Trustees delivered by a neutral source. But in any case, it may be most prudent to start small and test the waters before bringing the program to scale. The Sillerman Center will discuss our survey results amongst our University and philanthropy colleagues and in the future decide whether developing programs for our University community seems in the best interest of the Center’s mandate to advance social justice philanthropy.