

# Do and how Philanthropic Foundations Work Strategically?

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## Abstract

Strategy in philanthropy is used as a framework for decision-making, and a tool that consolidates the modes of actions of grantmaking foundations, increasing their ability to achieve real impact over their areas of activity. Despite the clear advantages of employing strategy, most foundations still do not use it as a focal management tool. For the current study, the CEOs of fifteen foundations were interviewed. The data collected was sorted according to central categories. Findings from the analysis process were reviewed against earlier studies in this field, and show that foundations *do* apply strategy, but only as a partial tool. They also indicate difficulties encountered by foundations in applying these processes. Particularly noticeable was the absence of a broad model that allows foundations the option of optimized strategic management. Findings indicate that mainly young, small-scope foundations are having difficulties applying a broad model of strategic management. They are likely to operate without a deep understanding of their area of activity, decreasing their ability to choose the alternative with the greatest chance of producing outputs. While at times the foundations define how to choose their grantees, they do not define principles to guide them in ways to improve the performance of the nonprofits they fund, and are far from being able to ascertain whether they have created social impact.

## Introduction

The purpose of this study is to explore whether philanthropic foundations maintain clear consolidated strategic plans, and if they do, how they are manifested in the foundations' activities and working principles.

The importance of using strategy as a management tool is becoming more common among philanthropic foundations. Donors have come to understand that despite pouring tremendous resources into foundations, no significant social changes occur. As a result, some foundations began consolidating strategies to impact on the foundation's principles of operation via the strategic decisions taken (Bailin, 2003). Before examining these issues, it is important to understand strategy in general, and the goals it serves.

### What is strategy?

The word "strategy" derives from the Greek "Strategia", meaning "generalship". A strategic process defines the mission of the organization and indicates the path it will take from its current status to its desired status (Mintzberg, 1994). Strategic management allows the business organization to better cope with the competitive marketplace and to ensure that the organization is committed to financial success and achievement. The planning process contains elements of defining the goals of the organization, collecting information about the organization and its

positioning in the environment in which it operates, and choosing one avenue it will employ to reach its goals. It ends with defining the principles and implementing the norms according to which the organization will conduct itself (Perry, 2001).

### **Strategy and the Third Sector**

Some researchers and CEOs at the social sector claim that strategy is a business tool with one main purpose: enabling to maximize profits in a competitive market. For this reason, they consider it irrelevant to the social sector. By contrast, a growing group of theorists and social sector leaders draw the link between organizational strategy and increasing organizational achievements in the third sector. Strategy is perceived as an essential tool that creates the necessary continuum between the organization's mission and main goals, and its daily tasks. Linking of vision to organizational mission and goals, allowing the organization to focus and prioritize its tasks in accordance with its resources, allows the organization to define its best avenues of social impact (Anderson, 2006).

### **Philanthropic foundations and strategy: definitions and characteristics**

Strategy as a philanthropic managerial tool was adopted initially by philanthropists from the business world who wished to duplicate their business success and import their knowhow and abilities from the business arena into the social sector (Shimoni, 2007). An outcome of this move was the development of the discourse on similarities and differences between philanthropic foundations and venture capital funds. The literature notes several similar characteristics: both share the same goal of choosing the best possible track for returns on investment. The main activity is choosing organizations worthy of investment. These will be organizations capable of developing and implementing innovative ideas relevant to the needs of the environment and which achieve this aim through particularly effective means. Such views lead to the conclusion that if philanthropic foundations wish to succeed, they must adopt the management norms of venture capital funds, one of those focal norms being to structure and apply strategy (Grossman, et al., 1997).

Despite the existence of several elements of similarity in venture capital funds and philanthropic foundations, there are also significant differences between the two: they do not aspire to the same mission, the former being established to produce financial profit for the capital investors and the latter to assist and improve the state of society. The differences between the two types of organizations also manifests in the relationship between the funder and the organization: venture capitalists end their liaison with the organization once the latter has become profitable and creates financial returns for the investors, whereas philanthropic foundations may frequently cease their investment for reasons having nothing to do with the organization's ability to continue producing new sources of income (Young, 2003).

Studies have indicated that structuring strategy is necessary for foundations seeking to shape social change. The views expressed in these studies demonstrate that foundations that apply strategy as a central managerial tool increase their chances of achieving their goals and consistently creating social impact over the long term (Meijs, 2010).

A study conducted by Buteau (2009) for the Center of Effective Philanthropy defines several central traits of foundations who operate "more strategically": The foundations operate in

clearly defined areas of investment, guided by a detailed description of how their resources and outputs bring about the expected results for social impact. They do not rely on what they already know, but look outside to collect information regarding the external reality in which they work. These foundations behave proactively to maintain clear criteria for choosing the most effective organizations, using coherent processes for measuring their success in meeting goals. The process of strategic management is cyclical and constant throughout the years of their existence, so they should be accustomed to structuring annual work plans and then assessing their degree of success and the relevance of their chosen strategy (Gates, 2008).

Despite these advantages, the majority of foundations still do not use strategy as a central management tool. According to a survey conducted among private foundations in the USA, just 25% of foundations do so. When looking to understand why strategy is not more popular, several premises arise. First, some foundations are driven by the wish to provide charity, and do not seek social change. For them, strategy presents no advantage. Secondly, philanthropic foundations are not driven by market forces and therefore cannot be coerced into setting achievable goals. The deficiency in methods and tools prevents examining the foundations' success. As long as it is not possible to measure achievements, the view is that there is little value to strategic planning. (Bolduc, et al., 2007). Finally, sometimes, the very lack of a clear strategy makes it possible for donors to maintain a vague profile and keep a tight grasp on control (Kramer, 2001).

### **The research questions**

1. To what degree do philanthropic foundations use strategy?
2. How do foundations utilize strategic processes?

### **Research method**

The current study adopts the approach of qualitative research. This approach increases the ability to understand the issue being researched from the broadest, most varied perspectives, and derives knowledge and explanations. It adopts an open approach, meaning that the research does not commence with basic assumptions, but rather, seeks to structure concepts and norms from within the data (Drisko, 2005).

For the current study, fourteen foundation CEOs were interviewed, of which ten were CEOs of Israel-based foundations and five were CEOs of Israel offices of overseas foundations. Interviews were semi-structured and based on open questions, allowing the interviews to flow easily and enable interviewees to express themselves openly, without necessarily responding to all subjects on the guide list. All interviews were recorded and transcribed while maintaining interviewee anonymity.

Analysis: the data collected from the interviews was sorted according to central topics (themes) and categorized. The qualitative data was divided into sub-themes, making it possible to structure meaningful new units. Sorting the information into categories was conducted with the Naralyzer program (Shkedi, 2004). Findings from the analysis process were reviewed and authenticated against earlier studies, both from Israel and internationally, in this field.

### **Findings**

## **1. To what degree do foundations use strategy?**

Most CEOs participating in the current study reported that their foundation *does* have a strategy, and only a few stated there is none. The absence of a strategic plan was explained in most cases as a tendency among philanthropists to continue conducting their affairs in the way in which they are accustomed, and the inability to show flexibility, deriving from a wish to donate at the emotional, rather than rational, level:

*There's no strategy here. It's a model of the "other" type, not structured, flexible, but which I'm trying to structure more, although their lack of flexibility derives from uncertainty.*

Despite stating that strategies exist, only a small number foundations use a comprehensive strategic plan. Most interviewees related to strategic policy from a narrow perspective that only defined how they choose their grantees:

*We have a policy paper that we check annually, and in accordance with it, we make decisions about the relevant organizations and set up a call for grant submissions.*

## **2. How do foundations utilize strategic processes?**

Analysis of the findings identifies two stages in the strategic process: planning; and application, which includes the process of evaluating the foundations' outputs.

*Phase 1 – strategy planning* - Defining the foundations' main goals and collecting information that serves as the basis for decision-making. Findings indicate that the foundations' planning processes are narrow, and focus chiefly on defining their goals. Only a few use a data collection process, or identified clear areas of activity. They explained that focusing on a specific area is uncommon among foundations, deriving from a wish to donate at the emotional, rather than rational, level:

*The choice was an emotional one, random. And the support of the village became very intensive and it's one of the places we're supporting for seven years now, since the foundation was established.*

*Phase 2 – application and evaluation* - selecting and choosing the organizations to which they provide support, working methods, and relationships between the foundations and the supported organizations, and finally, evaluation and measurement of results.

Strategy application comprises several parameters and principles. The first element relates to how the foundations choose the organizations that will receive grants. Observation of the findings indicates a clear trend: foundations that perceive themselves as strategic foundations prefer to initiate the choosing of the organizations they will support, and some have established an operating body:

*We will identify an organization operating in the field with proven practical experience with the relevant population, and we will cooperate with that organization.*

The second details the foundations' working principles with regard to the relationship with grantees, models and duration of support, and partnerships with other funders. Most participants in the current study make a decision concerning the duration of support that tends to be between three to five years. They also described high levels of involvement in the programs receiving funds;

some use support strategies that provide assistance in support of professionalization in resource recruitment:

*We're involved in all stages of the contribution, from reviewing initial aptness to follow-up and intense ties with the organization, following its receipt of the grant.... That's why we also have a staff whose job is not only to do audits and follow-up, but also to provide back-up and help by importing processes of professionalization.*

Most of the CEOs emphasized the importance of partnering with the government; some adopt a strategy to transfer programs from the foundation to the government:

*It's an action strategy which has a title: "advocacy through action". In other words, persuasion based on doing. You don't tell your narrative until you have a model that works perfectly, that's proven itself, and then you come to the government and tell them it should be taking such and such action.*

As with strategies for partnering with the government, most CEOs indicated that the foundations use a strategy of promoting partnerships with other foundations. Some consider this an essential principle:

*We'll make the effort to maximize the contribution through active partnership with other foundations, matching, and so on.*

The third determines the means and methods chosen by the foundations for evaluation and measurement. The majority of CEOs relate solely to the application of measuring and evaluation for projects and/or organizations at the individual level, pointing out their limitations in assessing results followed by the chosen strategy:

*I have to say that we have no empiric indices able to give us a good indication of whether we are succeeding overall in advancing our vision. We have none. This is because it's strongly affiliated with global events with variables that are hard to isolate. We're in a reality that's so dynamic and our area is so open to change.*

## **Conclusions and recommendations**

A passion for contributing, and the aspiration and ambition to benefit society, are the very human and humane drives behind philanthropy. But it is currently agreed that to realize this passion and create social change, and to turn good intentions of ethics-based values into real impact, philanthropy needs to use effective management tools. Use of strategy allows the foundation to conduct itself with a greater degree of responsibility, making informed choices that increase its chances for greater social impact while taking calculated risks (Brest, 2005).

The conclusions surfacing from the current study show that a large proportion of the CEOs understand the importance of strategy. However, their use of strategy is still partial. It is almost impossible to identify foundations that use strategy as a comprehensive method that connects the foundation's mission to its modes of action, focuses on its goals in accordance with its existing resources, and defines the critical factors of success and sets indices for self-evaluation (Bolduc et al., 2007).

None of the foundations participating in this research use a structured planning process beginning with a definition of the problem to be addressed and ending with clearly defined indices to measure the foundation's success in achieving its goals, and their understanding of the problems in their area of activity is limited. In the long run, lack of such mapping as part of the strategy does not allow the foundation to focus on alternatives with the greatest chance of producing outputs (Perry, 2001). The CEOs interviewed did not mention strategy that identifies the foundation stake holders or defines the relationships with them, but focuses mainly on grantees and relations with the government.

Earlier studies explain that lack of strategic plan among foundations may serve philanthropists interested in leaving the sole power of decision making in their own hands. Others explain the phenomenon by pointing to the fact that long term strategic planning is irrelevant in a world of philanthropy.. This allows donors to choose where to contribute based on emotion-based motivation or passion (Kramer, 2001). Listening to C.E.Os may also point to the possibility of lacking knowledge and relevant tools for foundations to use strategy.

Finally, Most foundations do not constitute a central axis on which to base the foundation's impact; the strategies are not measured and evaluated through any organized, fixed procedure. Participants in this study stated that external measurement, control and sometimes evaluation processes are conducted for the programs they fund. However, they do not measure and audit their own strategy, examine whether, and to what degree, their strategy matches expectations and progress in achieving its mission, nor the impact made by the foundation on the field in which it operates, and are therefore far from being able to ascertain whether they have created social impact (Gates, 2008).

Conducting evaluation and control only for supported grantee programs is not representative only of the CEOs interviewed for the current study. It is a status shared by their international counterparts who acknowledge the importance of evaluating the foundation's effectiveness and its own work. They agree that evaluating only the outputs of programs supported by a foundation is insufficient and does not show whether real change is occurring (Capers & Collins, 1998).

Checking the effectiveness of the foundation's strategy and evaluating whether monies invested by donors indeed create impact is a complex, lengthy and difficult procedure, and requires no small amount of courage on the part of the foundation and its CEO. This may explain why self-evaluation does not occur in actuality, coupled with the lack of suitable tools, knowhow, and understanding of this field (Capers & Collins, 1998).

Trying to understand the issue of how foundations use strategy, the current research shows some common trends among foundations regarding their chosen strategy:

*Grantee selection* - Most foundations are aware of the need to choose effective organizations that are able to attain optimal results, and are involved in changing the foundation's role from reactive to grant submissions, to proactively locating suitable organizations (Bailin, 2003).

This highly important process can lead foundations to a somewhat extreme position of choosing just one organization on which to focus, or becoming an operating foundation. These

approaches by foundations mean that the foundation will, in the long run, choose organizations with which it is familiar while essentially blocking others operating in the sector from proving their innovativeness or ability to solve the problems the foundation seeks to address (Brest, 2005).

The social change field is dynamic and changeable, broad and complicated, and the more that new methods and models develop in the field, the greater chance there is of a foundation achieving its mission. Realizing that operations in the field are still very uncertain, multidimensional, long term and definitely not linear means that the foundation must adopt numerous actions and avenues and seek more than just one model of operations for maximum effect. The unwillingness displayed by foundations in opening up a general call for organizations to apply heightens criticism by others of foundations' modus operandi. CEOs of the organizations seeking grants are frustrated by the foundation's choosing process which is based far more on the foundation founder's personal preferences. The organizations' representatives often feel there is no connection between their ability to show proven success and their chances of presenting that success to the foundation in order to become a grantee (Yewelberg, 2009). They also clam that this process may damage the foundation's ability to be optimally effective and limit the social sector's chances of developing and improving in seeking ways to innovatively succeed (Amit, 2011).

The findings also indicated foundations that choose to become operative and run their own projects. These CEOs feel that activating the programs themselves may increase the projects' success. It is an approach that contrasts with research indicating that foundations geared to effective results should focus on identifying and empowering organizations currently operating in the field, based on the understanding that they are more closely familiarized with the operational details. For maximized effect, the foundation should ideally assist them with the grant writing process, teaching them how to word their request and describe their programs clearly so that their progress can later be more easily reviewed (Bailin, 2003).

*Setting partnerships* - The majority of CEOs interviewed in the current study testify to strategy that seeks to create partnerships with other grantors. They chiefly note that strategy should contain cooperative models for knowledge sharing, identifying common areas of interest, and locating investment funds. Despite partnerships being considered important, obstructions to creating additional ones chiefly derive from the wish of foundations and their CEOs to operate individually, to maintain transparency, and from a fear that partnerships will damage a foundation's own needs (Carter, 2011).

Most of the CEOs interviewed in the current study noted that their strategy does include partnerships with government. These strategies are based on two central assumptions: one acknowledges the government's central role in consolidating policy and seeks to create partnerships intended to impact government policy, as well as encourage it to adopt the solutions promoted by the foundation; the second is tied to the foundation's wish to set an exit point for its support of the funded organization. This strategy derives from the perception that government should be the primary bearer of responsibility in solving social issues, and should therefore fund programs geared to social improvement (Kattan, 2002).

Many philanthropic foundations were established by donors from the High-Tech industry who wished to duplicate their business success and import their know-how and abilities from the

business arena into the social sector (Shimoni, 2007). They adopt the “exit” concept typical of venture capitalists (VCs), ending their liaison with the grantee organization once the latter has established its ability to recruit government funding. We might assume that reliance on these operational assumptions is the reason that foundations who participated in this study did not consolidate alternative strategies that encompass the possibility of the government *not* taking over the program, or refusing to fund it in the future.

### **From theory to practice**

This study starts from the assumption that strategy is an important tool for assisting the foundation in creating real social change. The concept suggests taking best advantage of the relative freedom and independence of foundations in order to promote democracy and realize social impact. A foundation should, therefore, identify a given social issue, ask itself what it wants to achieve relative to this issue, what factors need to change in order to arrive at the desired outcome, and which decisions and actions should be implemented to most effectively attain those goals (Anheier & Leat, 2007).

The conclusions indicate that the strategic foundation model is optimal for foundations that relate to the resources available to them as an investment intended to achieve visible, meaningful results in the social sector. The current study is based on these theoretical insights, and a deeper understanding of the disparity between the desired status compared to the current situation, giving rise to several recommendations for practical application:

*Management and governance* - Key processes in consolidating strategy require leadership and involvement in conducting the foundation’s affairs, especially by the donor and board members. This process of focusing on, and defining, the field of activity means that the donor will usually need to forego any dream of involvement in multiple spheres and requires both the courage and understanding that one philanthropic foundation cannot bring change to all social fields (Kramer, 2001).

The strategic process is complex and requires that the foundation ask itself to what degree it is operating effectively (TPI, 2003). The donor, trustees and board members must reveal the strength to attentively note opinions from outside the foundation, absorb other ideas and information from individuals and parties dealing with closely related issues, and accept information on its own strengths and weaknesses, including how it is perceived by the public and whether it is operating with the transparency needed to ensure that its goals are understood and clear to all relevant factors (CEP, 2010).

For actions to be taken that evaluate and measure the philanthropic organization’s own success, the donor and/or representatives must overcome the obstacle of fear of failure. They must bravely understand that philanthropic activities are complex and long term, and do all they can to succeed, but also be able to, on occasion, accept that they cannot always show success. Such a stance allows the foundation to self-audit and self-evaluate, and make changes to the strategy in order to improve (Kramer, 2001).



*The connection between academia and foundations* - The ties between academia and foundations are of particular importance for two processes: the first is that of mapping the field at the planning stage. Foundations must collect data about the defined problem, about the disparity between current and targeted status, and about any other central players in the field. Using academic researchers skilled in methodical data collection may assist in this process. There are a number of efforts to create online taxonomies of success indicators by answering the question, “What are the commonly used indicators to measure success?” Foundations may adopt common indicators and build success-measuring systems by developing partnerships with the academic experts (Bonbright, 2007).

The potential contribution of academia is in developing tools with which the foundation can evaluate itself. These must be effective tools based on valid theories, and structured so as to help foundations measure the outcomes of their work in both the short and long terms.

Additionally, foundations specializing in a specific field may serve as sources of knowledge and expertise in that field, not only for diverse grantee organizations operating in the same field, but for other foundations wishing to join and expand the scope of overall activity. Academia may be able to help foundations extend their theoretical, content-based knowledge (Anheier & Leat, 2007).

*Relationships with social organizations* - Structuring dialogue with other organizations operating in the field is important for all stages of strategy application.

At the grantee selection stage, the grant-maker should be proactive, seeking to ascertain which organizations are the most effective for realizing the foundation’s goals and desired impact. This process is occasionally confusing and creates tension between the need to implement a broad, diverse and transparent process of choice, and the selective choice of only one or two grantee organizations. It is therefore suggested that foundation CEOs clearly define the optimal organizations and criteria for receiving grants, while simultaneously providing equal opportunity to all relevant organizations to prove their abilities and become grant recipients. This is where the foundation must show transparency in its working methods and provide explanations for its decisions (NCRP, 2009).

The findings of the current study reinforce earlier research indicating the difficulty in forming a strategy that includes joint goals and standards for evaluating outcomes (Boyd, 2004). In order to give the chosen grantees a fair chance of performing their work optimally, the foundation must build ongoing dialogue with the grantee’s CEO to coordinate the relationship between them that will assist the grantee in achieving its goals.

*Epilogue – A personal perspective as a foundation CEO in Israel* - This study reviewed foundations in Israel. The sphere of philanthropy in general, and foundations in particular, are still fairly new to Israel. Nonetheless, it is possible to point to professionalization and ongoing improvement in this sphere as foundations make increasing use of tools geared to create greater impact. Doubtless a similar study, if conducted in several years’ time, will clearly demonstrate the degree to which the trend has become embedded.

However, the majority of findings and conclusions are still highly applicable to strategic philanthropy and foundations worldwide, and especially to small to medium-sized family foundations. These find difficulty in allocating large scope resources for developing management tools in general, and strategic tools in particular, suited to the foundation's size and norms of conduct.

I view this study, its conclusions and recommendations, as an important basis for communication, sharing and uniting the forces of family foundations and philanthropies, with the intent of enhancing their chances for optimal performance as they develop a mutual language and tools to support the realization of real social impact.

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