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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 EW 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, as well as considerations for future planning.

• Methodology

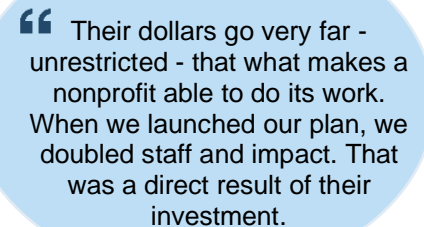
Third Plateau interviewed seven current Scaling Build grantees and one current Capacity Build grantee over the course of March and April 2023, and reviewed grantee reports. Third Plateau also interviewed two JJF program officers involved in leading the Build strategy. Third Plateau analyzed and synthesized

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. Grantees reported a relationship built on trust between themselves, JJF program officers, and other staff, making it easier to align around Build Grant goals. The Build Grants' design and JJF's investment in trusting relationships are in line with capacity building best practices.¹

JJF could create a formal menu of options for non-monetary support. Best practice literature and grantees both suggested additional non-monetary support from JJF could further assist grantees with capacity building and scaling efforts.² JJF could identify which supports it would be willing to offer and present Build Grant recipients with those options. The offer of support would be particularly helpful for grantees that do not have a previous long-term relationship with JJF, as this group reported feeling more hesitant to ask for additional support. Offerings could include connecting grantees with other JJF staff members for specific advice or networking, publicity through the JJF newsletter, or recommending consultants for strategic planning, financial scenario planning, or other services supportive of scaling efforts.

JJF could more actively help grantees build capacity around financial sustainability. Grantees consistently reported concerns over their ability to sustain the growth they achieved with the Scaling Build Grant. JJF could address this by extending the length of grants or giving grantees more time to grow their

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

² Ibid.

fundraising capacity while sustaining or growing existing programs. It could offer more direct support for grantee's fundraising efforts, such as introducing organizations to prospective funders early in the grant term or offering technical fundraising support. Supporting grantees to diversify funding streams may help cultivate organizational confidence and foster leadership's ability to sustain growth through additional philanthropic investments.

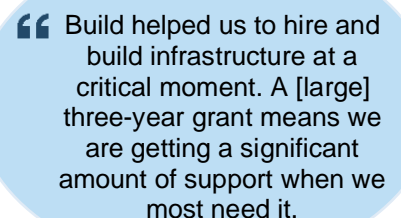
JJF could develop strategies to clarify expectations around post-Build relationships with grantees early in the process. Despite JJF's efforts to explain post-Build opportunities, this topic was a consistent source of confusion and anxiety for grantees. This concern was particularly pronounced in organizations with relatively newer relationships with JJF. An increase in direct, clear communication could ensure that grantees have a clear sense of what support, if any, they might continue to receive from the foundation after their Scaling Build Grant expires. This would require communicating whether or not a Scaling Build Grant is a one-time grant without the option of renewal or further funding, or the future paths that might be available. Establishing these expectations clearly and firmly at the beginning of the grant process or before a Scaling Build Grant is awarded will help grantees plan more effectively.

• **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.³ 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.⁴ Grantees reported that JJF's grants enabled them to build operational capacity and largely cover the full cost of scaling - both in

³ Ibid.

⁴ Ibid.