

10

Making Vets a Focus: The Weinberg Foundation extends its donor intent to a new field

For decades, the Harry and Jeanette Weinberg Foundation has been known as a dedicated funder of programs that help vulnerable individuals and families. Its \$100 million annual budget is focused on vulnerable older adults, job training, the homeless, early-childhood education, people with disabilities, and Jewish causes in the U.S. and abroad.

Harry Weinberg went to work soon after finishing sixth grade. He eventually built a real estate and transportation empire. With the proceeds, he and his wife Jeanette created a large foundation in 1959, based in his native Baltimore, to care for the poor and the vulnerable.

Weinberg left very specific guidelines about how his dollars were to be spent. The foundation would focus on the topics listed above, and target its giving whenever possible on the places where Harry had lived and succeeded in business—Maryland, northeast Pennsylvania, Hawaii, and Israel. As a real-estate developer, Harry understood how a timely building could incubate many useful human activities, so he mandated that 50 percent of his foundation’s grants should support capital projects. The other half of the foundation’s annual spending would go to flexible funding that good charities can use to cover any of the expenses they face. Harry asked that his funding not go to universities or the arts. He respected those institutions but thought they had plenty of patrons, and that his donations should go to less glamorous causes. While others “are finding the cures for all the ills of the world, someone will be hungry, someone will be cold. That’s our job,” he stated.

Harry and Jeanette Weinberg wanted to promote human dignity and independence, mainstreaming into society those who are on the margins, and moving people to self-reliance. They didn’t just fund the elderly generically, they aimed to help them age in their own homes and maintain agency in their lives. Weinberg’s deep and long-running support for people with disabilities has emphasized helping them stand on their own feet. The foundation’s education and job-training ventures aspire to enable people to provide for themselves.

Applying old ethics to a new field

In the late 1990s, the Weinberg Foundation made its first grant touching on military service—but through a back door: its longstanding donor commitments to Maryland and to Jews. A \$1.5 million grant was given to help build a Jewish chapel and activity space at the United States Naval Academy in Annapolis. Over the next decade and a half, the foundation trickled about \$6 million into additional grants that touched veterans in one way or another.

Some Weinberg grants went to prominent nonprofits that serve many populations, including veterans. Others went to organizations zeroed in on vets and servicemembers (like its grants to Fisher House, the organization that offers free housing for families of individuals recovering from injuries at

military and veteran hospitals, and to Baltimore Station and MCVET, local homeless shelters and supportive housing programs focused on vets). Like many funders, Weinberg saw veterans as an increasingly important population, and it made grants as opportunities emerged.

Then foundation trustee Donn Weinberg attended a Philanthropy Roundtable conference where he heard a new take on what it meant to support veterans and persons with disabilities. West Point professor and Iraq war amputee Daniel Gade urged the donors in attendance to focus on what veterans can do, rather than what they cannot. Rather than assuming they are broken and need aid, philanthropists should treat veterans as a resource and help them make the most of their talents. (Gade's themes are featured in his "Setting the Scene" chapter in *Serving Those Who Served*.)

This message resonated with Donn Weinberg. "It's an approach that fosters self-support rather than dependence. We want to see veterans involved in society, not reliant on disability pay unless it's necessary. That is a better and more fulfilling life." Helping veterans become civilian successes would be a natural extension of Harry Weinberg's work.

 We want to see veterans self-supporting and involved in society, not dependent. That is a better and more fulfilling life.

Though the foundation was already dabbling in veterans' funding as described above, Donn Weinberg concluded its existing work was inadequate and too generalized. The fact "that The Philanthropy Roundtable had established a new program centered on veterans gave me the idea that we should have one too." The foundation could do a lot more good if it "dealt with veterans as a focus area, not a collateral matter, touching on them from time to time." It was also encouraging to know that wisdom and experience from other donors was being collected and made available for other funders to draw on, says Donn.

Program officer Kate Soresstad, who was in charge of Weinberg's general community-support portfolio, made a suggestion to the board of directors. She noted that "veterans hit every one of our portfolios—education, workforce development, disabilities, basic human needs." A dedicated funding pool would be a chance to add sophistication to the foundation's giving, and bridge its current hodge-podge of projects into something more methodical.

The trustees liked the logic, but asked why the foundation should get involved in an area that already had massive government investment. Wasn't the government taking care of this population? What difference would a million dollars a year from Weinberg make? Donn provided the answer: "the government has severe limitations because it is a rule-based bureaucracy, is not flexible, and doesn't have the incentives to make people more productive."

Trustees also wondered whether the foundation had the expertise necessary to evaluate proposals in this new field. How hard would it be to separate out promising ideas from ones that could be wasteful, counterproductive, or even fraudulent? Many of the nonprofits now serving veterans are recently formed, and still evolving.

The trustees decided these hurdles were no excuse to sit on the sidelines. The foundation would set careful funding guidelines and then experiment with providers and issue areas in a deliberate way, and thus gradually develop expertise and comfort that it could donate money effectively to meet the foundation's goals. In January, the trustees set aside \$2 million per year for the new portfolio, and began defining a strategy.

Setting guidelines

"As a foundation, we always look to build self-sufficiency," explains Sorestad. So the foundation announced in 2016 that it would be interested in proposals for helping veterans succeed and stand on their own in three specific areas: Programs to speed veterans into the civilian workforce. Support for veterans with serious injuries, including health services, home rehabilitation, and community support. And efforts to overcome barriers that could block veterans from succeeding, like legal support, financial and other counseling, and so forth.

"We are too broad in our focus, but that's intentional at this early stage. These are places for us to start," says Sorestad. As experience accumulates, it is likely the foundation will narrow down on the most successful areas.

As with all other Weinberg grants, there is a preference for the Weinberg hometowns, but also a willingness to fund national programs that are excellent, a substantial allocation to capital projects, and more willingness to fund general-operating support than most foundations will offer. And like elsewhere, this veterans' program will honor Harry Weinberg's desire to avoid colleges, research, and art. The early veterans' grants have mostly been smaller than is typical for the foundation. This

makes a lot more work for the foundation, but fits the experimental strategy which will seek exposure to a range of issues and service providers before narrowing things down for long-term grantmaking.

Sorestad was honest with herself and others about the challenges of starting a new effort from scratch. But she threw herself into the task with relish, and drew heavily on the expertise of others, including the program in veterans' philanthropy that The Philanthropy Roundtable had launched in 2012.

Sorestad formed an advisory committee (a mechanism she had also relied upon for a major library-funding initiative she had steered). She recruited ten impressive members from a wide variety of nonprofit, business, local government, and military backgrounds. They offered her broad knowledge and judgment, as well as very specific assistance with tasks like adapting the foundation's standard grant application so it would capture the information most relevant for serving veterans.

Every month, Sorestad sends her advisory-board members material from grant applicants for confidential review and feedback. "What I love about my advisory committee is that because they come from different sectors, topics areas, and philosophical perspectives, they sometimes give very different opinions. It's definitely not a 'yes' committee. I get some really good, honest answers." To these, Sorestad adds insights from regular conversations with other funders and charities tackling veterans' issues around the country.

"This way, I can take a range of responses to the trustees so it's not just me saying, 'well, it seems like a good fit.' I get confidential information and an insider's perspective on what we should be looking at." Organizations that get an initial thumbs-up from the trustees are invited to deliver a full proposal within two months.

The Weinberg Foundation is at the beginning of its activity in this area, and may fund some flops as well as successes. But it has thoughtfully added a new permanent portfolio to support veterans in a way that both maintains its original donor intent and positions the program to get better and better over time. "I'm excited and optimistic about the honing and strengthening of the portfolio that will come through future funding cycles," says Sorestad. "We'll tighten things up. But I'm glad we decided to just say, 'Go. Let's try it.'"