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AT LUNCH WITH MELISSA A. BERMAN

Learning to Cast Bread Upon the Waters, Wisely

By CLAUDIA H. DEUTSCH

SO what do you think I am, a Rockefeller?

The saying has become part of the vernacular, trotted out when a teenager asks for a new car, a friend asks for a hefty loan, a charity asks for yet another donation. And it's usually a discussion ender: Of course you're not a Rockefeller, so of course you can't spend like one.

Or can you?

When it comes to philanthropy, Melissa A. Berman says that you can. Not in dollar amounts, of course. But she sees no reason why middle-income people should not be as skillful in supporting their chosen causes as the Rockefeller family has been in supporting theirs.

"The impulse to charity is part of human nature, so there's a sense that it's supposed to be easy; in fact, it takes as much expertise as investing in stocks and bonds," Ms. Berman, 48, said.

She has put her career behind that conviction. As chief executive of Rockefeller Philanthropy Advisors, a stand-alone, nonprofit entity created by the Rockefeller family in 2002, she helps clients identify and then support causes about which they are most passionate. Most of her clients give away hundreds of thousands of dollars; indeed, about 55 percent of the money she helps dispense still comes from Rockefeller family members. But she asserts that, no matter the amount of the giving, the questions are the same: Exactly what do you want your donations to accomplish? And how can you best achieve that goal?

The answer to the second question isn't always dollars and cents. When a reporter invited Ms. Berman to pick a place for lunch, she called City Harvest, which feeds needy New Yorkers; she serves on its board. The people there suggested Tabla, a Manhattan restaurant that donates large amounts of food to the group, so that's the one she chose.

"Philanthropy is about making change, but first you have to figure out what it is you really want to change," Ms. Berman said.

At first, that seems easy. If you want to cure cancer, you donate to the American Cancer Society, right? Not so fast. Do you care more about curing existing cases or preventing future ones? Do you want to attack a specific type of cancer, or do you want to illuminate the root causes of multiple forms of the disease? Do you want to help sufferers add verve to their remaining days, or take pain from their inevitable deaths? Are all sufferers equal in your heart, or do you care more deeply about children, elderly people or poor people without equal access to treatment?

Only after answering those questions do you know whether to donate to the American Cancer Society, the Lung Cancer Association, a research hospital, a children's ward of a hospital, a mammography clinic in the South Bronx or a group that buys wigs for those who lose their hair to chemotherapy.

Ms. Berman has little patience for people who think that one goal is intrinsically more worthwhile than another. "Sure, it is important to stamp out world hunger and to cure AIDS - but it's also important to help hungry people and AIDS sufferers now," she said. "You just can't lose sight of which is most important to you."

To get the obvious question out of the way: yes, she follows her own advice. She cares about what she calls the "fabric of life" in New York, so she donates to City Harvest and to the Jewish Board of Family and Children's Services, a social service agency serving all New Yorkers. She cares about Jewish culture and community, so she supports her synagogue and the Goddard Community Center, both near her home on the Upper West Side of Manhattan. She yearns for peace in the Middle East, so she supports the New Israel Fund, dedicated to improving relations between Israelis and Palestinians and economic opportunities for both. Of course, she cares about the private school her two children attend - but she already pays ample tuition, so she supports the school by volunteering time.

"Even as a child, I gave a third of my allowance to charity," she said. "But since I took this job, I've become much clearer about what things I want to change, and about how I can best help change them."

PROFESSIONAL philanthropy is a latter-day calling for Ms. Berman, but the role of change agent may well be programmed into her DNA.

Her father, a hematologist, spent decades studying how stem cells in bone marrow become blood cells - research that he still hopes may help in curing leukemia.

Her mother, a librarian specializing in Judaica, was once hired by a synagogue to build a sizable library. She was a refugee from Hitler's Germany, and many people expected her to focus on the Holocaust; she focused instead on the modern state of Israel, and on works of Jewish artists.

"She didn't want to build another version of what was available at other temples," Ms. Berman said. "Both my mom and dad focused on meeting needs that were not served elsewhere."

Like her mother, Ms. Berman loved to read, but she figured that she would become a research doctor like her father. A few years of pre-med at Harvard changed her mind.

"Harvard was this intellectual Garden of Eden, full of people who understood philosophy and literature," she recalled. "The people taking the pre-med courses just weren't as much fun."

She switched to a major in folklore, and went on to earn a doctorate in Old Norse from Stanford. In between, she married Richard Klotz, a mathematician.

Ms. Berman wanted a career in academia, but jobs just were not available in 1983, when she got her doctorate. So, lacking specific career training but armed with a facility with words, she wound up writing speeches for the Federal Reserve Bank of New York. Later, she worked as the overseer of research and publications at the Conference Board, the business research group. She got hooked on the nonacademic

world. "Exchanging ideas with smart colleagues was a lot more satisfying than independent study," she said.

Ms. Berman, who professes a firm belief in a free-market economy, feels no embarrassment at the capitalistic bent her career took. But when Rockefeller Philanthropy Advisors came calling two years ago, she happily switched from concentrating on the haves to catering to the have-nots. Her son, Danny, was then 13, and her daughter, Rachel, was 11. They had entered the question-asking ages, "and I wanted to do something that would make them proud," Ms. Berman said.

That does not just mean spreading around her clients' wealth; she is equally eager to share her knowledge about philanthropy. So when asked for tips on how to dispense largesse, she happily - and prodigiously - acquiesced.

The overall theme of her advice was this: Know the charity a little, know thyself a lot, and you can't go far wrong. Here are some of her specific suggestions:

Efficiency is not the same as effectiveness, so do not put too much weight on how much a charity spends on administration. "It may still be building its Web site, expanding its offices, adding on staff, running into all kinds of costs that older, larger organizations took care of 10 years ago," Ms. Berman said. If you do check out charities with organizations like Guidestar, compare them only to other nonprofits of similar size, scope and age.

It is perfectly fine to let personal preferences trump generalized need. If your mother died of cancer, cancer research might mean more to you than a struggling arts program.

It is O.K. to let your ego play into your decisions. The Metropolitan Opera is unlikely to put you on its board for a \$250 donation, but a local dinner theater might. "Don't feel bad if your motivation for giving includes personal recognition," Ms. Berman said. "If you're getting something out of it, chances are you'll give more, and more often."

Ask yourself a question: If you had the time, would you do volunteer work for this organization? If the answer is yes, write the check. "It's a way to really spot your own sphere of interest," Ms. Berman said.

Narrow your goals. Saying you want to "help children" isn't of much use. Help them do what? Learn to read? Stay out of trouble after school? Be immunized against childhood diseases? There are nonprofit groups catering to each subgoal. If you do not have the time or inclination to ferret them out yourself, the Council on Foundations (www.cof.org) can help.

Recognize how you want to see change accomplished, and by whom. Say you want to support education. Do you think that is Washington's role? Then give money to groups that are lobbying Congress for better programs. Do you want local schools to run the show? Donate to a local literacy or after-school activities program. Do you put the most trust into established nonprofit groups? Write checks to the local Y.M.C.A. or 4-H Club. "There's no right or wrong way to get things done, so pick what resonates with your beliefs," Ms. Berman said.

Decide whether you want to solve the problems of today or prevent those of tomorrow. "Some people want to make sure the symphony is playing, the park is clean, the soup kitchen still serves," Ms. Berman

said. "Others want to make long-range changes in the environment or people's lives and will support groups that are not showing immediate results."

Let the charity choose whether you donate by mail or Web site, or by check or credit card. "Each group has different cost structures, so call them and ask what they prefer," Ms. Berman said.

Don't promise to keep giving endlessly. If you don't want to be pestered with calls or mail, say that you are making a one-time donation (even if you may give again) and that you do not want to be put on the mailing or call list. "It may not work, but it's worth a try," Ms. Berman said.

Do not believe that goodness has to hurt. If a donation makes you feel less financially secure, don't make it. "It doesn't help anyone if you feel guilty into giving," she said. "You'll just learn to overcome the guilt in time, and wind up giving less."

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