

# Elite Philanthropy in Israel

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**Abstract** The paper presents the findings of a study on elite philanthropy in Israel. The study aimed to describe and analyze the scope of elite philanthropy, which has been affected by the growth and relative stability of the Israeli economy. The study also aimed to shed light on the demographic characteristics of elite philanthropists, their motives for giving, preferred target populations and areas of interest for donations, the value of donations, and the channels and mechanisms through which donations are made. The findings revealed that the average percentage of donations out of the philanthropists' total earnings was not lower than the percentage found among philanthropists in other Western countries. In the paper, we clarify the meaning of elite philanthropy in the context of Israeli society and the role of elite philanthropists in promoting social programs. We discuss the philanthropists' sense of obligation to "give back" to the society which enabled them to become wealthy.

**Keywords** Elite philanthropy · New philanthropy · Motives for contribution · Scope and range of contributions · Giving back to society

## Why is it Important to Learn about Elite Philanthropy?

The goal of this paper is to provide an overview of the phenomenon of elite philanthropy in Israel, as well as to describe the main characteristics and motives of elite

philanthropists and their patterns of contribution. Philanthropy is a time-honored value in Israeli society (Haski-Leventhal and Kabalo 2009), and the concept of charity (*tzedaka*) is deeply rooted in Jewish tradition. Israeli philanthropists are from families and social networks that emphasize ideological, moral, and emotional motives as well as motives aimed at promoting their own interests. As such, their activities are based on the premises of charity, altruism, and help for disadvantaged populations. The phenomenon of "new philanthropy" in Israel has developed over the past three decades, and refers mainly to people who made money in electronic and high-tech industries, and who want to make a difference in Israeli society. In light of the lack of knowledge on this topic, we sought to learn more about elite philanthropists and their contribution to Israeli society. In this paper, we discuss the insights we gained from a study conducted between 2007 and 2009.

## What is Elite Philanthropy?

Several definitions of elite philanthropy have been proposed. There are those who refer to elite philanthropists as a unique group, which is considered to be strategic and task-oriented. These philanthropists promote public and social efficiency and effectiveness. They initiate new programs and projects, and they seek to gain social and political influence (Katz 2005; Payton and Moody 2008; Sulek 2010). Other definitions of elite philanthropy focus on aspects such as the donor's estimated income or capital, and the scope or volume of their philanthropic activity in terms of contributions and areas of interest. According to Rooney and Frederick (2007), elite philanthropy relates to the population of households whose net worth is one million dollars or more and/or whose annual income amounts to \$200K or more, or to the population

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whose donations range from 1 million to 10 million dollars (Tobin and Weinberg 2007). There are also researchers who have distinguished elite donors as those who contribute a larger share of their income than donors who are not wealthy. Specifically, they found that most philanthropists donate about 2%–3% of their income, and wealthier philanthropists donate about 4.4% of their income (about 37% of all contributions in cumulative terms). Another interesting finding is that the lion's share of elite donations derives from earned income and not from inherited capital (O'Herlihy et al. 2002).

All of these perspectives of elite philanthropy relate to mega-donors or high-net-worth donors who contribute in their lifetime or after death. These donors are a social and cultural interest group, who seek to preserve their status and identity. In this article, the term “elite philanthropy” refers to this small group of people, who have extensive power and influence. These philanthropists differ from other donors in terms of the amounts of income, property, and capital at their disposal. They are also close to policy-makers and public officials, because they control a considerable amount of capital which is channeled to national and social programs. Elite philanthropists, who are sometimes referred to as “tycoons”, create sources of income and employment opportunities for others, but can also withhold those sources of income and prevent access to them. They control relatively large organizations that affect various aspects of life, and in that way they gain power and political influence. The sources of their power also include symbolic resources such as their reputation and social status, which enable them to influence the opinions, attitudes, and values of people who are in charge of making policies and decisions.

Our definition of elite philanthropists refers to those who make generous monetary donations to good causes which aim to promote human and social welfare. These philanthropists have been identified as a distinctive group of benefactors whose assets and capital exceed those of the “average donor”, and who aim to achieve a “second order” change (Bartunek and Moch 1987). In that way, they impact social arenas and are able propose new programs and services in areas government agencies have major problems initiating and implementing social solutions due to shortage of resources and conflicting priorities (Sanfort 2008). They are motivated by the desire to give back to society in return for the social and monetary resources that have been made available to them in their lifetime. In so doing, they are inspired by a family tradition of giving, as well as by the material and non-material benefits and rewards that they receive in exchange for contributions (Vesterlund 2006). Because these philanthropists are a unique group who seek to achieve significant change, efficiency, effectiveness, and social innovation, we believe that theoretical and empirical research should focus on their distinctive attributes, activities, and contribution to society. Elite philanthropists can serve as a role model for others, in that they have a

substantial impact on the areas that they contribute to. From that point of view, they can be distinguished from philanthropists who aim to provide instrumental responses to unfulfilled human needs, or who merely offer a voluntary service for the public good (Payton and Moody 2008).

### Elite Philanthropy in Israel

Elite philanthropy in Israel includes “old” and “new” philanthropists. The old philanthropists are well-established, wealthy families who have made substantial contributions to major social causes, whereas the new philanthropists are those who became wealthy over the past three decades in high-tech industries, electronics, and venture capital (Shimoni 2008; Silver 2008). As mentioned, elite philanthropists can be distinguished from many other donors who contribute to various nonprofit and human service organizations. Hence, there is a need to explore their distinctive characteristics of this group of philanthropists, their motives for giving, their preferred areas of interest for contributions, and the scope of their donations, as well as their impact on promoting social and national programs. The importance of this research also lies in the attempt to shed light on the transition that has taken place in Israeli elite philanthropy in the process of seeking a distinctive identity. This transition is connected to the existing relationship between Jewish and Israeli philanthropy, as well as to the need to provide more incentives for Israeli philanthropists to establish new avenues for their activity such as family, community, and corporate foundations. Research on elite philanthropy is particularly important in light of the major changes that have been taking place in Israeli society. In recent years, Israeli society has been experiencing an ideological transition from a centralist, socialist ideology to a radical liberal ideology, which seeks to reduce the government's role and encourages privatization, contracting out, devolution, and competition. In response to this process, social groups have organized protests and expressed their opposition to the social gaps that have been growing as a result of this policy. In this turbulent context, elite philanthropists can have an impact on policy makers in governmental and non-governmental agencies, as well as on public activists who are concerned with remedying social ills and governmental inefficiencies. Against that background, the goals of the study were as follows:

1. To estimate the scope and volume of contributions and giving;
2. To examine the factors that motivate elite philanthropists to make contributions;
3. To shed light on the preferred goals, target populations, and areas of interest for contributions;
4. To explore channels for donations and ways of contributing;

5. To evaluate the impact of philanthropic giving from the perspective of the philanthropists.

### The Research Design

Data collection was based on the snowball method. This sampling method is most appropriate in cases where the research population is not completely known, or in cases where there is no way of establishing contact with a large share of the population. This is the situation of elite philanthropy in Israel, where complete, systematic information is not available in any governmental and official databases—except informal information relating to wealthy philanthropists who are connected with the activities of foundations, as well as information relating to mega-donors who are identified with public activity. Based on this information, we attempted to identify known donors who make substantial contributions, and who fit the definition of having capital and assets that amount to over one million dollars. The sample also included other philanthropists from the group defined as mega-donors. In addition, on the assumption that the participants in this study had access to other people in these groups, they were asked to provide information on other people who have the special characteristics above (Panacek and Thompson 2007). Despite the limitations of this data collection method, and even though we were unable to obtain complete information about the population of elite philanthropists in Israel, we found this sampling method to be the most appropriate one for examining the social phenomenon presented in this paper (Faugier and Sargeant 1997). Ultimately, 79 elite philanthropists (21 men and 58 women) were interviewed.

Special attention was given to the philanthropists' motives for contributing, which were examined on the basis of 13 statements. Participants were asked to rank the extent to which they identify with each statement, on a scale ranging from 1 (*do not identify at all*) to 5 (*identify to a very great extent*). Preferred areas of interest for contributions were also examined. The philanthropists were asked to indicate what they considered to be the three most important areas of contribution, out of a list of 16 preferred areas. Participants ranked those areas in descending order of importance, on a scale ranging from 1 (*most important*) to 16 (*least important*). Other measures related to the scope of contributions, and to the share of contributions out of the participant's total revenue and profits.

### What Were the Results of the Study?

The results yielded interesting information about the personal attributes of elite philanthropists. The participants in this study

ranged from 31 to 83 years of age, and 67% of them were immigrants. Of the immigrants, 16% were born in North America, 10% in Europe, and 5% in Asia-Africa. Eighty-two of the participants were married; most of them (94%) lived in the central region of Israel, and only 6% lived in peripheral areas. The average number of years of philanthropic activity was 19. Only 11% of the participants were "new philanthropists" who had engaged in philanthropic activity for only 3–5 years, whereas the majority had engaged in philanthropic activity for 20–40 years. The average level of education was high. Most of the philanthropists had academic education, and about half of them had MA or Ph.D. degrees. Some of them were CEOs, some were entrepreneurs, and others were owners or partners in a private company. As for their fields of specialization, the philanthropists engaged in business and financial services, venture capital enterprises, computer and communications technologies, real estate, health services, and other fields. About 15% of the philanthropists participating in the study had assets valued at less than 1 million dollars, 19% had assets valued at 1–5 million dollars, and about 58% had assets exceeding 15 million dollars. Of the participants who reported their revenue (50%), 30% had a yearly income of one-half to one million dollars, 25% had a yearly income of 1–5 million dollars, and 17% had a yearly income of more than 15 million dollars.

The following are some interesting figures about the wealth and contributions of the elite philanthropists: The average amount of contributions for each individual participant was NIS 2,850,200 (about \$710,000). Fifty-three percent of the philanthropists who responded to this question reported that their contributions amounted to more than 10% of their earnings, 24% reported contributions amounting to 1%–3% of their earnings, and 13% reported contributions amounting to 4%–5% of their earnings. The average percentage of contributions out of total earnings was 7%. The main modes of contribution reported by the participants were through intermediaries such as non-profit organizations and foundations (46%), direct personal contributions to the beneficiary (29%), and contribution of time (37%); 25% of the participants reported that they made contributions through their business or through establishing a foundation. The average number of organizations that the participants contributed to was 22.

### Motives for Giving

Table 1 indicates that the participants' main motives for giving were a sense of responsibility for their surroundings, a sense of satisfaction from giving, a feeling that in difficult economic times people with means need to provide assistance, a sense of belonging to the community, a desire to promote certain issues, and the good feeling that derives from giving. In

**Table 1** Motives for giving

Statements	Ranking extent of identification (percentages)			Mean <sup>a</sup>	SD
	1–low	2–moderate	3–high		
1. I feel responsible for my surroundings.	3.80	5.06	89.87	2.87	0.44
2. I get satisfaction from giving.	3.80	5.06	87.34	2.87	0.44
3. It seems to me that in such problematic times, those who have the power and ability to initiate change need to make at least a minimal effort.	6.33	6.33	86.08	2.81	0.54
4. I feel that I belong to my environment, that I am part of the community I live in.	7.59	8.86	83.54	2.76	0.58
5. I want to promote certain issues, and this is the appropriate way of doing it.	5.06	13.92	79.75	2.76	0.54
6. I feel good when I give. It's fun.	6.33	15.19	74.68	2.71	0.58
7. I think we are responsible for one another.	8.86	20.25	69.62	2.62	0.65
8. I feel responsible for what takes place in my environment.	17.70	7.59	69.62	2.55	0.79
9. The concept of contributing to the community runs in our family; it's an ideology I grew up with.	22.70	5.06	72.15	2.49	0.85
10. I grew up with values of giving—if you “have more”, you have to give.	16.40	18.99	64.56	2.48	0.77
11. “Charity and deeds of loving-kindness are equal to the observance all the commandments in the Torah”.	34.18	17.72	48.10	2.14	0.90
12. Participation in fundraising events is part of my social standing.	58.20	7.59	32.91	1.74	0.93
13. When you move in certain social circles, you feel you have to contribute. That's part of having money.	64.56	11.39	22.78	1.58	0.85

<sup>a</sup> On a scale ranging from 1 to 5, where 1 is the lowest ranking, and 5 is the highest ranking

contrast, participation in fundraising events and moving in certain social circles ranked lower on the scale of motives for giving.

When the motives for giving were aggregated into indices, it was found that “promoting social issues” ranked highest (4.40), followed by “satisfaction and intrinsic motives” (4.33), and by “a sense of belonging to the community and commitment to the community” (4.15). “Values that encourage giving” and “belonging to a certain social circle or group” ranked lowest (3.80 and 3.12, respectively), on a scale ranging from 1 (*lowest*) to 5 (*highest*).

Participants were also asked to rank three main areas of interest for contributions, based on the following list: welfare, education, social change, health and prevention, culture, research, higher education, religion, coexistence, the Israel Defense Forces, the peace process, art, human and civil rights, victims of terror, road safety, and sports. In Table 2, the rankings are presented in three columns: (1) the percentage of participants who chose that particular area; (2) the average ranking of each area, on a scale ranging from 1 (*lowest*) to 3 (*highest*); and (3) the weighted order of priorities, calculated as the percentage of participants who chose that area (Column 1) combined with the average ranking of that area (Column 2).

Table 2 indicates that the preferred areas of interest for contributions were: welfare, education, social change, health and prevention, and culture. The areas with the lowest ranking were victims of terror, road safety, and sports. Their donations

were made mainly through private foundations that they established, or through their own private businesses.

As for the philanthropists' evaluations of the impact of contributions, 76% indicated that philanthropy generates change, whereas only 20% believed that it does not generate any change. Those who supported the argument that philanthropy generates change believed that it promotes leadership development and excellence as well as social mobility, and that it strengthens communities, promotes social goals, influences civil society organizations, places issues on the public agenda, and influences public policy making.

We also tried to learn more about the relationships between different background characteristics and the variables that were examined in the study. No significant relationships were found between the donor's gender and motives for giving, areas of interest for contributions, and scope of contributions. However, there was a relationship between religiosity and the motive of giving charity, as reflected in the statement “Charity and deeds of loving-kindness are equal to the observance of all the commandments in the Torah.” Thus, the religious philanthropists showed a greater tendency to contribute more than those who were not religious. It was also found that philanthropists with higher levels of education ranked higher education as their highest priority. Moreover, the number of years that the participants had engaged in philanthropic activity did not affect the size of their contributions or the percentage of contributions out of their total earnings. Finally, no significant associations were found between the size of contributions and the



**Table 2** Ranking of areas of interest for philanthropic contributions

Area	Percentage that chose that area (%) (1)	Average ranking <sup>a</sup> (2)	Ranking of 1 and 2 (3)
Welfare	62.02	1.90	1
Education	62.02	1.35	2
Social change	20.25	2.38	3
Health and prevention	21.51	1.94	4
Culture	15.1	2.33	5
Research	10.12	2.63	6
Higher education	13.92	1.82	7
Religion	11.39	1.89	8
Coexistence	8.86	2.29	9
IDF–Israel Defense Forces	6.32	3.00	10
Peace process	6.32	2.60	11
Art	5.06	2.50	12
Human and civil rights	6.32	1.80	13
Victims of terror	2.53	2.50	14
Road safety	2.53	1.50	15
Sports	1.25	3.00	16

<sup>a</sup>On a scale ranging from 1 to 3, where 1 is the lowest ranking, and 3 is the highest ranking

percentage of contributions out of total earnings. Similarly, no significant associations were found between the size of contributions and the number of organizations that the donor contributed to.

### The Attributes of Elite Philanthropists

The findings suggest that Israeli elite philanthropists have a relatively high level of academic education: 51% of the elite philanthropists participating in the survey had MA or Ph.D. degrees, and those with higher levels of education tended to be more interested in contributing to academic institutions. This finding is consistent with the results of studies conducted in other countries, which have revealed that people with higher education are more generous than those with lower levels of education (Havens et al. 2006; Mesch et al. 2006). However, the philanthropists' gender and age were not related to their willingness to contribute. The survey also revealed that the proportion of religious philanthropists was higher than the proportion of religious people in the overall Israeli population at large. This finding is consistent with the results of other studies which have revealed that religion affects philanthropic contributions in general and contributions to religious causes in particular (Katz and Haski-Leventhal 2008), and that religious people are more altruistic than non-religious people (Brown and Ferris 2007). It is important to bear in mind that despite the tendency to assume that the persons who were defined here as elite philanthropists represent the group of “new philanthropists”,

only 11% actually were new philanthropists, and the vast majority were veteran philanthropists.

The main motives of elite philanthropists were defined as “responsibility for their surroundings” and “feeling part of society and the community in which they live”, as well as internal motives for giving. For some of them, giving was based on personal values, and the status of belonging to a certain social group did not affect their motives for giving. They also believed that they have an impact on the areas that they contribute to—primarily education, welfare, culture, health and prevention, and social change. The new elite philanthropists felt an obligation to give back to society in appreciation for being able to accumulate resources and capital. Moreover, the findings indicate that Israel is still in the process of forming and shaping its identity and image. At the same time, the Israeli economy has been growing rapidly. In that context, elite philanthropy is predominantly motivated by a commitment to building and strengthening society—a commitment which reflects their belief in the principles of Zionism and all that Zionism symbolizes. The relationship between religious background and giving to religious causes is not surprising, and is consistent with various studies that have been conducted throughout the world (Bekkers and De Graaf 2006). The findings indicate that people with a religious education and background view themselves as being committed above all to religious causes, and to strengthening the communities in which they live and the institutions in which they operate.

The research findings also indicate that the average size of contributions made by individual philanthropists was less than NIS 3 million per year (about \$750,000)—a sum that is

lower than the amount for entitlement to full tax benefits under Article 46 of the tax law. It is also important to note that the scope of contributions revealed in this study does not correspond with the rise in the number of organizations that Israeli philanthropists contribute to. One of the explanations for this finding derives from the assumption that philanthropists allocate a certain sum for contributions out of their earnings, which is not affected by the increasing number of organizations that seek contributions.

In contrast, research evidence has revealed an association between income level and the scope of contributions. Some researchers have found that people with higher income are more willing to make philanthropic contributions (O’Herlihy et al. 2002; Schervish 2005). At the same time, other researchers have revealed that people with lower income also express a high level of willingness to make contributions. For example, studies conducted in the United States have revealed that the wealthiest and poorest people contributed about 3% of their income to charitable causes (McClelland and Brooks 2004).

The average percentage of contributions out of the Israeli philanthropists’ total earnings (7%) was not lower than the percentage of contributions made by philanthropists in other Western countries (3.3% in the United States, and 0.6% in Britain). However this finding needs to be qualified on several grounds. First, our sample was relatively small and non-random. Second, many of the philanthropists in the present research sample refrained from reporting on their income and profits. This in itself reflects the lack of transparency in conveying information that is essential for making estimates of philanthropic investments. Third, existing data on the percentage of contributions out of total earnings in other countries relate to the population at large, whereas the data in the present survey relate only to relatively large donors.

Another interesting finding on the scope of philanthropic contributions in Israel relates to the number of organizations that Israeli philanthropists contribute to—22 organizations on the average (range 5 to 120 organizations), and that the preferred areas were welfare, education, social change, and health and prevention. Evidently, the relatively large number of organizations indicates that the distribution of contributions reflects the distribution of risk involved. When philanthropists limit their investments to a small number of organizations, any failure in achieving the organization’s goals can weaken their motivation to give. In contrast, a broad distribution of contributions over a relatively large number of organizations can be construed as a lack of strategic focus. This finding is not consistent with the results of other studies, which have revealed that 89% of all private donors in the United States limit their contributions to three main areas (Tobin and Weinberg 2007).

As for new philanthropy in Israel, the findings indicate that only 11% of the participants were in the category of “new philanthropists” who had engaged in philanthropic

activity for only 2–5 years, whereas the vast majority of participants had engaged in philanthropy for a much longer period. However, the findings and the open interviews held with the “old” philanthropists indicate that some of them had adopted businesslike, task-oriented characteristics and behavior that typify new philanthropy.

An outstanding characteristic of new philanthropists is reflected in the terminology they use, in the goals they seek to achieve, and in their rationale for choosing to contribute to certain areas, as well as in their perception of themselves as new philanthropists and as social entrepreneurs. The mixture of “old” philanthropy and “new”, business-oriented philanthropy is indicative of the new patterns that are being adopted by Israeli elite philanthropists. As such, Israeli philanthropy is still struggling to establish a distinctive identity, and has yet to become established, both in terms of its expectations of itself and in terms of its expectations of the institutions and organizations to which they contribute (Schmid 2011).

It should be noted that the decisions of elite philanthropists are based more on intuition, past experience with giving, a family tradition of giving, and interpersonal relations with the recipient than on rational, systematic considerations. In light of the results of previous studies, it is known that personal relationships and “chemistry” between the donor and the recipient of the donation play a key role in decisions about giving, above and beyond other factors (Noonan and Rosqueta 2008; O’Herlihy et al. 2002).

In sum, elite philanthropy in Israel encompasses “old” and “new” philanthropists. In contrast to other philanthropists, these elite philanthropists have a relatively high level of education, and are characterized by a family tradition of giving. Their main motives for giving are a sense of obligation to give back to society in appreciation for being able to attain their status and wealth. Elite philanthropists in Israel also view themselves as playing an important role in the national effort to create a new society. Toward that end, they contribute substantial sums of money, which distinguish them from other philanthropists, who contribute to programs and initiatives that are limited in scope and social impact. The phenomenon of elite philanthropy has various implications for other philanthropists, and for their relationships with the governmental and nonprofit organizations that they contribute to. Elite philanthropy is a spearhead and role model for other philanthropists to increase their contributions and influence social causes in order to improve the well-being of populations at risk and underprivileged citizens. Regarding relationships with the government, because elite philanthropists control large amounts of capital and assets, they are well connected with policy makers at the national and local levels, and can influence them. The concentration of a relatively large share of capital in the hands of an elite group can also cause policy makers and third sector organizations to become dependent on the decisions and actions of those who possess the power.

Nonetheless, the survey findings suggest that Israeli elite philanthropists do not view themselves as a substitute for official state institutions, and they often voice criticism about the functioning of public and governmental agencies. The relatively generous contributions of Israeli philanthropists are no substitute for government budgets—nor are they intended as such. The statements of the participants in this survey indicate that Israeli elite philanthropists seek to supplement government activity, to contribute to society in areas where the government has had difficulty responding to the needs of the population, and to put processes in motion where the bureaucratic government encounters red tape.

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