WORKING IN A RELATIONAL WAY
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"Connected people tend to have an effect on one another."
> Charles Kedushin in *Understanding Social Networks*

"Increased cooperation for greater accumulation effects requires revising traditional self-centered attitudes about impact and how to get it."
> Theodore Lobman and Ray Bacchetti, "Increasing Foundation Impact by Building Educational Capital" in *Reconnecting Education & Foundations* (Ray Bacchetti and Thomas Ehrlich, Editors)

"I can imagine a system embracing ongoing, positive partnerships, among funders, among nonprofits and between them. They would work together under open, *mutually* agreed-upon and adaptable rules. The rules would be geared toward producing successful outcomes by sharing useful information, by learning together, by treating each other respectfully, by encouraging and using feedback, and by leveraging resources from all the sectors."
> Ed Skloot in *Beyond the Money*

Readers of this set of papers would reasonably expect that I possess greater working knowledge of the Jim Joseph Foundation's full range of philanthropic activities than any of the seven distinguished *madrichim.* After all, I am a privileged insider, having served as the Foundation's founding Executive Director since its inception in 2006.

Similarly, you might think--again, understandably so--that this unique position makes it easy for me to trot out a big idea or two for future Jim Joseph Foundation funding. While I do have several major grant opportunities in mind, I am sure that the *madrichim* will proffer an impressive list of intriguing philanthropic possibilities for the Foundation to contemplate. In fact, so certain am I that *madrichim* big ideas will be sufficiently robust and formidable that I want to focus not on the what but the how. My belief is that the Jim Joseph Foundation's full potential as a major funder of Jewish education can best be realized in fully developing a **dynamic, relational approach to grantmaking.**

Let me begin with the obvious observation that the world is changing at mind bending speed. The confluence of the internet, social media, and mobile technologies fuel forms of globalization that are historically unprecedented. People are connected to, and with, one another in ways never before possible. Information is transmitted and received faster and in more ways than ever before

Against this backdrop, the state of the Jewish community is in flux. Depending upon your perspective, the Jewish experience today lies somewhere between being members of a tribe plagued in modern times by denominational factionalism whose extinction as a people is a demographic inevitability, to being a flourishing, diverse peoplehood whose creative renewal of customs and traditions and unabated chain of extraordinary achievements in all fields of human endeavor presage a vibrant Jewish future.

What is not at issue is Jewish education, support of which is the raison d'etre of the Jim Joseph Foundation. The Jewish people value education and cherish life-long learning.

The interplay of accelerating global interdependencies, decentralizing of authority, democratizing of knowledge, and peer networking lead me to propose my big idea for the Jim Joseph Foundation to ponder. It is this: the Foundation and its grantees as well as its technical assistance providers and funding partners must come together in much more highly interactive, problem solving, knowledge producing ways.

We have worked diligently at the Jim Joseph Foundation to develop an approach to philanthropy that places a premium on shared responsibility for the success of any major grant awarded. This responsibility, in the best case scenario, is owned by the grantee *and* the funder *and,* in cases where they participate, independent experts (e.g., evaluators, strategic planning consultants, business planners). It can happen only when learning is at the core of the enterprise.

This evolving approach to grantmaking offers more substantive opportunities for engagement and learning than the more commonly practiced transactional philanthropy. The latter I have long believed can impede effectiveness: it tends to perpetuate a counterproductive funder/grantee power imbalance, mitigates against long term investment in worthy projects, and deprives the field of crucial lessons learned.

I recognize the challenge here is to not set up traditional grantmaking as a straw man. The conventional grantmaking cycle of letters of inquiry, proposal submission, review of proposals by professional staff, Board review, transmission of grant award letters, and subsequent grant payments on a fixed schedule has produced some remarkable results.

It is worth noting, however, that this grantmaking is typically conducted as a series of formal, written transactions which characteristically do not engender deep levels of funder-grantee interdependence. Nor does it often provide the frequency of inter-personal communication that engenders trust. In my experience, real trust building among stakeholders produces improved pace in project implementation and enhanced performance of all involved. There is not much energy directed to relationship building. Funders and grantees do not devote a great deal of time to learning together. Project evaluators are rarely involved in discussion with the grantee and funder to analyze progress being made toward desired project outcomes. The cost of *non-learning* is unknown to all.

In this model, the consequence for grantees which perform poorly is loss of funding and the capital which helps them to conduct their business. For the funder, the outcome of a grant made to an under performing grantee typically has no adverse effect whatsoever.

Former Surdna Foundation CEO Ed Skloot describes conventional philanthropy as "discrete transactions made in a linear fashion...mechanistic, transactional, and isolating." Skloot suggests new ways for foundations to work, acting as "information resources brokers, learners and listeners, and promoters of success." And no less a public figure than Howard Warren Buffet asks "how can we take an active role catalyzing...foundations and nonprofits to come together to...leverage up their resources so they can accomplish more?"

The Jim Joseph Foundation is continuously experimenting with meaningful ways to engage not only with grantees but with evaluators, technical assistance experts, and other foundations. We are pursuing myriad configurations of stakeholders in problem solving conversations both to hone our critical thinking and to expand the network of resources we

bring to our work as well as to that of Foundation grantees. The goal, in this regard, is ultimately to improve the effectiveness of the Foundation's philanthropy.

I do not want this big idea to feel "soft." The role I envision for the Jim Joseph Foundation is substantial: to be one of several main actors in real theater consisting of a cast of characters who devote themselves to creating strong, trusting relationships around various major Jewish education initiatives. Funders, grantees, evaluators and consultants alike align around common, consensually agreed upon goals--both for projects themselves and for field-related knowledge creation and dissemination. Grantees' transparent sharing of progress made and challenges encountered in ongoing conversations with foundation and evaluation personnel leads to real time learning. Foundations in turn become "conduits of the nonprofits' knowledge" to the field of Jewish education in what becomes "effectively, a two-way distribution system" (Frank Ellsworth and J. Lumarda in From Grantmaker to Leader).

To demonstrate one example of relational philanthropy, let me conclude with an example of a future activity that could quite conceivably be undertaken by the Jim Joseph Foundation.

The Foundation currently funds several grantees whose beneficiaries are young and so-called "emerging" adults. We have a number of evaluation studies that have yielded fascinating findings on how this population lives--and learns--Jewishly. We are at a point where a "cluster" evaluation of a number of grants seems to be in order.

For such an evaluation, we would bring together representatives of: each of the grantees which has received Jim Joseph Foundation grant support; the projects' evaluators; and other foundations which have abiding interest in the characteristics, beliefs, and Jewish practices. We would likely add to the mix a scholar(s) whose expertise in human and young adult identity development would enrich the conversation. Together, we would explore topics of shared interest, with an expressed intent to examine and analyze some aspect of the young adult Jewish experience common across all the grantees' work.

In this scenario, trust among all the participants is paramount. Everyone involved contributes to an effort designed to generate an area of study that all agree is important. Business gets done in conversation. Relations develop. The philanthropic practice is one of active listening, networking, and sharing information in reciprocal exchanges of knowledge (see Ed Skloot's Beyond the Money). Participants interact with one another in a common pursuit to build skills and, ultimately, to produce a study for dissemination that will enhance the work of all those for whom the study's findings are relevant.

For whatever major grants the Jim Joseph Foundation awards in the future, I believe that this *community structure of knowledge production*, enabling the Foundation and all its stakeholders to interact with one another in *relational contexts* (see Network Search: A New Way of Seeing the Education Knowledge Domain by Daniel McFarland and Eric Klopfer), is the Foundation's most direct route to enhanced philanthropic effectiveness and positive impact on the world of Jewish education.