

FUNDERS & **POWER**

Principles for Honorable Conduct in Philanthropy

DISCUSSION GUIDE

This guide is a companion to **Funders & Power: Principles for Honorable Conduct in Philanthropy**, available at jfunders.org/funders-and-power. Use it to convene honest and informal conversations with your colleagues, family members, funder peers, and others. Together you can explore how these principles for good conduct in philanthropy interact with your own philanthropic lives, your experiences in the Jewish community, and your thoughts and feelings.

Don't worry about covering all the questions. Focus on the ones that resonate most strongly in your group. It will likely be helpful to designate one person as the facilitator of your conversation—either a professional brought in for the conversation or one of the participants who is well-suited to this role. The facilitator can ensure that everyone's voice is heard and valued, and that the conversation stays topical and productive.

1: TAKE COVENANTAL RESPONSIBILITY

- What does the concept of brit / covenant mean to you as a Jew? As a philanthropist?
- In other aspects of your life, what covenants are you part of, and how do those relationships inform your view of what covenant means?
- What personal qualities does it take to create or maintain a covenant?
- When have you felt most trusting of others in a philanthropic context? (Fellow funders, grantees, or others in the community.) What actions, words, signals, or other context helped you feel that trust?
- What texts — Jewish or other, religious or secular — inspire you as a Jewish philanthropist in covenant with a broader community?

2: TREAT GRANTEES AS PARTNERS

- What do you think are a grant maker's fundamental rights and responsibilities in relation to grantees?

- What do you think are a grantee’s fundamental rights and responsibilities in relation to funders?
- When, if ever, have you felt most like an equal partner in a grant maker-grantee relationship?
- What conditions, actions, words, or practices enabled that feeling?
- How did that relationship impact the work you did together with that grantee?
- How do the partnerships in your philanthropy compare with other partnerships in your life?
- How does the concept of partnership with grantees relate to the concept of covenant explored in #1?
- How do issues of partnership with grantees affect questions about how and what you fund?
- How much tension—if any—exists between rigorous evaluation and responsible stewardship on one hand and treating grantees as equal partners on the other? How can these ideals be best pursued simultaneously?
- If you feel comfortable, share a mistake you’ve made in a grantee relationship.

3: CONSIDER THE ENTIRE COMMUNITY

- By what processes, if any, do you consider populations other than your target population in your planning? Who are the other populations, and why?
- How, if at all, do you consider opportunity costs (the roads not taken) and negative unintended consequences in your grant making?
- What experiences have you had with positive unintended consequences?
- In a world far too complex to understand completely ahead of time, how can we be best prepared to make the best of unforeseen outcomes, good and bad?

4: CONSIDER AND HONOR DIVERSE VIEWPOINTS

- What environments, contexts, or organizational cultures make it safe and likely to hear and voice dissent? How do we create opportunities to disagree productively?
- What emotional and mental skills or practices, if any, do you use to ensure you are able to hear divergent viewpoints?
- What leaders and organizations do you know who model this principle?

- What lessons from beyond the world of philanthropy can inform funders in escaping the “echo chamber”?
- Have you ever felt like the only one in the room who disagreed with some consensus? How did you engage with that?

5: BE ETHICALLY CONSISTENT

- What are your animating ethical principles? Do you have them listed? Did you arrive at them deliberately?
- How often do you “audit” your philanthropic decisions and practices for consistency with your values?

6: BUILD REFLECTION INTO THE PROCESS

- Who are the mentors, subordinates, colleagues, family members, or others whom you trust to give you honest and useful criticism? How often do you speak with them?
- What are your tools and criteria for self-assessment as a philanthropist? How do you know you’re succeeding? What kind of outcomes would it take for you to fire yourself?
- Who are the people you admire who are best at taking criticism constructively? What traits or practices do you notice about this ability that they display?
- Is it possible to create contexts in which subordinates or grantees can give honest criticism to funders? If so, what defines those contexts?

7: FUND POSITIVE CHANGE, NOT HOSTILITY

- Think of a time you had a respectful conversation with someone whom you deeply disagree with about a core issue. What made that conversation work? What made you feel respected by the other person?
- Recognizing that there are issues that deeply divide our families and communities, what are some paths we can take to engage each other in positive ways?