

Listening and Learning

Michael and Jane

We are in Aspen in mid-summer at a large, beautiful, log cabin style home with a pristine view of the Rocky Mountains. In the living room are about 20 people, the family whose vacation home it is and who have recently formed a large foundation, a few relatives, their attorney, a recently hired staff person, and six prominent experts in three issue areas. Some are nationally known and some are local to Southern California where the family lives. The issues under consideration are child abuse, education and learning disabilities. Prior to this weekend discussion, the family had read a research paper prepared to provide background and context on the issues.

It is a stimulating day, and Michael & Jane, who funded this new foundation, and their three sons, are deeply engaged. The discussion moves differently in each issue area. The more they learn about child abuse, the more tough it seemed to do anything about, with efforts being driven by public policy government programs rather than private philanthropic intervention. With K-12 public education, it becomes clear that there are a great many existing foundation players in their city, and the best idea might be to collaborate with others. There is one existing program in particular, sponsored by a major national foundation, that is a prospect for support. The briefing on learning disabilities turns out to be the most interesting and surfaces a major gap in the training of professionals, and a potential opportunity for the foundation to play a leadership role.

This is a lot of information to absorb, but the next day, the family still buzzing about what they have learned, makes some important decisions.

A year later, with support from this foundation, a major new program is introduced to the community that will train teachers, youth workers and others who work with young people to better recognize and treat children with learning disabilities.

Paul and Phyllis

Paul & Phyllis have a large family foundation. They are meeting with Sister Sue who runs a highly regarded shelter for homeless families. Their idea is to help these families transition from the shelter into apartments— providing money for furniture, and up-front rental costs. Sister Sue has asked three women living at the shelter to be part of the meeting. During the discussion, it becomes clear that it will take more than getting these women into an apartment to put them back on track. What they need most are jobs that can support their families. As one of the women said, "It would almost be worse to move into a new apartment and then get evicted and end up back on the street six months later because I couldn't afford the rent."

At the end of the evening, Paul turned to Phyllis and said, "These families are not so different than ours. We just always had money and other resources to throw at our problems. Enough bad luck and this could have been us." It was a major revelation for Paul and Phyllis, and one that led the foundation to focus on jobs that would pay enough to provide real economic independence.

Six months later, after extensive research into what jobs are available to very poor women without much formal education, Sister Sue and her colleagues begin a program for homeless women that will put them into the day care business. If it works, the women will make a livable wage and at the same time solve a need for day care services in the community. The foundation agrees to capitalize these start-up micro-businesses, including what is needed to prepare an apartment or house so that it meets the city's code requirements.

Putnam Executives Foundation

I am with a group of senior executives of a major investment company. They are a Committee of 8 representing 35 of their colleagues who have collectively put \$2 million of their annual bonus in a pot to give away. This "giving circle" is just getting going and the ideas on the table are diverse, but all share the intent to improve the lives of poor families and kids. One member proposes that they "adopt" an elementary school class and promise scholarships to those who ultimately graduate from high school. While this is a good idea it has been done before, and it doesn't get much backing.

Someone makes the comment that she really doesn't think the committee members, herself included, all of whom make a lot of money, have a clue how very poor people really feel. There is no argument about that in the room, and the suggestion is made to try a role-play, to put themselves in the position of those they want to help. Perhaps that would give them a better sense of how the \$2 million should be spent.

Committee members assume the role of characters in three very different scenarios. The first scenario involves a welfare mother with two young children. The second concerns a working mother who makes a modest living but whose youngest child has severe asthma. The third concerns a couple living on minimum wage with three teenage children who live in a gang-infested part of town. It turns out to be a very engaging exercise as it becomes clear that any one actually in those precarious, sometimes desperate life situations would have very strong views about how to use \$2 million. The Committee members have what could be called an "ah ha moment" and realize they have been thinking too narrowly, and not holistically enough. From this experience, they develop criteria for a request for proposal that includes the requirement that the programs to be funded involve the recipients in the planning process. The Foundation ultimately funds four outstanding organizations that have excellent track records in helping poor families deal with their lives. Three years later, the members of the Committee still talk about the role-play.

There are many ways to learn, but the closer one gets to real situations, real people, and real life, the more relevant and useful it is.