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**Tzedakah in Your Everyday Life
Considering The Hekdesch Nominees
Tzedakah Learning Pod - Year 2, Session 5: April/May 2012**

OPENING – PLEASE READ ALOUD
RECOMMENDED TIME – 10 MINUTES

In this Tzedakah Learning Pod session, we want to give you a chance to practice your new skills as a more tactical and strategic tzedakah'ist.

In this session, we will focus on how our individual values might influence our votes on Hekdesch's 2011-12 Semi-Finalists.

This session is divided into 6 sections, and at the start of each section, there is a recommended amount of time. If we hold to these recommendations, the session will take 1.5 hours in all. Do we want to assign one person to help us keep the time?

Gather any documents you have handy that will help you reflect on your organizational priorities: your personal mission statement, analysis of current giving, list of organizations you gave to last year, etc.

If you're rusty on how HEKDESH chooses its Grantees, here's a brief primer: DFI community members nominate organizations. Members of the Grantmaking Committee research the organizations further and narrow the list to a smaller group of Semi-Finalists. HEKDESH members vote the Semi-Finalists down to 3 Finalists (this is what you are preparing to do during this session!) by each distributing 6 votes among the Semi-Finalists as they wish (i.e. you can give all 6 votes to one organization, or spread them out). A Semi-Finalist call will take place on May 6 to discuss the organizations – the Grantmaking Committee would welcome your participation in the call! Each member then spends his/her "chips" (each representing \$18) among the 3 Finalists as s/he sees fit. This will happen May 22-June 3, 2012.

Let's get started!

SECTION 1 – REVIEWING SEMI-FINALISTS WITH WHITE HATS: WHAT DO WE KNOW?
RECOMMENDED TIME – 25 MINUTES

Each pod member has read the nomination materials for a few Semi-Finalists as homework so that as a collective, your group is familiar with every Semi-Finalist organization and each group member serves as an "expert" of sorts. Have your comments ready to share with the group as you go through the list together.

Use the attached blank table to note your personal rankings during this conversation. Feel free to add additional criteria that may be important to you if they are not already on the table.

In order to share what we've learned about the various organizations, while deepening our own thinking about our existing priorities, we will look at each organization through a variety of lenses together. The lenses will be called "hats," in reference to Edward de Bono's theory of Six Thinking



Hats.¹ We will attempt to separate our thinking into a few distinct categories (don't worry, not all six!). Each category is identified with its own colored metaphorical "thinking hat." By mentally wearing and switching "hats," we can focus or redirect thoughts.



We'll begin by putting on our WHITE hats, which represent objective thinking. Now is the time for us to share facts, data, and information about the organizations before us. Let's avoid judgment, feeling, and emotion as we are able. Help other pod members do this if they get stuck or slip into another "hat."

Pod member should now go around and summarize their assigned organizations from this perspective. Keep an eye on the clock so that each organization gets equal time. There are 7 organizations, so if you spend 3 minutes on each, you should be right on time. As you listen to pod members report out, take notes on your ranking table for related questions like "How do the **size** and **budget** of this organization relate to my priorities?" and "Am I satisfied by the group's **financial health and transparency**?"

SECTION 2 – TELL ME HOW YOU FEEL: REVIEWING SEMI-FINALISTS WITH "RED HATS"
RECOMMENDED TIME – 15 MINUTES

Now you will change hats, entering the mode of thinking associated with feelings, hunches, and intuition. Each member will revisit his/her assigned organizations, this time from the emotional perspective. Unlike in Section 1, now everyone is invite to comment on every organization as they wish – no one is the "expert" at this part! Spend about 2 minutes per organization to stay within time guidelines. As you take notes on your pod session ranking sheet, you might want to focus on some of the social/emotional questions, including "Do I have a **personal connection** to this organization or its work?" and "Is this **where** I want to make a change in the world (Jewish cause vs. universal cause; local, national, international, or in Israel)?"

¹ De Bono, born in Malta in the 1930s, is a physician, author and consultant who studies creative thinking, innovation, the direct teaching of thinking as a skill. He invented the term "lateral thinking." Read more at http://www.valuebasedmanagement.net/methods_bono_six_thinking_hats.html

SECTION 3 – DO YOU HAVE ANY CONCERNS? WEARING OUR “BLACK HATS”
RECOMMENDED TIME – 5 MINUTES

**** Please note that “black hat” is de Bono’s terminology and is not meant to refer to “black hat Jews” in any way, shape or form! Awkward, we know...**

We are Jews. We think. We feel. We worry! What will others think of HEKDESH or the DFI or young Jewish leaders in general if we fund these organizations?

It’s time to put on our “black hats” – hats that refer to the mode of thinking associated with caution, judgment, and looking logically at the negative aspects of a problem - often described as the ‘devil’s advocate’ mode of thinking.

Take 5 minutes as a group to discuss any concerns you have about these organizations, individually or as a collective and specifically, how our decisions, as a collective, have the potential to influence others. Refer to your ranking sheet questions such as “How do I feel about this organization **being cutting-edge or having an established track record?**” and “How does this organization fit in with my overall **giving portfolio?**”

SECTION 4 – WEARING OUR “TRUEST SELVES” HATS
RECOMMENDED TIME – 10 MINUTES

Perhaps the hat that matters the most for this exercise is one that de Bono hasn’t named at all – the mode of thinking where you reflect on yourself as a tzedakah’ist and think about how to further your existing mission statement and current giving profile via this process. Look over your personal mission statement, list of organizational priorities, or anything else you have in your Tzedakah Journal or elsewhere to help you recall your pre-established giving priorities.

If you haven’t marked up your ranking table, now’s the time to pull it out and start making some choices. What organization(s) would you vote for if you had to vote today? Circle them now so you don’t forget your initial thinking! You’ll have 6 votes to distribute, so you might think about how you want to strategically use your votes – all for one organization, more or less evenly distributed, etc.

If you are ready, share the organizations that you intend to vote for with your group. If you aren’t ready, share a question or a tension that you need to resolve before you can vote.

SECTION 5 – TRYING ON ANOTHER PERSPECTIVE
RECOMMENDED TIME – 15 MINUTES

As a bit more of an intellectual exercise, and to learn more about the Grantmaking Committee’s (GC) process, now you’ll look over the document that the GC used to narrow the nominated organizations down to the semi-finalists. If time permits, you may discuss:

- What’s different about the GC priorities from your own? What’s the same?
- Did anything surprise you?
- Was there anything that you’d like to adopt as part of your own decision-making process?
- Is there anything missing that you’d like to bring to the attention of the GC?



SECTION 6 – CLOSING/HOMEWORK/SCHEDULING
RECOMMENDED TIME – 10 MINUTES

Please read out loud:

A. Closing

This brings us to the end of our fifth Tzedakah Learning Pod session! We've spent some time doing serious critical analysis as a group, supporting each other and pushing each other. Share one way you can use/apply some of the things you've learned with your pod in a manner outside the learning pod.

B. Homework (recommended time: 15-20 minutes)

1. In your tzedakah journal: What questions do you need to have answered in order to vote and does the pod want to work together to answer these questions?
2. Reflect back on the previous sessions this year, including Money and Me; Consumers, Consuming and Consumption; The Heart; Planned and Unplanned Giving; and Considering the Hekdesh Nominees. What is one text, idea, theme or question that is sticking with you from any of these sessions?

C. Next month

Let's make sure we have our date scheduled for next month. (Please meet after May 15.) And remember – we can be in touch with each other with tzedakah ideas or reflections during the month, as well as sharing ideas with the broader Pod group through TLP2010-11@googlegroups.com

See you next month!

