

PRACTICE NOTE

A case study in leveraging strategic partnerships through trust-based philanthropy

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Abstract

This practice note highlights a case study of leveraging strategic partnerships through trust-based philanthropy, a set of practices rooted in values, relationship building, mutual learning, and equity. It describes the motivations, planning, and execution of a symposium organized by, and held for, a Foundation and four of its grantees. The symposium led to the development of sustained pathways between and among the partners, resulting in productive collaborations and shared projects. This case study is shared to illustrate the argument that it is the responsibility of funders, and certainly in their self-interest, to eliminate competition between organizations to whom they provide financial resources and support. By facilitating trust and collaboration, funders are uniquely positioned to foster collective, higher-impact work.

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Practitioner Points

What is currently known about the subject matter

- Trust-based philanthropy is rooted in values and relationship building, mutual learning, and system equity.
- It has the power to loosen restrictions on nonprofit partners and encourages an understanding of funders' role being as a partner working in service of nonprofits and communities.
- At institutional levels, particularly in the United States, many nonprofit organizations often have a preference to work in silos due to propriety concerns and their means of attracting funders to their work.

What this paper adds

- This paper presents a case study of like-minded institutions, convened by one funder using trust-based philanthropy, connecting to serve a similar larger purpose and achieve more together.
- The convened partners leveraged these strategic partnerships into collaborations and a relationship that will continue, with or without the funder's involvement.

Implications for practitioners

- It is the responsibility of funders, and certainly, in their self-interest, to eliminate competition between organizations to whom they provide financial resources and support.
- By facilitating trust and collaboration, funders are uniquely positioned to foster collective, higher-impact work.

1 | INTRODUCTION

Effective and sustainable partnerships require significant strategic alignment among cross-institutional collaborators and an active commitment from all parties to work to mitigate the inherent hesitancy of independent organizations to connect and share resources. Trust-based philanthropy¹ is critical to achieving this as it sets the tone for mutual connection and collaboration. Trust-based philanthropy is rooted in values and relationship building, mutual learning, and system equity with a vision of advancing a healthier and more impactful nonprofit. It has the power to loosen restrictions on nonprofit partners and encourages an understanding of funders' role being as a partner working in service of nonprofits and communities.

Employing trust-based philanthropy—and using this as the basis to form active, equitable collaborations among funding recipients—can be challenging, in part due to the top-down power dynamics that are often found within organizations, including funding organizations.² It takes a leap of faith to step away from the driver's seat and enter into a reciprocal relationship where all parties are learning how to do more and do better. Sharing power in this way may also be challenging for funders because of a fear that their mission might be lost in someone else's mission. This is why mission alignment is so important; it facilitates true partnership where parties move forward together.³

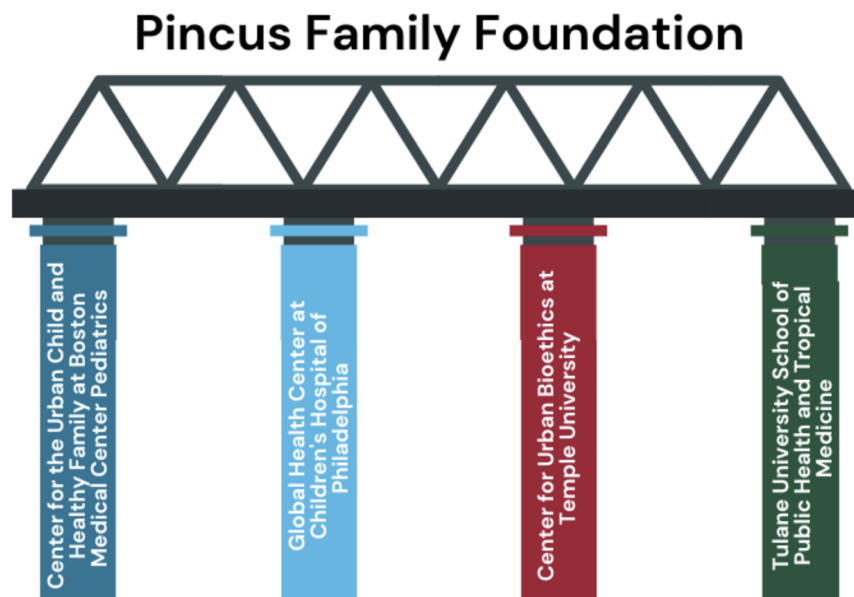
The Pincus Family Foundation⁴ (the Foundation) focuses on improving the lives of children by supporting nonprofit organizations and programs that promote equitable access to healthy lifestyles, education, the arts, and play and recreation, locally, nationally, and

globally. The Foundation is not only a funding source but also a thought-partner for the organizations that it supports. This orientation stems from the Foundation's observations that many nonprofit organizations, especially at institutional levels in the United States, often have a preference to work in silos. This is often tied to propriety concerns and their means of attracting funders to their work.

In this report we describe how the Foundation's philanthropic design uniquely promoted the development of pathways among four grantees under their “Health and Wellness Pillar”: The Global Health Center at Children's Hospital of Philadelphia (CHOP),⁵ the Center for Urban Bioethics at Temple University's Lewis Katz School of Medicine⁶ (Temple), the Center for the Urban Child and Healthy Family at Boston Medical Center Pediatrics⁷ (BMC), and the Tulane University School of Public Health⁸ (Tulane) (Figure 1). As the core to these four pillars, the Foundation has awarded over 17 million dollars to these grantees. The first partnership began in 2008, with the addition of the three new partners in 2015, 2017, and 2018. Each partner was first funded for their individual program; convening them for the funder's special project, the case study described here, was specifically to bring them together.

In 2019 these newly integrated “Pillar Partners” were charged with creating the Foundation's first symposium. Held in the summer of 2020, the symposium, entitled *Toward a Better Future: Promoting Child Well-Being and Health Equity through Strategic Partnership*, illustrates the promise, method, and results of leveraging strategic partnerships. The Pillar Partners spent significant time creating the symposium and the result demonstrates a model of how multiple

FIGURE 1 The Pincus Family Foundation and the four Pillar Partners.



institutions, funders, and other critical partners can be synergistic in their efforts, even if programs differ in specific ideology and design. The symposium amplified the work of each of the Pillar Partners and intentionally fostered deeper connections among them. Connecting like-minded institutions serving a similar purpose fostered a unique collaboration. By eliminating the competition often facing institutions and organizations receiving financial support from the same funding agency, collective work became the focus.

Participants left the symposium fueled with motivation and empowered with novel strategies for building synergy across programs, strengthening collaborations, sharing best practices, and forging new partnerships. Three years later, these connections continue and are reflected in this article as it was collaboratively written by all partners.

2 | THE SYMPOSIUM: MOTIVATIONS, PLANNING, AND EXECUTION

The idea for the symposium was born from the Foundation's intent to amplify its grantees' work and establish connections directly between the institutions that it strongly believes in and supports. By connecting like-minded institutions serving a similar larger purpose, a unique and collaborative format can be amplified to show how multiple institutions, funders, and other crucial partners can achieve more together. The Foundation explicitly acknowledged the partners as the thought leaders to develop the project, while taking on for themselves the role of learner, logistics, and facilitation.

The first 4 months of the 12-month planning period were used for intensive forming and storming.⁹ With liaisons appointed to a working committee and bimonthly meetings scheduled, the remaining 8-month norming period allowed institutional partners to collectively create a clear vision and purpose for the upcoming day-long event. Symposium goals were mapped out to inform the sessions that would

be run by each partner. Overall goals for the day included the following:

1. *Learn from each other*—by sharing unique work and lessons that also support the Foundation's mission and vision and consider where the gaps are and how to fill them.
2. *Situate ourselves as experts in the larger question of supporting norm change through and in research, education, policy, clinical care, advocacy, and more*—with the ultimate charge of fostering the development of healthy and safe children.
3. *Establish a foundation for measuring and reporting the state of children's health*—in a way that allows those doing the work to demonstrate change.
4. *Build a synergistic network among the partners.*

The symposium itself moved to an online format in response to COVID-19, a move that was initially disappointing but proved to be advantageous as attendance was more robust due to the lack of a need to travel. Thus, the collective that was an intended result of the day was made larger by the move to virtual.

Opening remarks and orientation provided by Pincus Family Foundation Trustee and key Pillar Partner support Andrew Epstein, MD, set an important tone for the day. The group was challenged to consider a world where it is possible to invent a shared destiny faster than the natural tendency to diverge into one's own self-interest. Dr. Epstein's charge to attendees focused on considering how enlightened self-interest, inside a commitment to a shared destiny, can create successful and mutually beneficial partnerships moving forward. This is a challenge echoed in this case study.

The sessions that followed covered topics designed to support the collective mission of trust-building and force—multiplication toward the goal of creating structures, practitioners, and systems better able to achieve greater health for children. The day ended with a

discussion of the future and strategies for successful interdependent performing. It is to this performing period that we now turn.

3 | COLLABORATION

The Pillar Partners now have over 3 years of sustained and strengthened relationships and all truly consider themselves members of a community of collaborators. The group continues to hold recurring quarterly meetings, each of which results in new connections and renewed excitement about the collective. Representatives from different partner institutions have also met in smaller, targeted groups to draw on each other's experience and expertise and work jointly on various projects that would otherwise not have occurred. There is also a level of trust and awareness now that as each partner seeks new opportunities there may be areas in which the partners together may be greater than the sum of the parts. Collectively there is excitement due to the recognition that this is only the beginning, and there will be more collaborations to come.

Examples of shared projects include:

1. BMC and CHOP are part of a learning action network (LAN) that is reimagining pediatric primary care to create a pediatric practice of the future (POF) designed to meet the needs of marginalized families across the country. The LAN is currently developing a feasibility and implementation guide for the POF so it can be adapted and implemented at scale.
2. Tulane and Temple both have programs on violence prevention and intervention and representatives from both institutions share best practices, mentor trainees at each institution, and are planning a two-city comparative study.
3. Each year, CHOP convenes a Global Child Health conference bringing colleagues from around the world together to advance child health in low- and middle-income countries (LMICs). Members of Temple have joined the conference planning committee, co-led sessions, and enriched the scope of the conference to now include under-resourced communities in all settings, including the United States and LMICs. Additionally, both BMC and Tulane faculty have given invited talks at the conference.

The Pillar Partners are currently in discussions about facilitating pathways and creating a network of colleagues with a common focus on child health equity, whether it be in New Orleans, Boston, Philadelphia, or in CHOP's global health partner sites in Botswana or the Dominican Republic. The Partners are hopeful that a Tulane Master's of Public Health (MPH) student might in time become a resident at BMC, Temple or CHOP; and that a BMC resident might become an Urban Bioethics Fellow at Temple; and that a Tulane MPH student with interest in global health do a gun-violence assessment in Philadelphia with Temple or in Botswana or the Dominican Republic with CHOP; and that a CHOP Fellow trained overseas returns to work in Boston with immigrant communities there.

From the Foundation's perspective as a funder, the success of this trust-based philanthropy experience is that these partnerships will continue with or without their involvement, and that the Pillar Partners will be a resource for the smaller organizations they support. From the Partners' perspective, the success of the experience is reflected in our collective sense of how rare and special this community is and in our ability to carry out projects that would not otherwise have been possible. Each of us is more empowered in our health equity work by the trust given and fostered by the Foundation.

4 | CONCLUSIONS

The Pillar Partners' shared interest in focusing on the well-being of children continues to drive the collective energy and commitment to being part of something bigger together. Bringing together institutional partners with a shared mission led to the formation of an essential cross-institutional network. Open communication and real opportunities to support each other have amplified our existing networks and impact as well as created the potential for larger funding sources, co-publications, cross-training, and other opportunities not previously contemplated by the institutions until the collaborative model had been co-constructed.

It is the responsibility of funders, and certainly, in their self-interest, to eliminate competition between organizations to whom they provide financial resources and support. By facilitating trust and collaboration, funders are uniquely positioned to foster collective, higher-impact work. It may seem like a heavy lift, but implementing momentous change can achieve even bigger results.

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CONFLICT OF INTEREST STATEMENT

The authors declare that they have no conflicts of interests, and other than the funding described in the submission, no external funding to report.

DATA AVAILABILITY STATEMENT

No data included in manuscript.

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⁸ <https://violenceprevention.tulane.edu/content/pincus-scholarship>.

⁹ <https://www.wcupa.edu/coral/tuckmanStagesGroupDevelopment.aspx>.

ENDNOTES

¹ <https://www.trustbasedphilanthropy.org/>.

² <https://www.philanthropy.com/article/some-funders-are-embracing-trust-based-philanthropy-by-giving-money-without-lots-of-obligations>.

³ Kottke, Thomas E., et al. "Philanthropy and beyond: creating shared value to promote well-being for individuals in their communities." *The Permanente Journal* 21 (2017).

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