

# THE HEART OF PHILANTHROPY

By Thomas F. Beech

When philanthropy professionals gather at meetings and conferences, the general questions we focus on usually begin with *what*. What is the content of our work? What are the most important problems for us to work on. We also ask a lot of *how* questions. How can we do our work more effectively? How can we collaborate? Occasionally, we ask *why* questions of ourselves and one another. Why do we care about our work? Why do we operate in this way? But seldom, if ever, do we ask the deeper questions about what gives meaning and purpose to our work.

- How do we express our identity and integrity in our work?
- What led us to this work in the first place?
- How can we build and maintain trust in our working relationships and take responsibility for our whole selves in these relationships—courage and fear, light and shadow?
- Where can we find the courage to face the challenges and opportunities this work presents us with?

It is important to ask and answer these deeper questions because philanthropy comes from within. Philanthropy is heartfelt work and as such is an honest reflection of deeply held values and beliefs that guides our lives and molds who we are.

These questions also are important because, while we all know that good philanthropy involves skill, knowledge, competency, organizational effectiveness, and solid planning, we also know that philanthropy, at its best, involves relationships based on trust, mutual respect, and integrity. These relationships—grantor/grantee relationships, board/staff relationships—are at the core of our work. They are the true currency that enables all that we accomplish. In philanthropy, the quality of these relationships depends on our capacity to invest ourselves in them. Without investment from our hearts, philanthropy is nothing more than business as usual.

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Yet we can't invest ourselves in a relationship until we have a handle on who we are, or put another way, until we have possession of what we want to invest. Thomas Merton said, “We are called to give our hearts, but first we must have them in our own possession.” But there are powerful forces within and around our work that tend to discourage us from asking these deeper questions. Often these forces cause us to neglect or even abandon the self-reflection and self-investment that contributes to trust-filled relationships.

- We experience great pressure to be objective. When coupled with equally great pressure to be correct, the result often makes us appear aloof, distant, even arrogant to potential applicants and grant recipients as well as our colleagues in philanthropy.
- Perfectionism crowds out and denies the value of risk taking and the inevitable mistakes and errors that accompany it. This sometimes leads to impatience with complexity and paradox. Perfectionism masks our vulnerability and it erodes approachability.
- Politeness is valued in philanthropy out of our legitimate desire to be pleasant, to be fair, and to be understanding. Too often, however, it is used to deny or subdue legitimate conflict and legitimate differences of opinion. Too often, it leads to dysfunctional and dishonest working

relationships internally and externally. Too often, it is used to maintain positions of power and paternalism.

- The pressure of time forces us to reach conclusions, make decisions, and show measurable results too quickly. This pressure works against taking the time to be inclusive, to grow the trust on which solid working relationships depend, to develop and test alternatives, and to deal with complex realities.

## FINDING OURSELVES IN OUR WORK

Taken together, these forces threaten to undermine the heartfelt nature of philanthropy. Literally, we are at risk of “losing ourselves” in our work. So, how can we find ourselves—our true selves—in our work? How can we invest ourselves in trust-filled relationships? How can we reclaim the heart of philanthropy? At least part of the answer lies in being able to work on the kind of “deeper questions” noted above. Most of us ask these questions about ourselves in times of introspection and private reflection, but we need to find ways to ask them more openly, discuss them with others, and learn with and from others.

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Several small groups of professionals in philanthropy have begun to explore ways to do this using a process called *formation*, developed by Parker Palmer, author and former senior advisor to the Fetzer Institute. Among the key principles of formation are these:

- Every person has access to an inner source of truth, named in various wisdom traditions as “soul,” “spirit,” or “heart,” a source that can be accessed to guide the work we do but that is often neglected in professional education and service training.
- We can create open and trustworthy spaces in which people can listen for and speak their own truth without fear and listen to the truth of others without rushing to judgment, fully respecting the confidentiality of what is said. In this trustworthy space, we stay in relationship with one another, neither trying to fix one another nor ignore one another.
- Through the use of metaphorical materials—poems, stories, and works of art—we can be drawn toward the deeper questions of meaning and purpose that arise in our work.
- We can join in a respectful, evocative, and yet challenging communal inquiry about the inner dimensions of our work that will not only affirm us, but stretch us and correct us, since all of us reflecting together are more insightful than any one of us reflecting alone.

The formation process usually involves a group of 10-20 people, guided by a facilitator who respects and follows these principles. The meetings employ a retreat format, lasting two to three days, and in some cases, groups continue to meet in a series of retreats. It is also possible to introduce the formation process in shorter group meetings of a day or less. The retreat format is preferable because as this process continues, participants develop a sense of safety that allows them to tell their own truth more directly and hear their own truth in fresh and compelling ways. We believe that this process holds great potential to help growing numbers of people in philanthropy reconnect with the heart of philanthropy, and we invite you to join us in this exploration.

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