Blue Ocean Philanthropy:
If Philanthropy Is All About Relationships,
Then Why Do We Measure Only Money?

James M. Hodge
“It is not so much a matter of technique that is important, but rather the spirit behind the technique.”

-Viktor Frankl
Allowing the urgent to take the place of the important in our lives
The Philanthropic Road Less Traveled
Philanthropy Is Not About Money

Philanthropy is all about meaning
Humans are meaning makers
Money-to-meaning transformation
Money and entrepreneurs and inventors
Money as a way to keep score
Money as a way to pursue one’s passions – or to allow others to pursue their passions
Mr. Edison, you are a rich man ...
Edison’s “Vision” Statement

Make lightbulbs so inexpensive that only the rich can afford to burn candles
“For me, the product means nothing. It can be oil or platinum or software or widgets. For me it’s the delicious pleasure of seeing where to go before the crowd does; the challenge of making fast decisions; the fun of outsmarting everyone else. It’s all a shell game played for big money.”

-Walt Disney
If we focus on money rather than meaning we will be less aspirational for our organizations and less inspirational for our benefactors.
Money and Happiness
Fulfillment Curve

Adapted from
*Your Money or Your Life*
by J. Dominguez and V. Robin
Fulfillment Curve

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Fulfillment

Money Spent

Enough
Fulfillment Curve

Adapted from
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Fulfillment

Luxuries

Money Spent
“Things are in the saddle, and they are riding man.”

- Emerson
Examining the quality of our wants
Fulfillment Curve
Adapted from
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The more one has, the more one wants
Fulfillment Curve
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Generativity
The Cliff Notes
We can either make our life a gift OR We can become self-absorbed
Material to Spiritual Shift
“In truth, we are called to become more and more human; we must discover the freedom to go beyond limits imposed on us by our world and seek self-fulfillment.”

—Joan Erikson
Life Review

“But the passing of time forces each of us to take stock and ask: What have I accomplished so far? What do I still wish to accomplish?”

-Bill Gates 2008
Ultimate Fulfillment

Spiritual concerns rise in the value hierarchy
Money Spent

Fulfillment

Through Philanthropy

Meaning

“Doing good”

“Saving the world”

“Truth”

“Doing well”

“Savoring the world”

“Beauty”

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- Integrity
- Self-Absorption
- Stagnation

Generativity

Learning – Earning – Returning – Discerning

Money Spent

15 30 45 60 75 Death

Money Spent
It is how you spend your money and on whom that is important
A focus on ideas and idealists
Entrepreneurs as Philanthropists

- Passionate
- Grateful
- In control of assets
- Reasonable risk takers
- Know how to evaluate business and philanthropic ventures
- Curious
- Want to make informed decisions not only about business, but about philanthropy
Caring/Sharing (Dream makers caretakers)

Four Basic Brain Drives*

Acquiring (Things/ experiences)
Defending (Assets/family)
Learning (Dreamers/ innovators/ entrepreneurs)
Caring/ Sharing (Dream makers caretakers)

Propensity toward accumulators
Propensity toward givers/philanthropists

*From Driven, Paul R. Lawrence and Nitin Nohria, Harvard Business School, 2002
Passion, philanthropy and “flow”
Entrepreneurs and Urgent Optimism

Urgent optimism is the desire to act immediately to tackle an obstacle, combined with the belief that we have a reasonable hope of success.

-Jane McGonigal
Passion grafts and passion transplants
What drives entrepreneurs crazy?

- All talk – no action
- Committees
- Waste – time and resources
- Small ideas
- Anyone who is not the best in her field – or striving to be
- An unwillingness to partner
- When their opinions don’t matter as much as their money
“God gave me one big head …”
Resources as Viewed by Engaged Philanthropists

- Intellect
- Passion
- Time
- Talents
Resources as Viewed by Engaged Philanthropists

- Modeling
- Replicating
- Scaling
Resources as Viewed by Engaged Philanthropists

- Rolodex
- Connections
- Door openings

BUSINESS EXPERIENCE

PERSONAL

INTER-PERSONAL
Resources as Viewed by Engaged Philanthropists

- Philanthropy
- Investments

INTER-PERSONAL

BUSINESS EXPERIENCE

PERSONAL

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Philanthropy is more about openings than about closings
Changing our stance, altering our focus, and engaging in new dialogues
Shift from raising dollars to raising sights
Shift from problem solving to highest hopes and aspirations
Shift from “scheming for money” from benefactors to “dreaming of possibilities” with benefactors
Stop Selling – Start Compelling
The “push-pull” of philanthropy

Simply put …

… we must stop chasing money and start pursuing meaning in and through philanthropy
Pull

This is the lure of an attractive goal, or a strongly desired good, recognized by Plato and Aristotle as well as by many other great thinkers of the past … embodying a valued ideal.

It attracts us and calls us to put forward our greatest efforts.

The greater the ideal, the greater the power it can have in our lives.
Material to spiritual shift
It Is Not About How Many Times You Touch a Benefactor

It is how deeply you engage a benefactor in the story of their lives
The State of Philanthropy Today

- Mainly transactional
- Need-based
- Taking rather than giving
- Size rather than significance
- Selling rather than compelling
- Short stays rather than long commitments
- Institutionally directed rather than co-created
Relationship-Based Philanthropy Is Not About:

- Money
- Number of benefactor contacts
- Algorithms and formulas
- “Moves Management”
- Selling anything
- Major, mega and ultimate gifts
Relationship-Based Metrics Are All About:

- Genuine encounters, engagements and experiences with benefactors
- Gifts of significance
- Meaning, difference, purpose and impact
- Benefactor-centric, relationship-based, values-driven philanthropy
The currency of our profession is the enduring good we do together with philanthropists, not the amount of money we raise from benefactors.
Dreams, I have come to believe ...
“We are both forward leaning and forward thinking beings and as such require spiritual points along the horizon upon which to fix our eyes.”

~Author unknown
Creating spiritual points along the horizon for Anschutz Medical Center
Inspiring

- Stories of impact, difference and legacy
- Isn’t it amazing ...?
- Future and action oriented
- Can you imagine ...?
- Would you be open to be inspired about a big idea ...?
Isn’t it amazing ...
Can you imagine …
What are the sticky messages for Anshultz?
Who are your contagious messengers?
Nonprofit’s Mission and Vision

Benefactor’s Values and Aspirations

Development Officer’s Integrity and Passion

Gifts of Significance
Mind the Gap
A deep and enduring respect for benefactors
I-Thou relationships
That which we focus our attention on, we become
Refocus on the spiritual side of our work and not on techniques to raise money.
Renew the noble calling as a spiritual task
The moral dimensions of philanthropy
Creating moral biographies

—Schervish
Fundraising as moral training
Fundraisers as agents of change
Philanthropy as noble acts in a well-examined life
Ethical Inspiration and Appreciative Inquiry
Supply-side philanthropy not scarcity-model philanthropy
Not a Zero-Sum Relationship
Pull

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Co-creating idealized futures
Who are your contagious messengers?
Questions of significance
Questions and “Permissions and Protections”

Trust and the evolving relationship
Master Key Questions

What would you like to do with your money to bring more meaning to your life?
How much is enough for the children …
Relationship-Based Metrics

Qualitative Metrics
Leading, Mentoring and Coaching

Not micromanaging contacts, proposals and dollars raised
Necessitates Longer Development Officer Tenures

Institutional commitment to transformational philanthropy
Relationship Quotient

What is the depth of their commitment to your organization?
Benefactor Relationship with Nonprofit Organization

Weak          Some          Strong
Relationship Equity

What is your relationship potential with this benefactor?
Relationship Between Development Officer and Benefactor

Weak | Some | Strong
Mining Your Organization

For sticky messages and contagious messengers
What is the social responsibility of wealth?
The Money-to-Meaning Transformation
Value Seeding
Agents of Change

Moral trainers
Defined by What We Give

“In the beginning we are what we are given, by midlife, when we have finally learned to stand on our own two feet, we learn that to complete our lives, we are called to give to others so that when we leave this world, we can be what we have given.”

-Joan Erikson
Engagements

- Previsit checklists
- Questions mature from facts to values
- Contact reports document potential projects of interest to benefactors
- Other
Practicing “No Surprise” Philanthropy

- Reflective and deepening engagements
- Do they know the purpose of your visits?
- How do they wish to participate/contribute?
- Permission to ask
If you could describe your life’s greatest achievement in one sentence, what would that be?
Triggers and Shifts
Alliant Corporation Study on Legacy

- Values
- Objects imbued with emotional meaning
- Assets
Generativity and Integrity
Creating Authentic Experiences

- Natural
- Genuine
- Inspiring
- Reflective
Relationship Equity and Philanthropy

- Early encounters
- Significant engagements
- Authentic experiences
Benefactors Want to Be Enlightened Philanthropists

So that their gifts reflect well on their philanthropic judgment
Understanding and Assessing

- A philanthropic nature
- Philanthropic maturation
- Values clarification
- Mission/vision overlap
- Philanthropic resonance
- Timing and significance
Measuring “depth, commitment and meaning” of the evolving relationships with benefactors
Questions of Significance in a Well-Examined Life
Inspiring and Inquiring
Lifestyle

“If your output exceeds your input, then your upkeep will be your downfall.”
Lifestyle

The millionaire next door
Entrepreneurial Wealth – Other Wealth?
Gift Readiness

- Right idea
- Right scale
- Right time
- Right asset
- Right gift planning vehicle
End-of-Life Questions

1. What was the meaning of my life?
2. Did I make a difference in the world?
3. What is my legacy to the world?
Motivational Makeup

Fear of failure

Achievement-oriented
Self-absorbed
Other-centric
Energy

Passion grafts
Passion transplants
Empathy: Two Types
Trust: Two Types
Gratitude
Purpose-Driven
Intellectual Curiosity
Decision Making
Philanthropic Discussions: Who Initiates?
Philanthropic Evidence
Learning Styles
Social Styles
Encounters

- Previsit checklists
- Qualitative contact reports
- Visit planning
- The visit – outcomes
- Next steps
Experiences

- Designed
- Strategic
- Mission-related
- Leadership-driven
- In companionship with the committed
An abundant, attractive future