

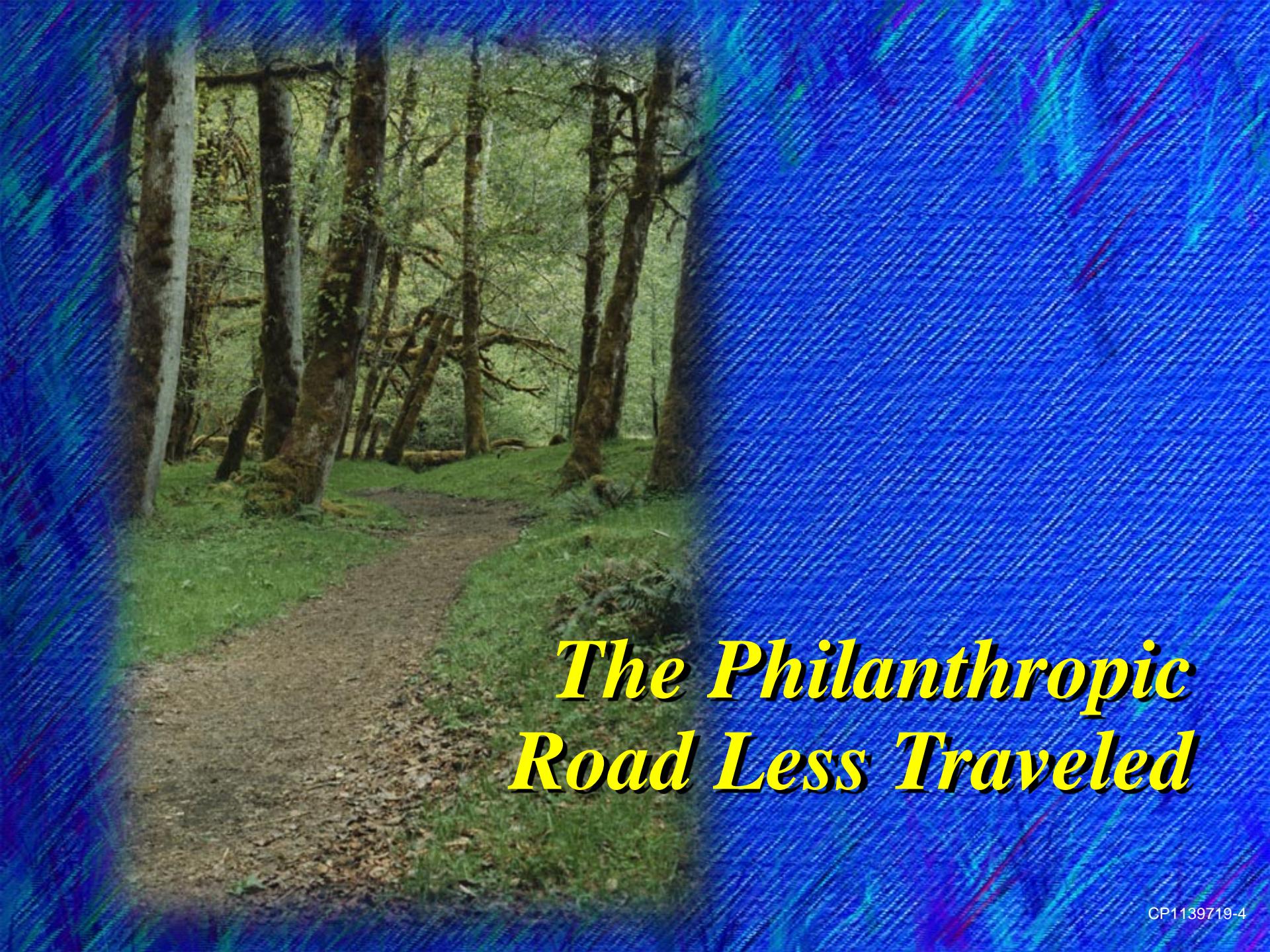
Blue Ocean Philanthropy: If Philanthropy Is All About Relationships, Then Why Do We Measure Only Money?

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

A photograph of a dirt path winding through a dense forest. The path is covered in fallen leaves and leads towards a cluster of tall, mossy trees. The surrounding area is lush and green.

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.”

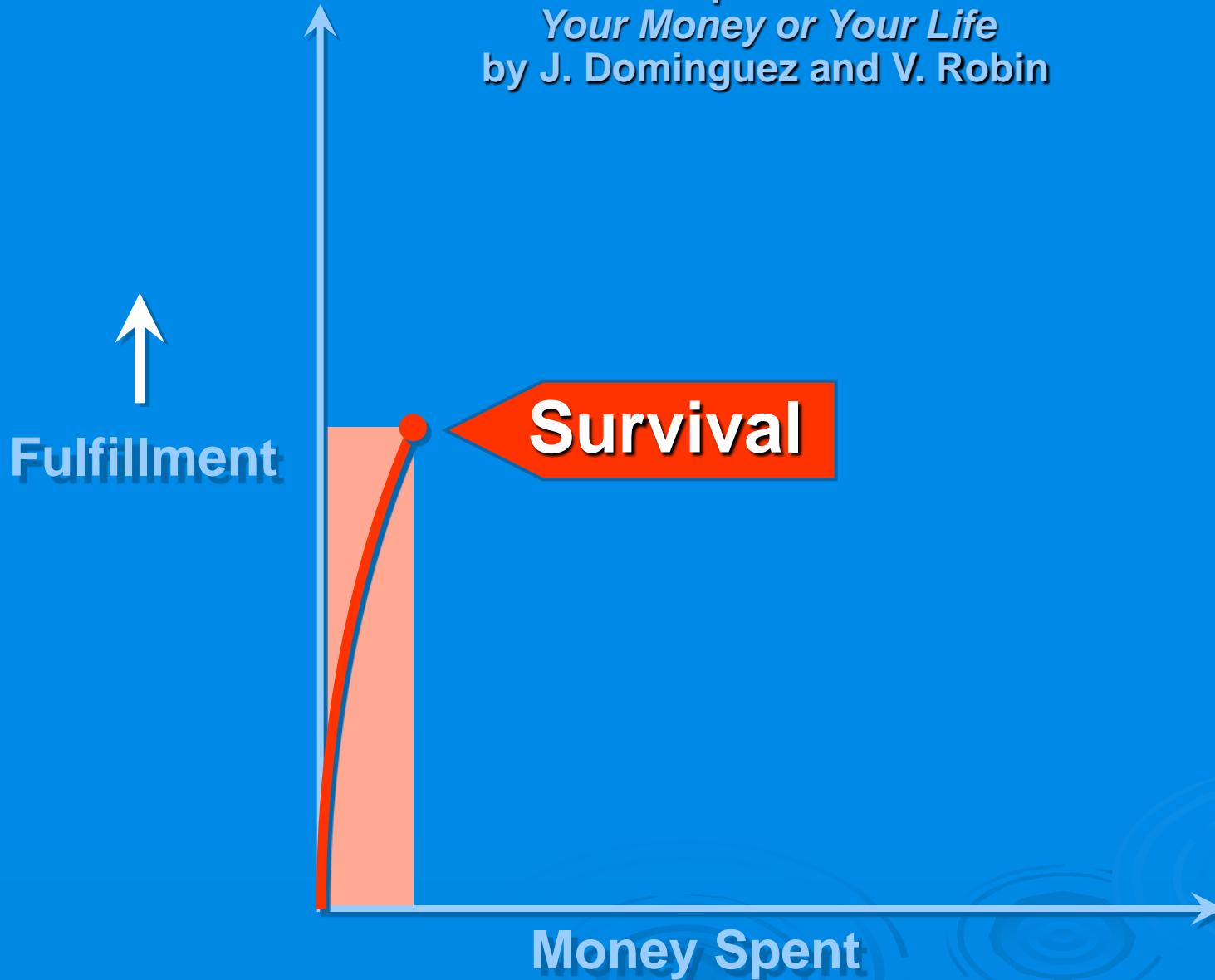
-Walt Disney

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

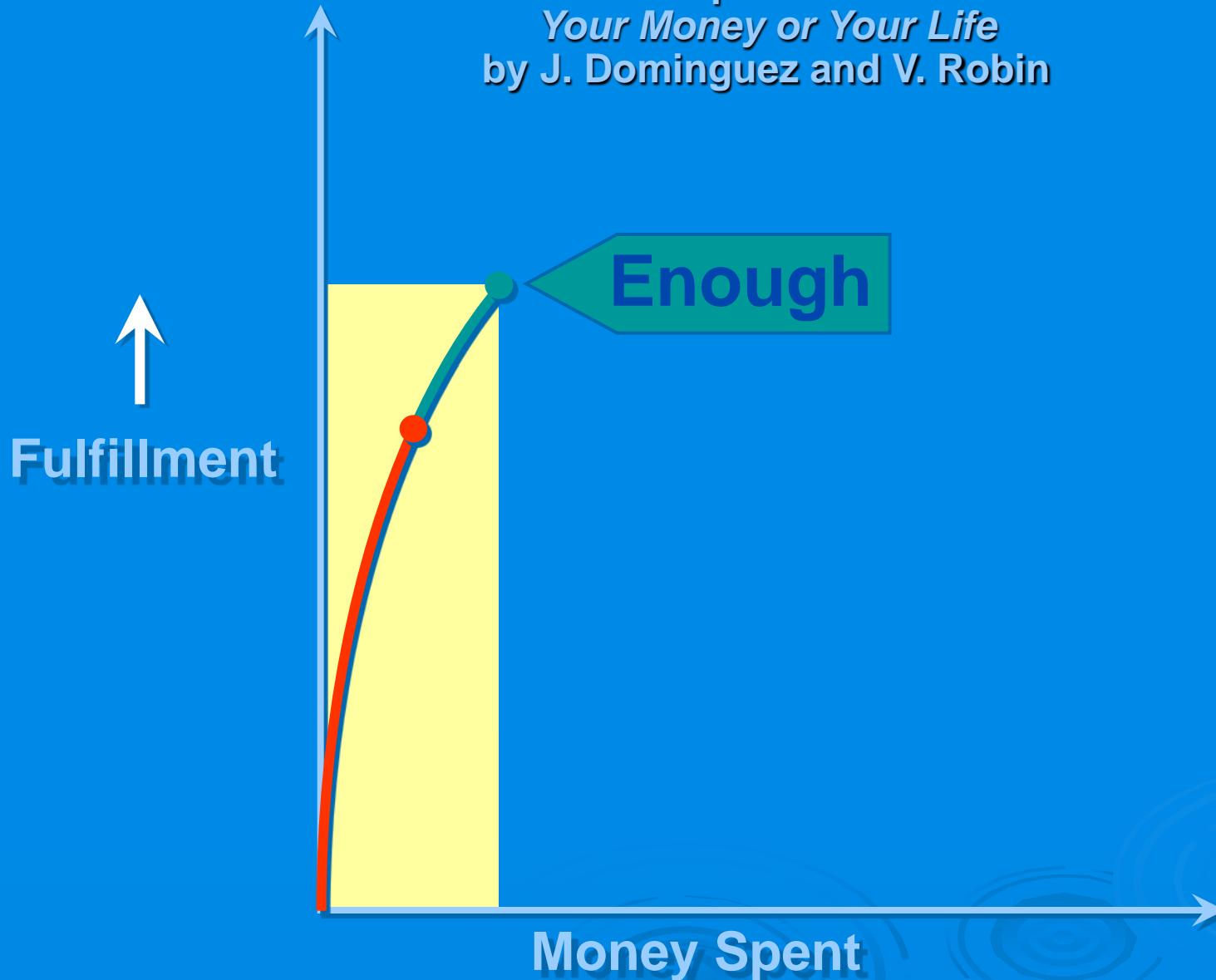
Fulfillment Curve

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



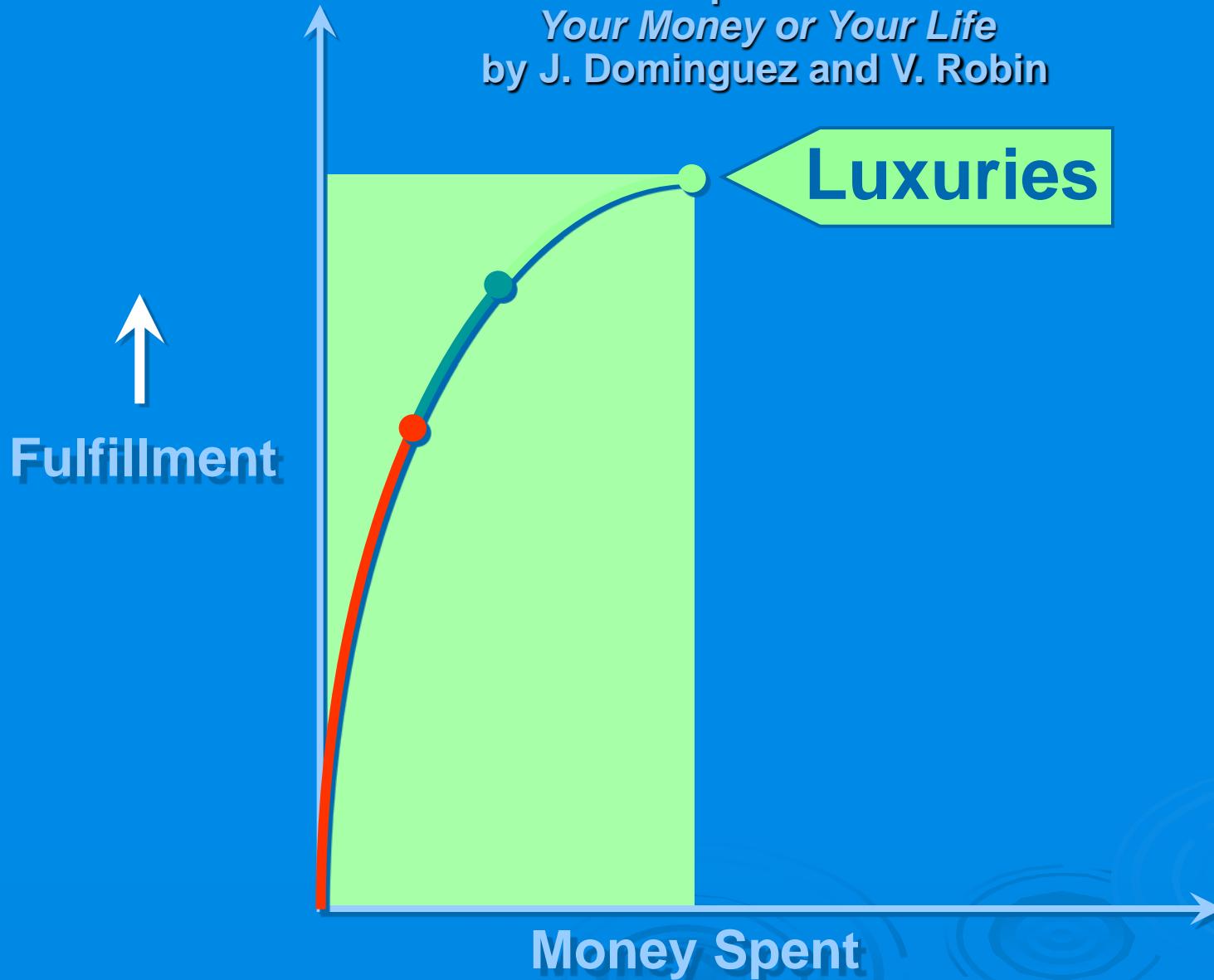
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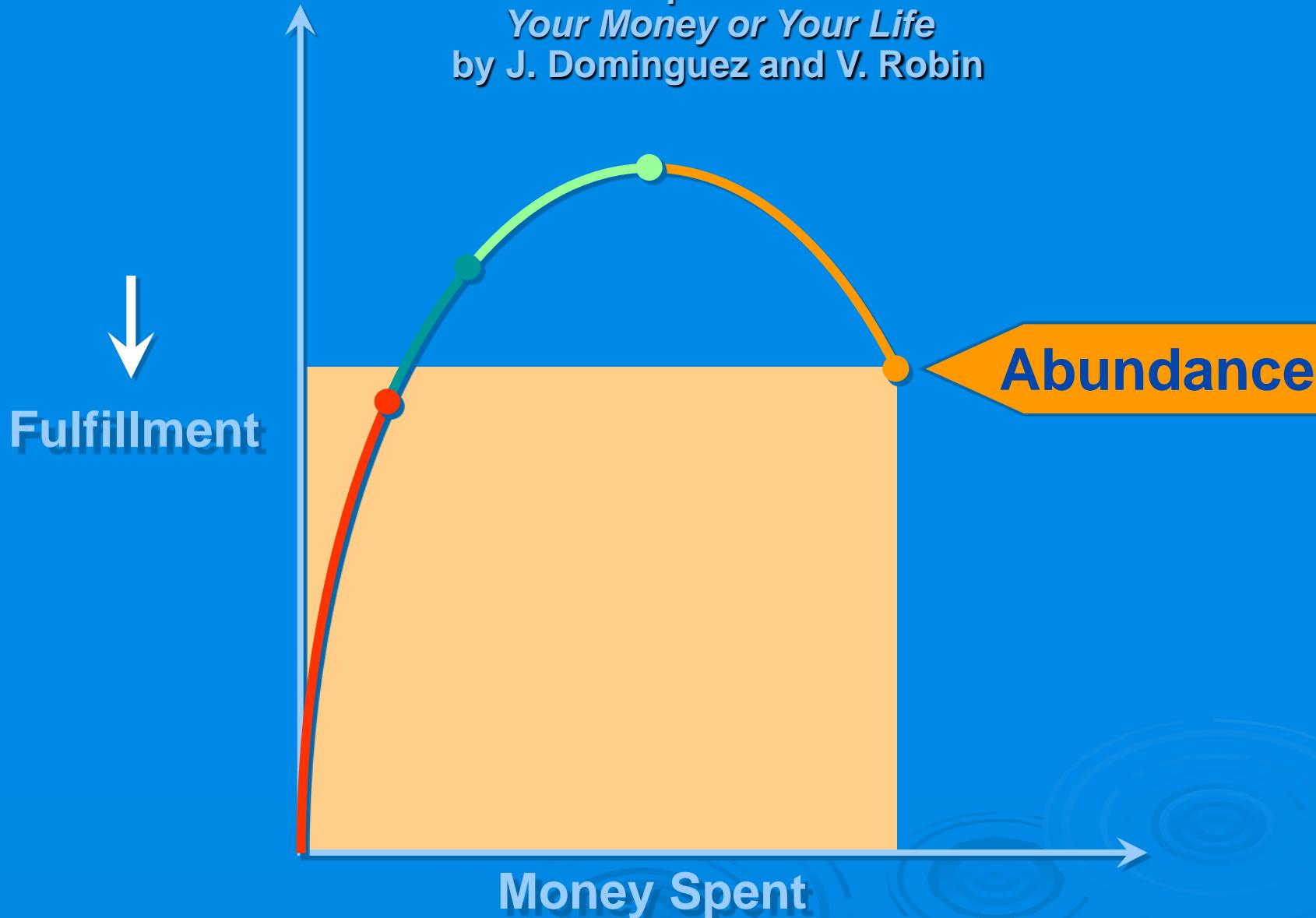
*“Things are in the saddle,
and they are riding man.”*

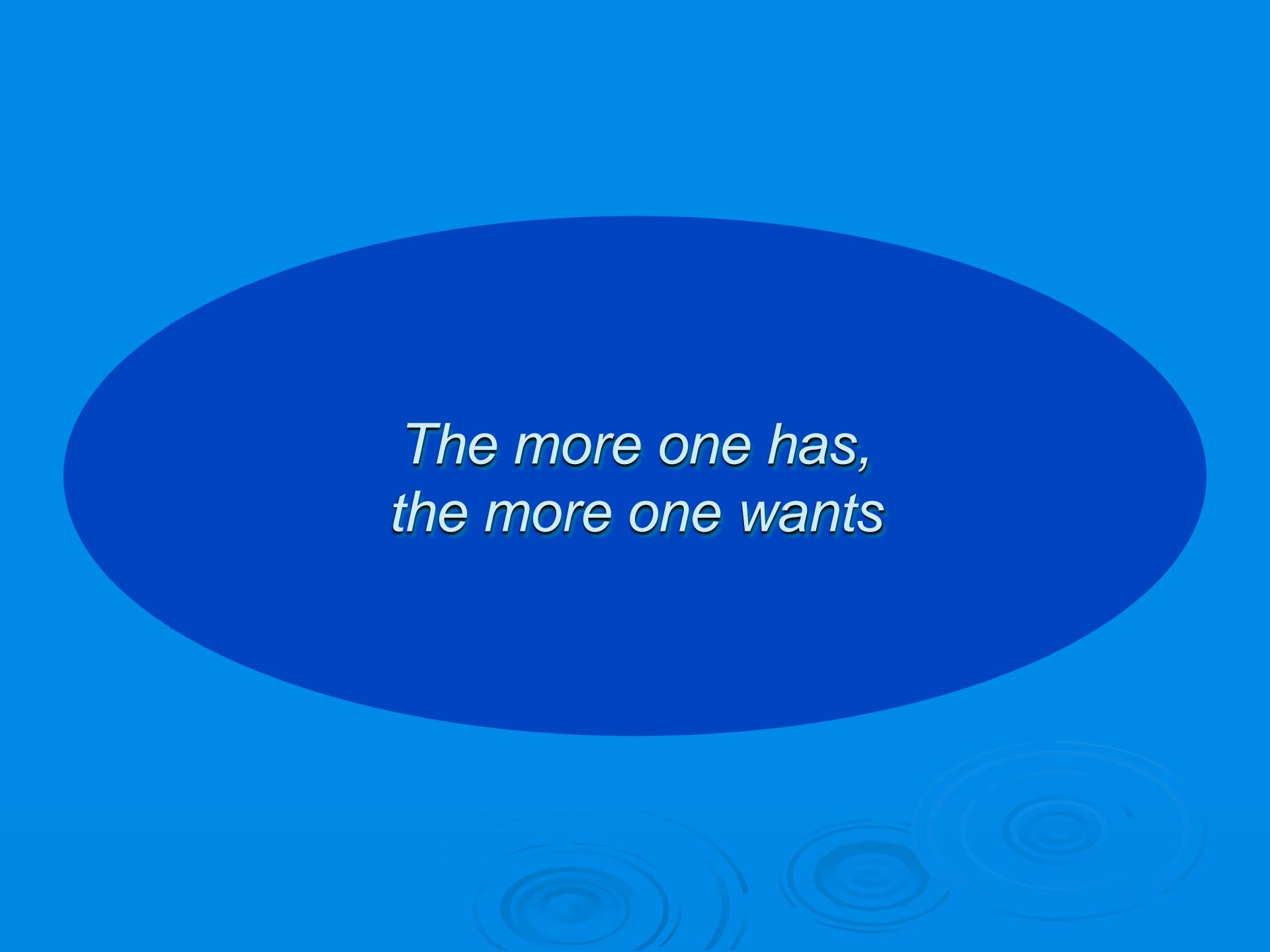
-Emerson

*Examining the quality
of our wants*

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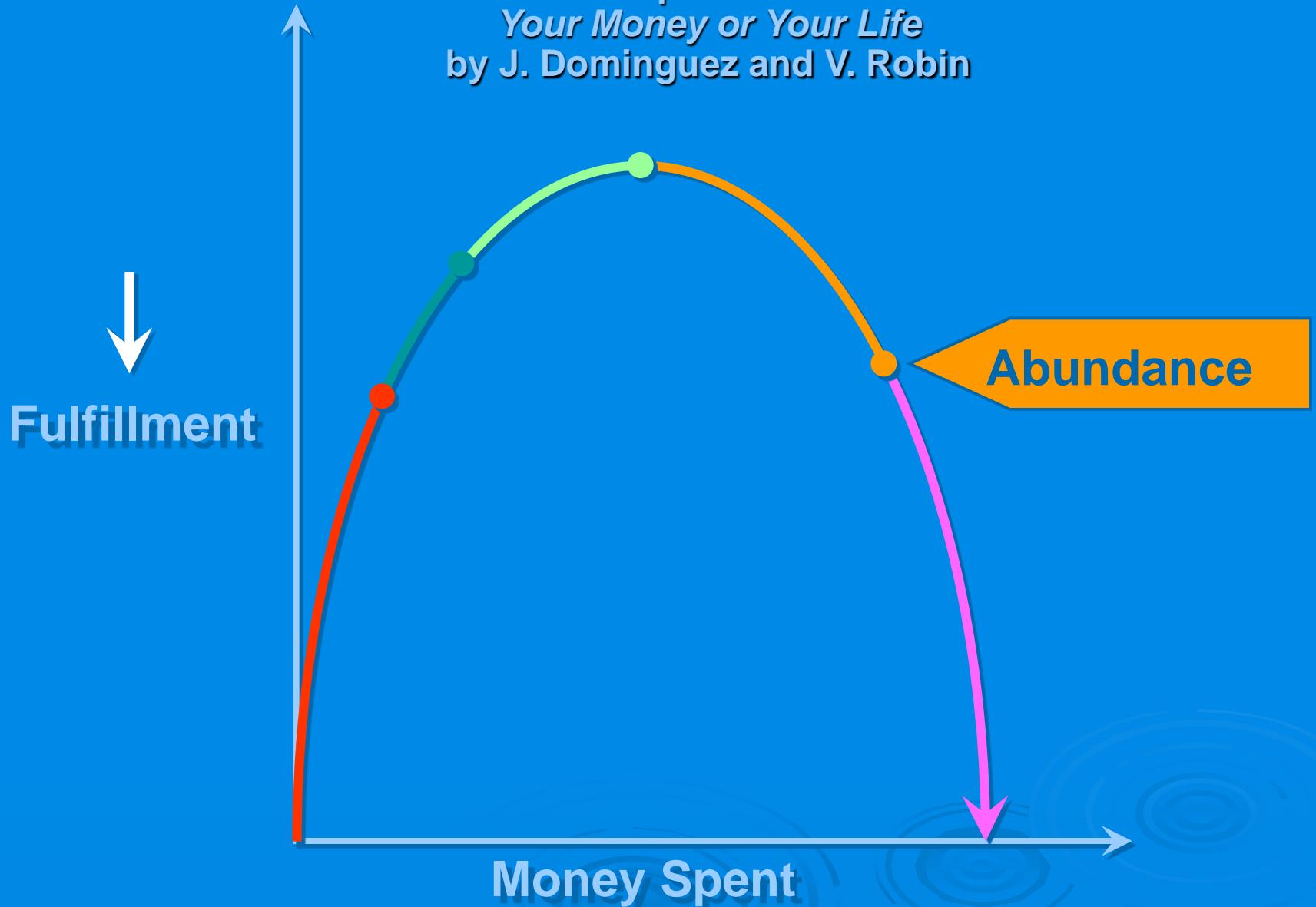




*The more one has,
the more one wants*

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Generativity

The Cliff Notes

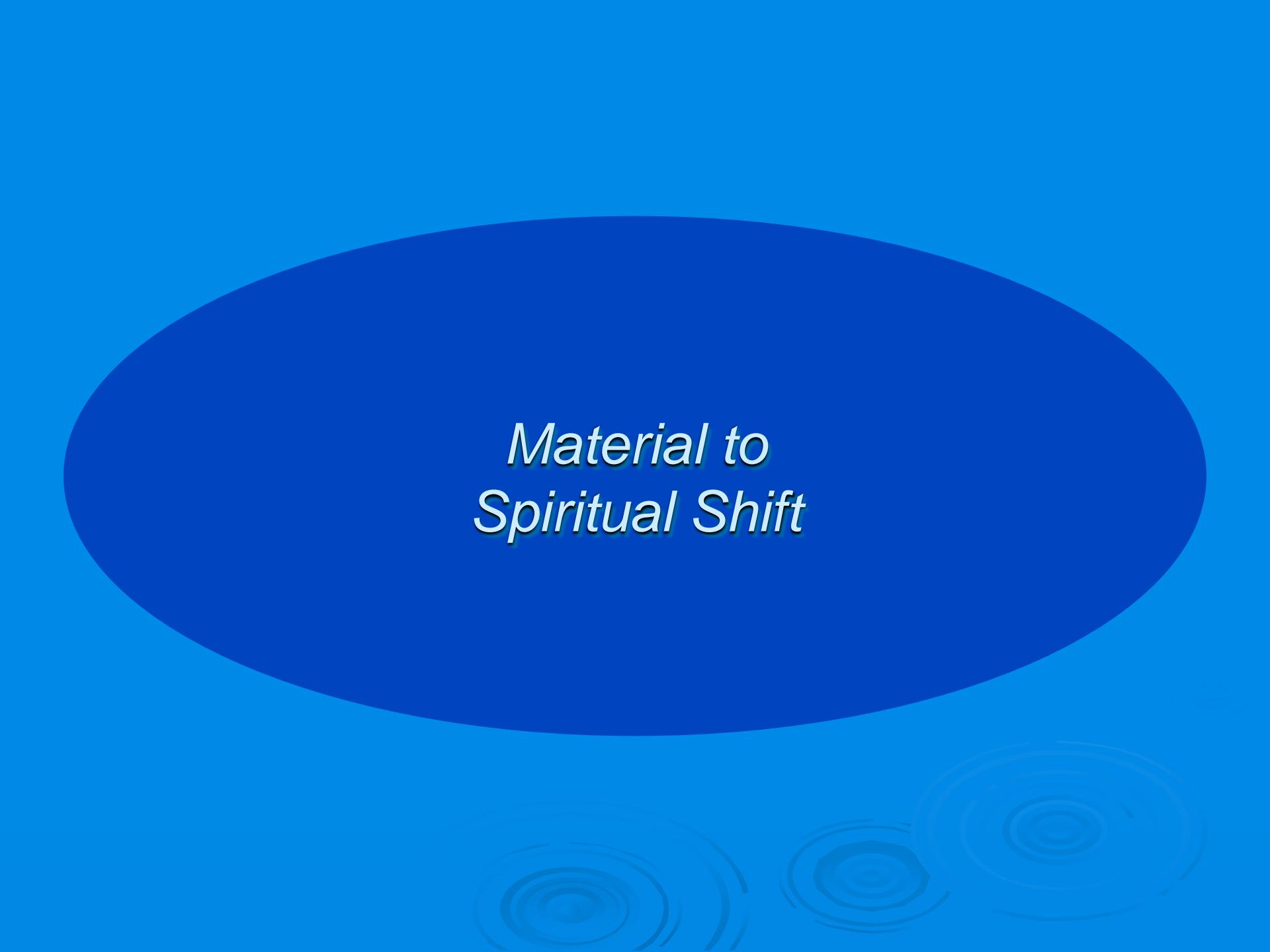
Generativity

We can either make
our life a gift

OR

We can become
self-absorbed

Stagnation



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?”

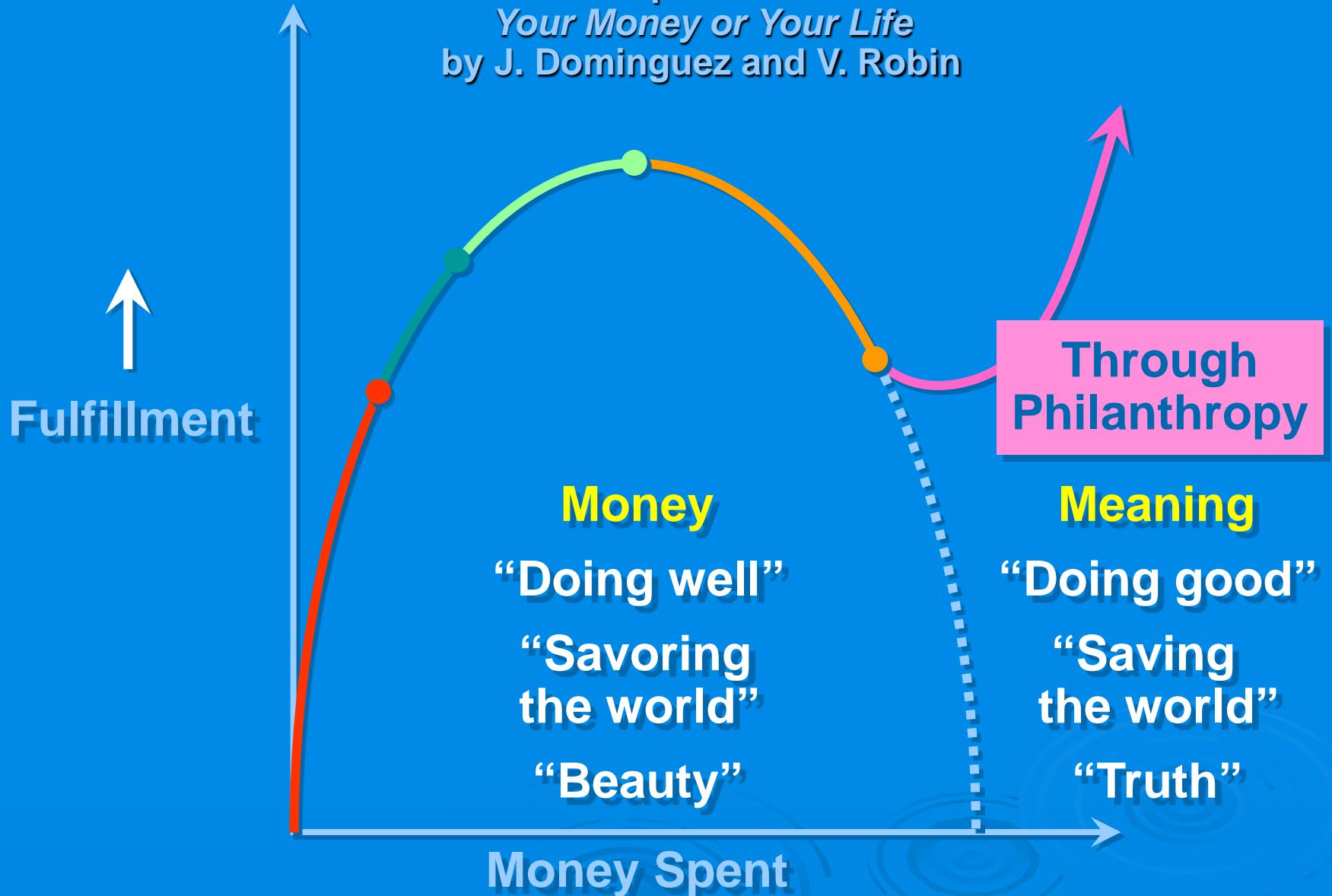
-Bill Gates 2008

Ultimate Fulfillment

*Spiritual concerns rise
in the value hierarchy*

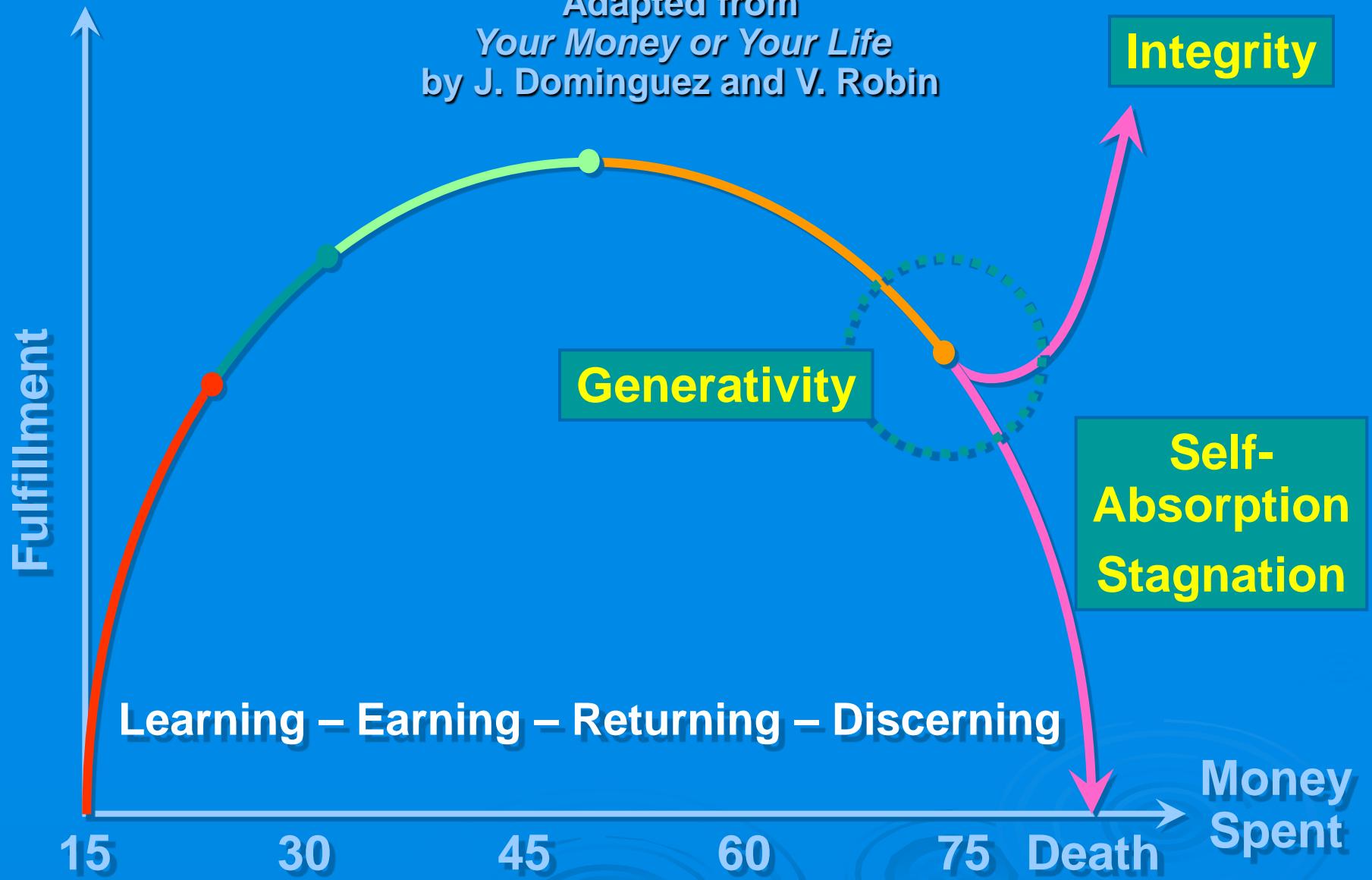
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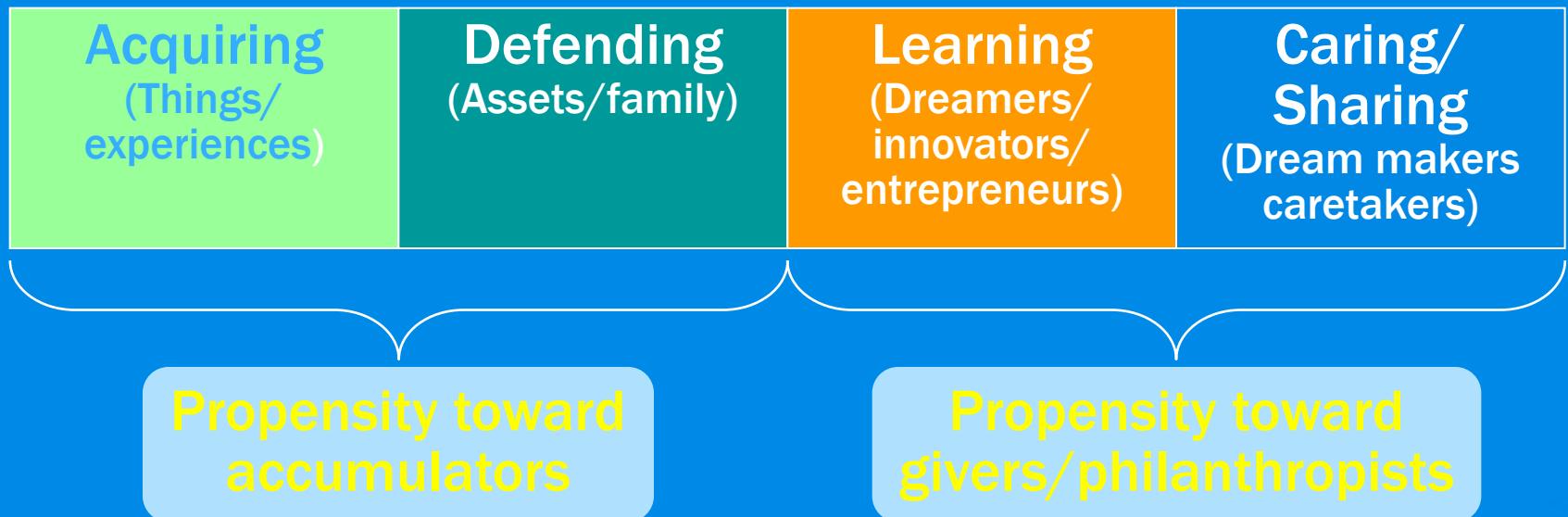
It is how you spend your money and on whom that is important

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

Four Basic Brain Drives*



*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

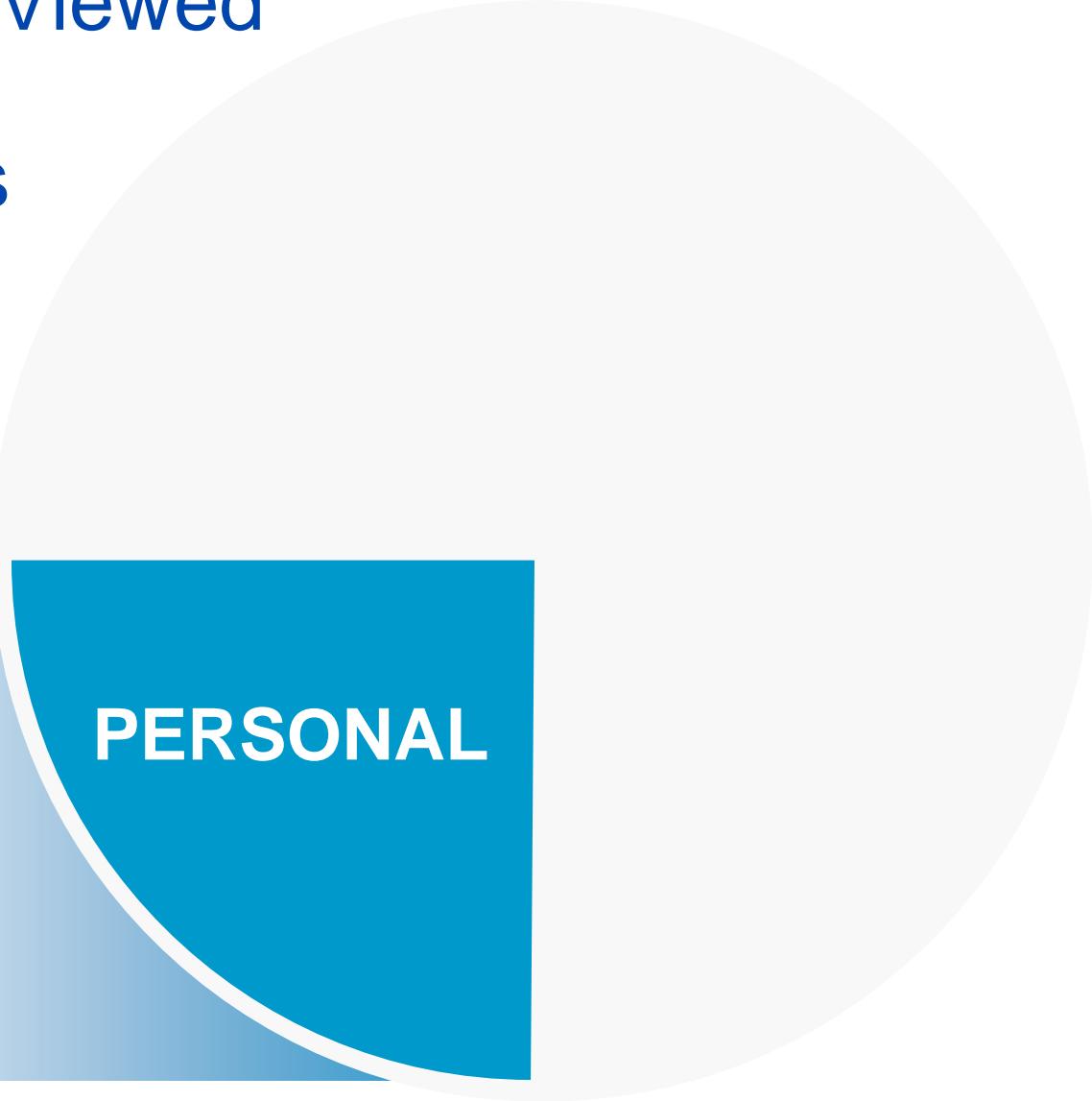
What drives entrepreneurs crazy?

- 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



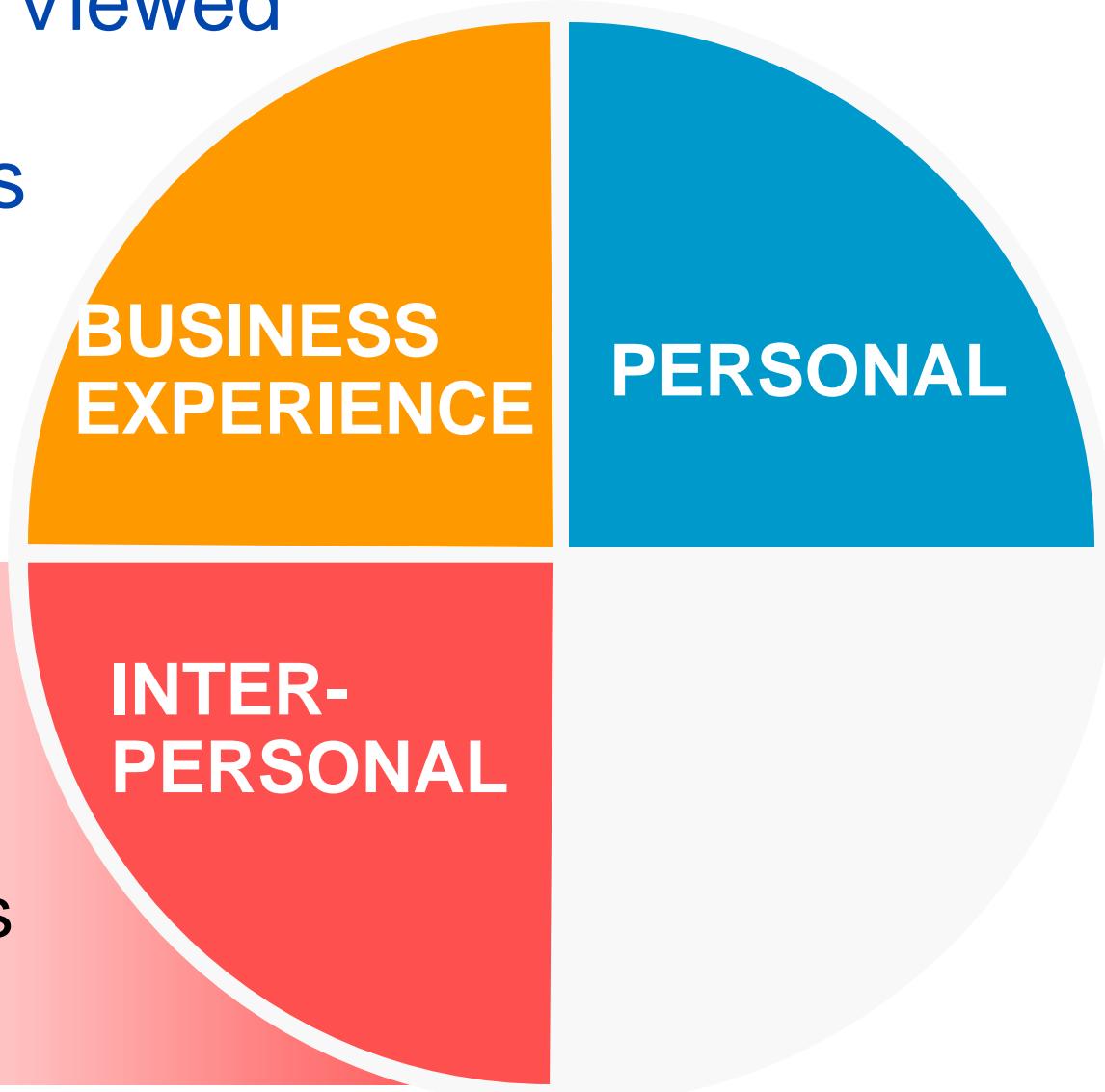
PERSONAL

Resources as Viewed by Engaged Philanthropists

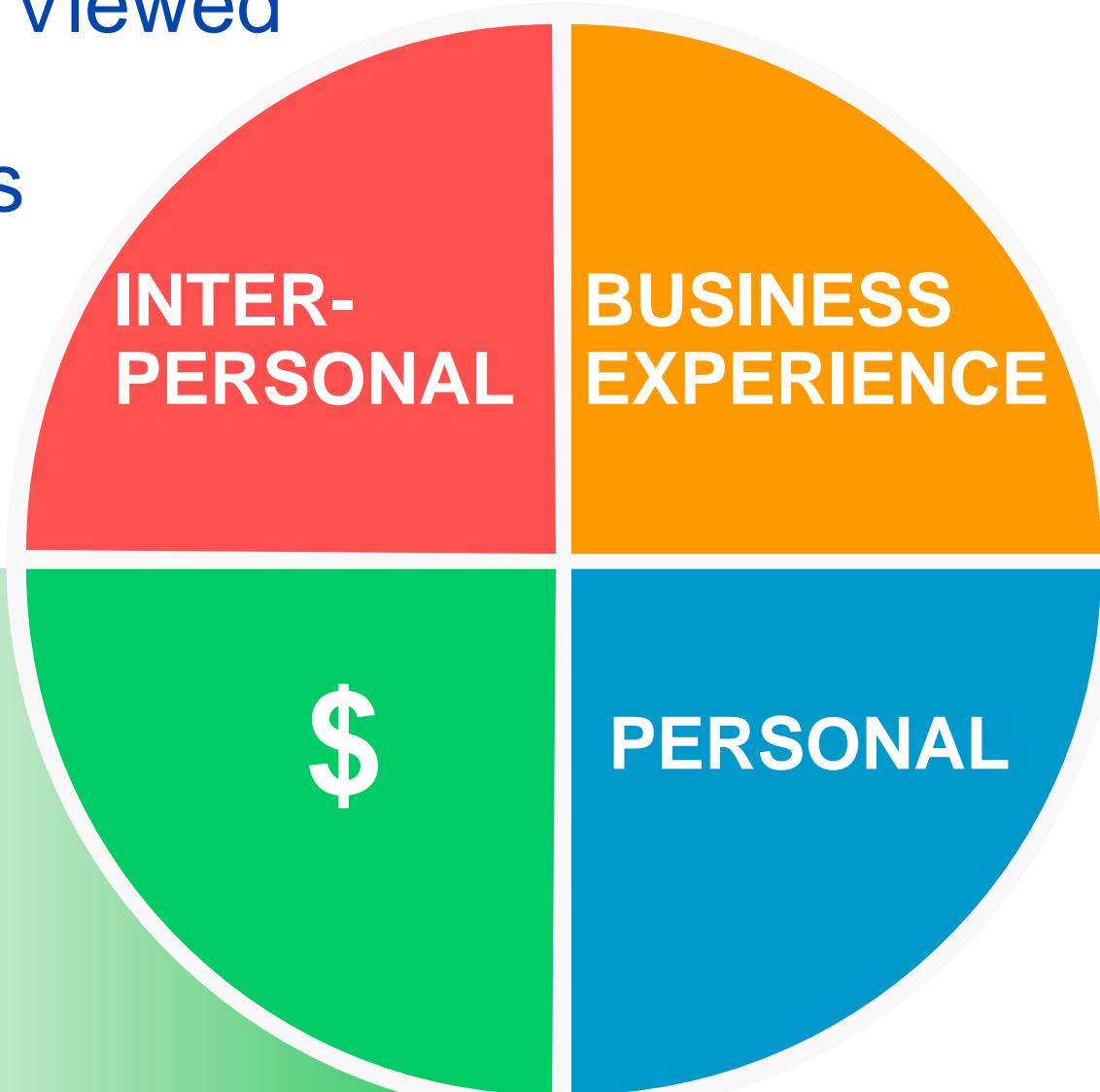
- Modeling
- Replicating
- Scaling



Resources as Viewed by Engaged Philanthropists



Resources as Viewed by Engaged Philanthropists



- Philanthropy
- Investments

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

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 ...?

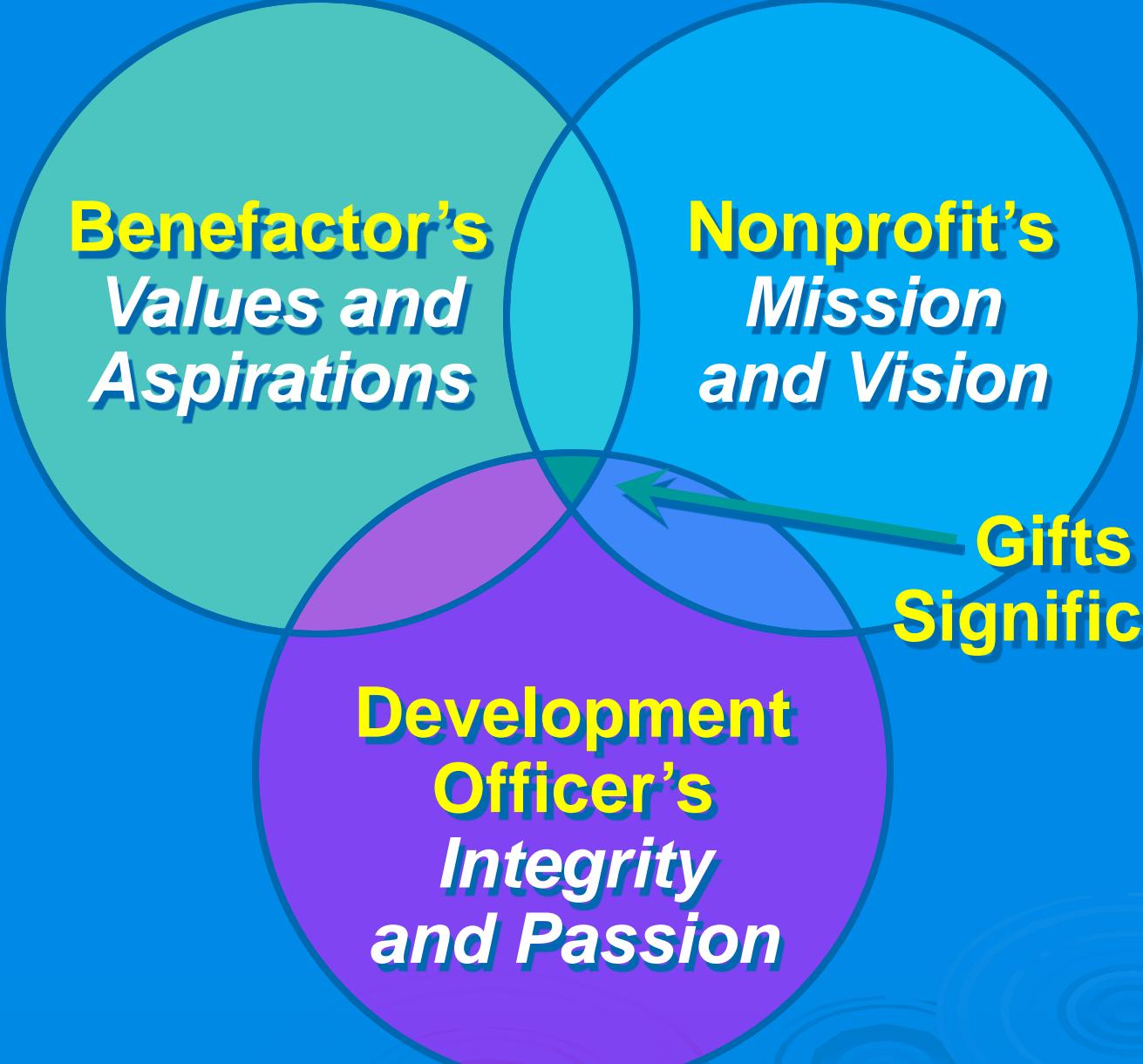
Isn't it amazing ...

Can you imagine ...



What are the sticky messages for
Anshultz?

Who are your contagious messengers?



**Benefactor's
Values and
Aspirations**

**Nonprofit's
Mission
and Vision**

**Development
Officer's
Integrity
and Passion**

**Gifts of
Significance**

Mind the Gap





CP1139719-70

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

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.



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



Relationship Equity

What is your relationship potential
with this benefactor?

Relationship Between Development Officer and Benefactor



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