

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

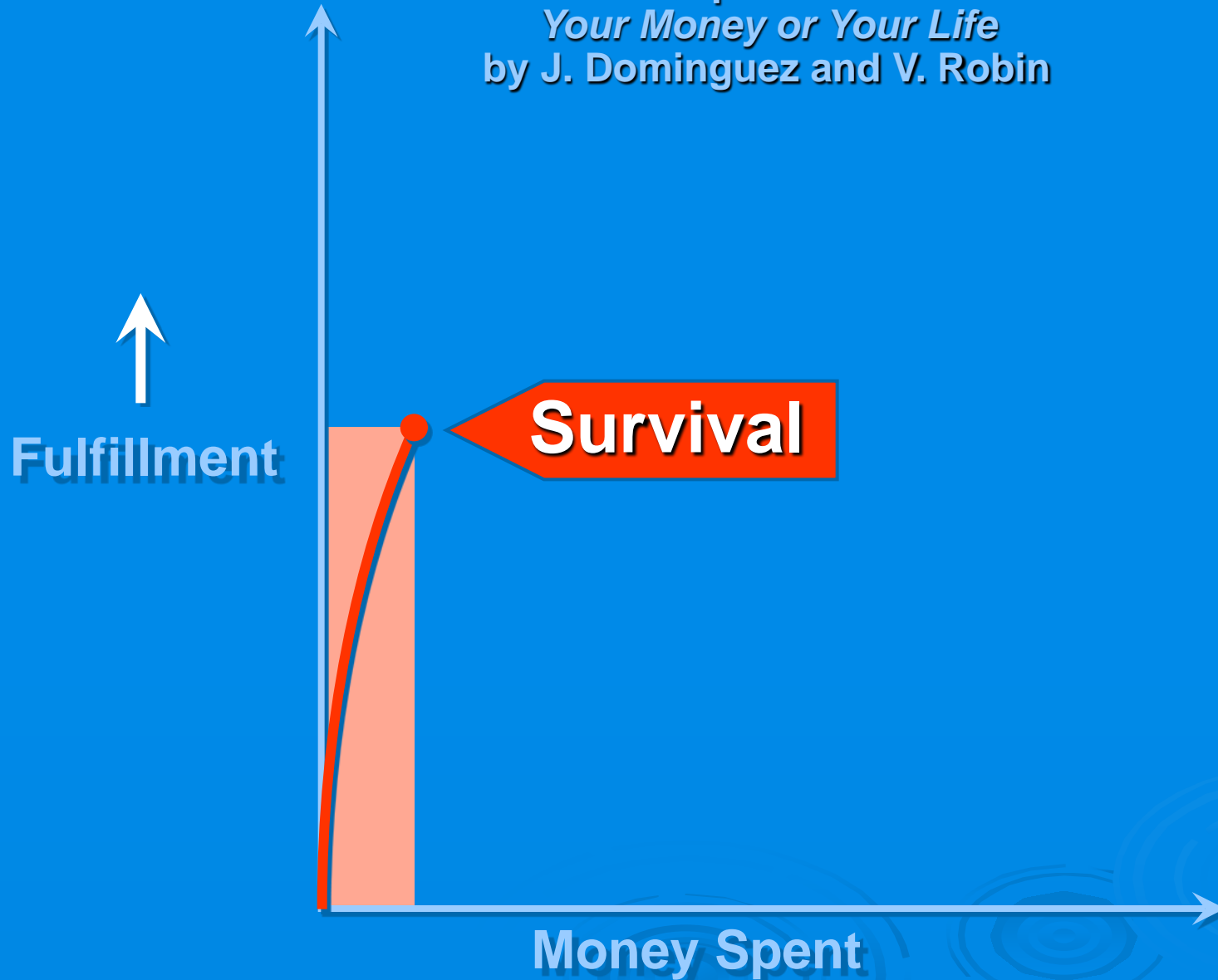


Money and Happiness



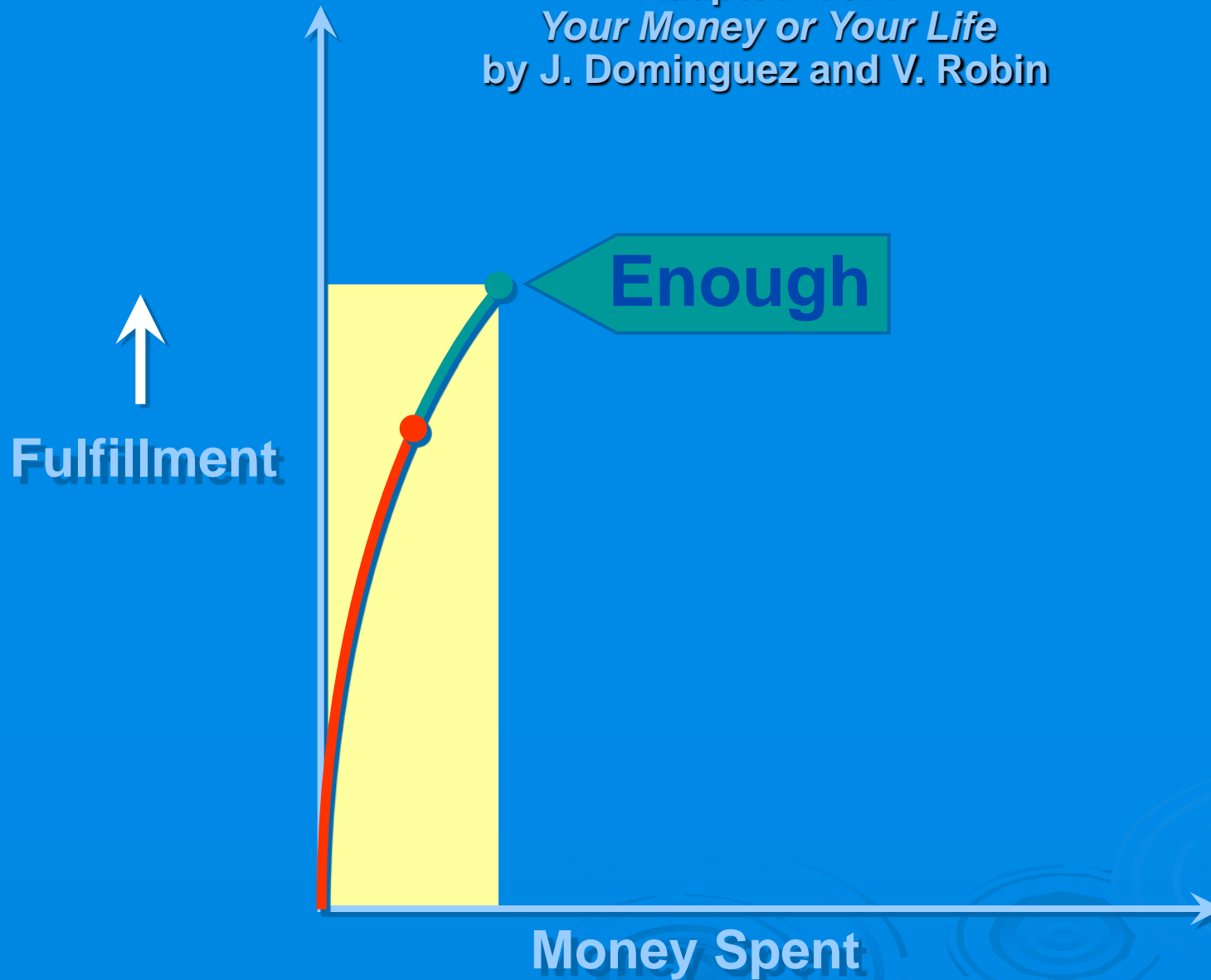
Fulfillment Curve

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



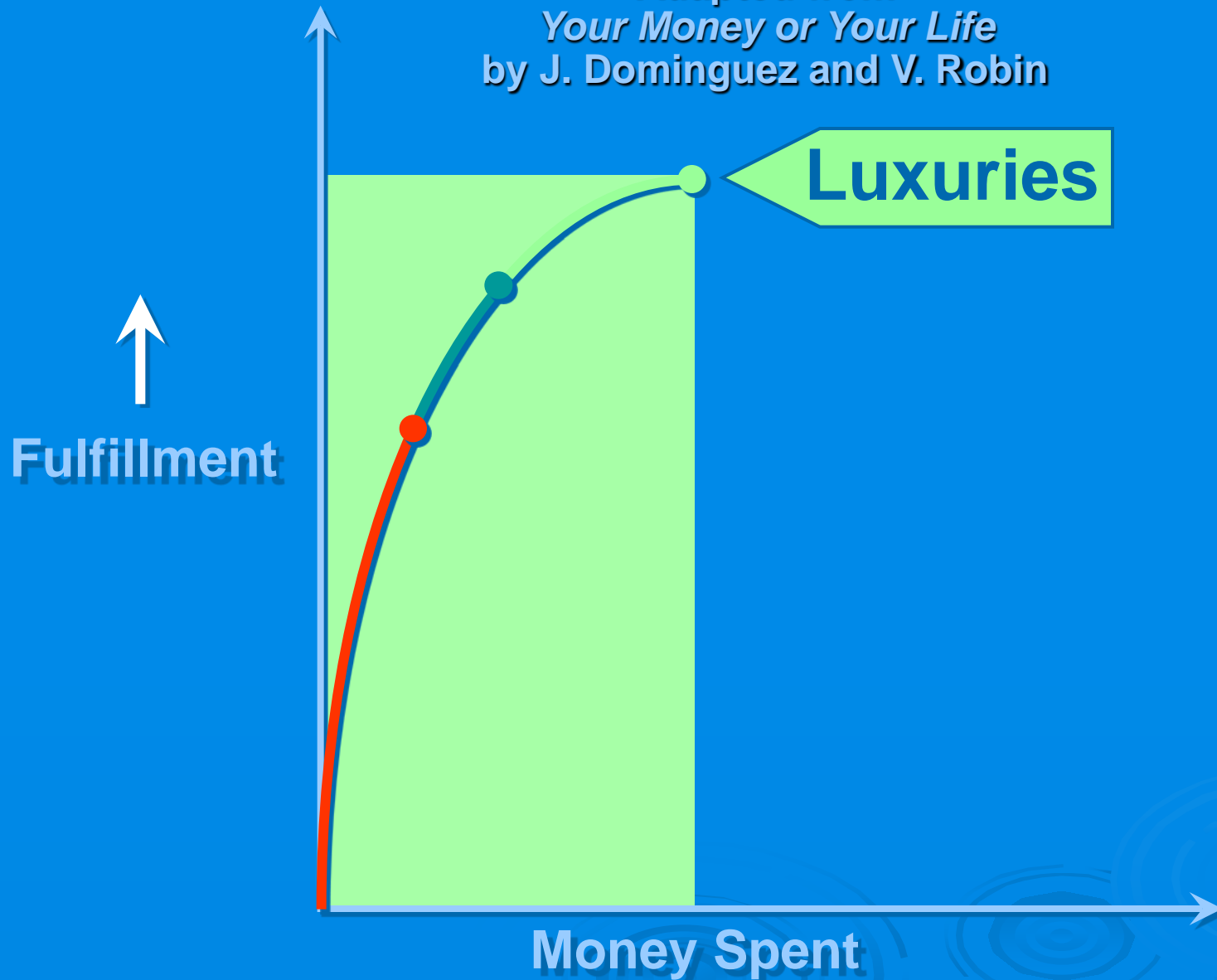
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*“Things are in the saddle,
and they are riding man.”*

-Emerson

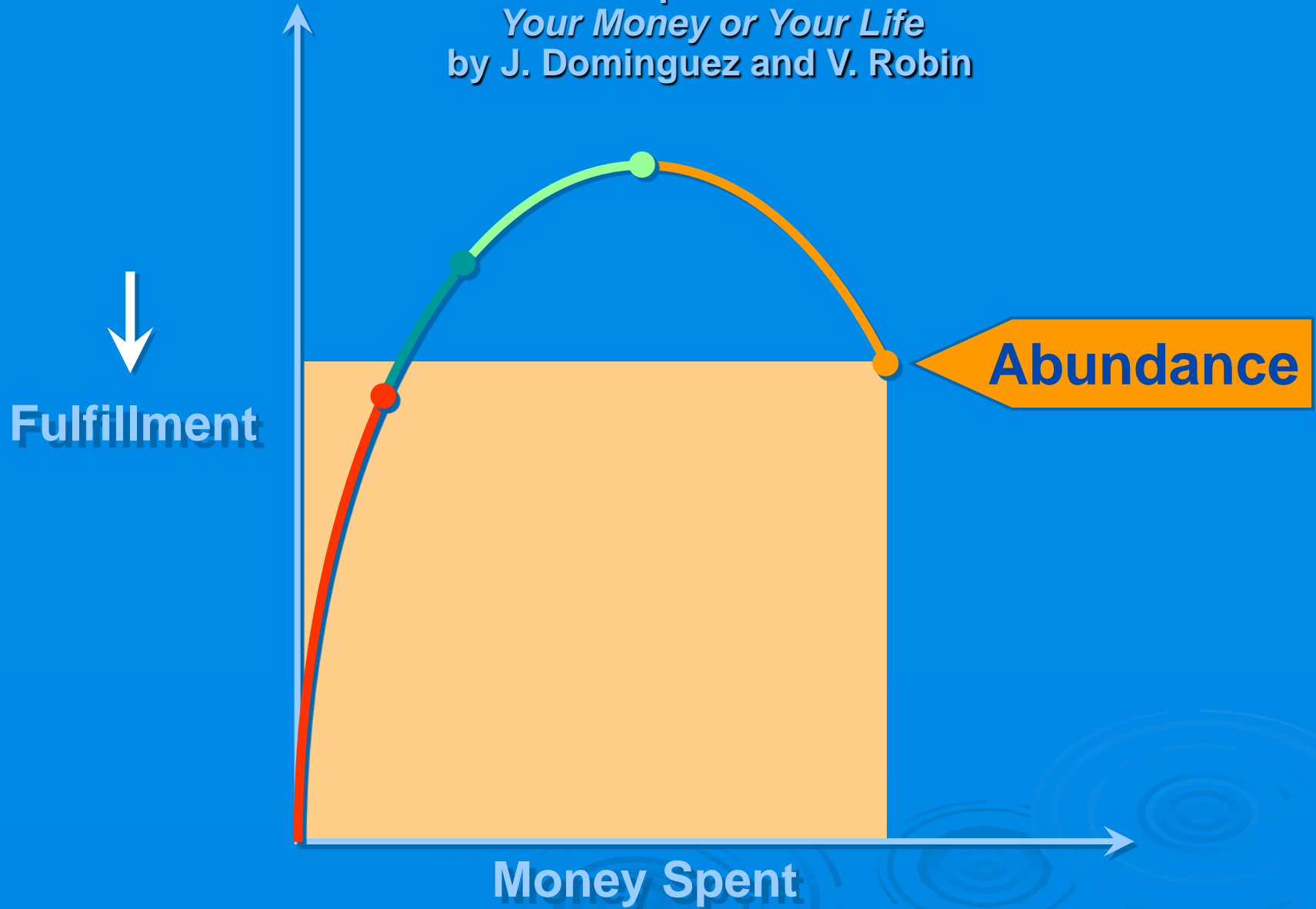


*Examining the quality
of our wants*



Fulfillment Curve

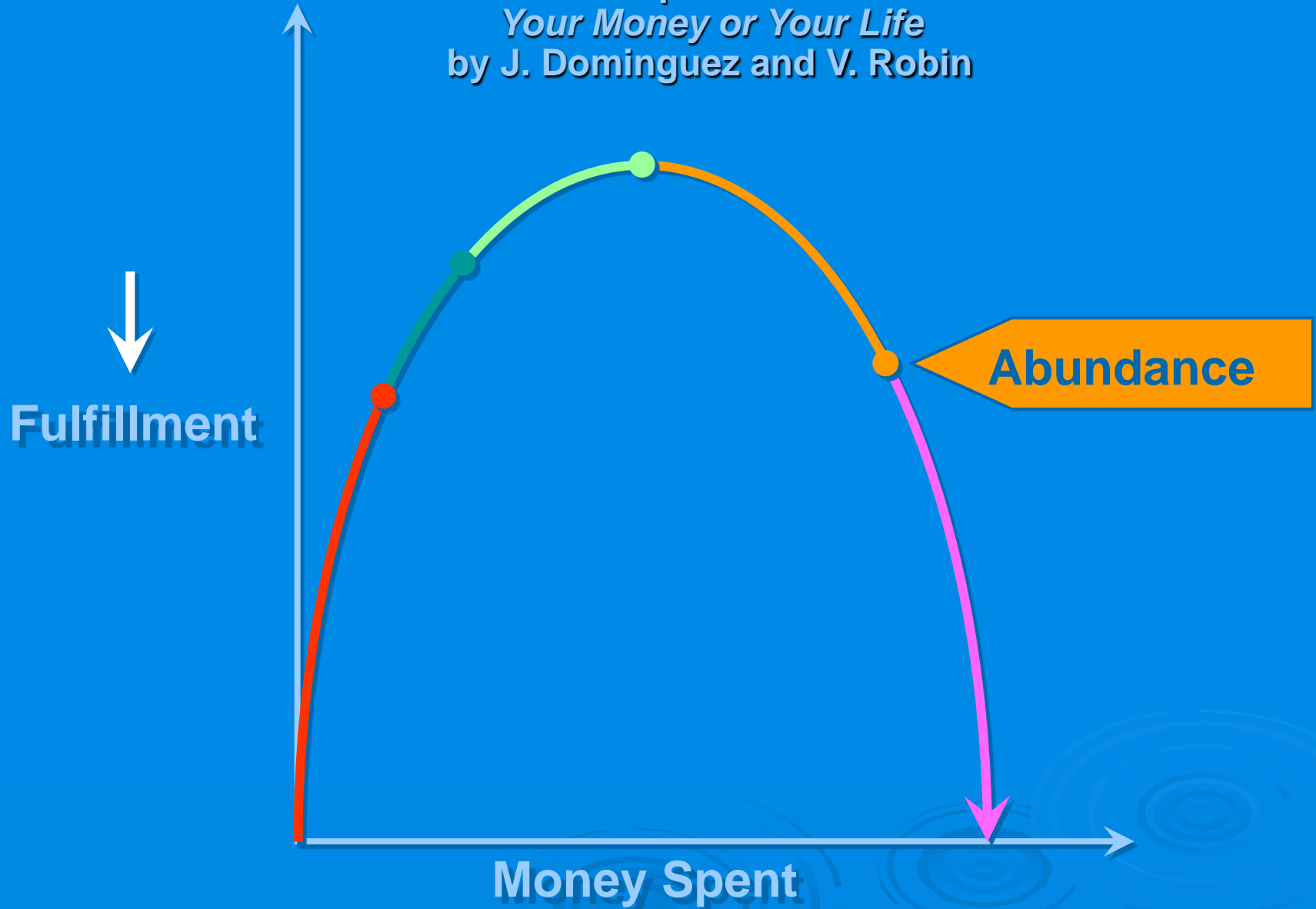
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*The more one has,
the more one wants*

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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



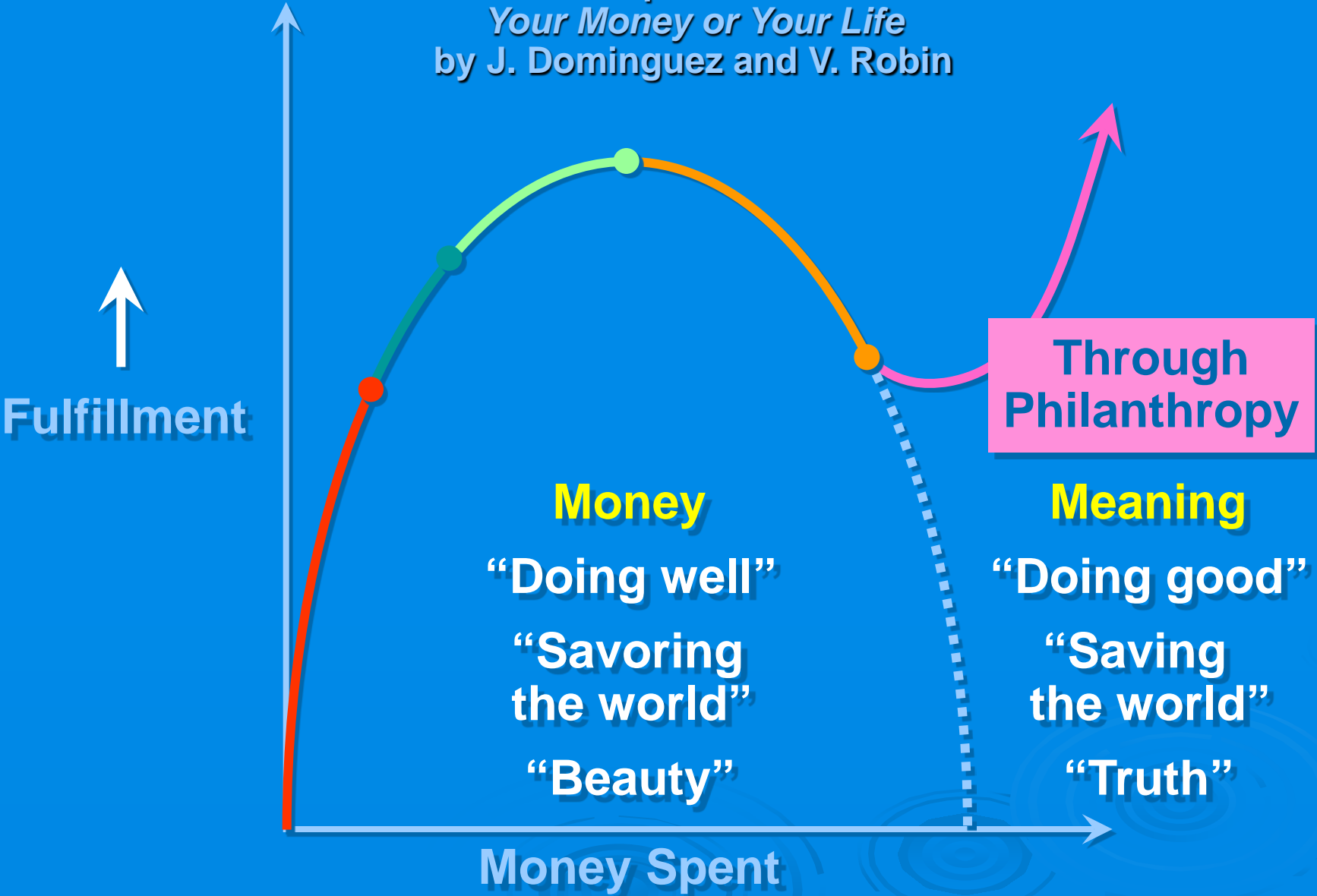
Ultimate Fulfillment

*Spiritual concerns rise
in the value hierarchy*



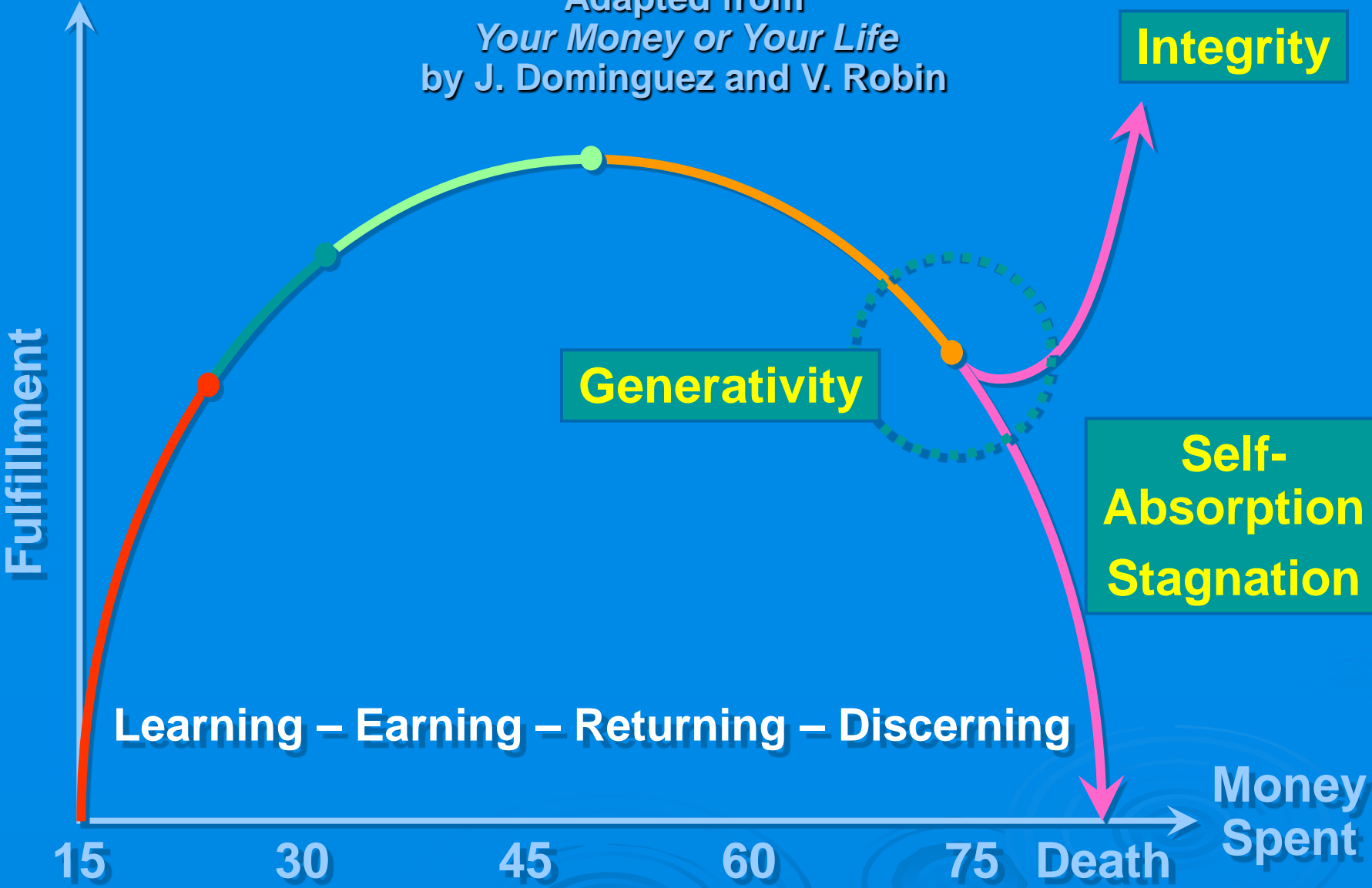
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It is how you spend your money and on whom that is important



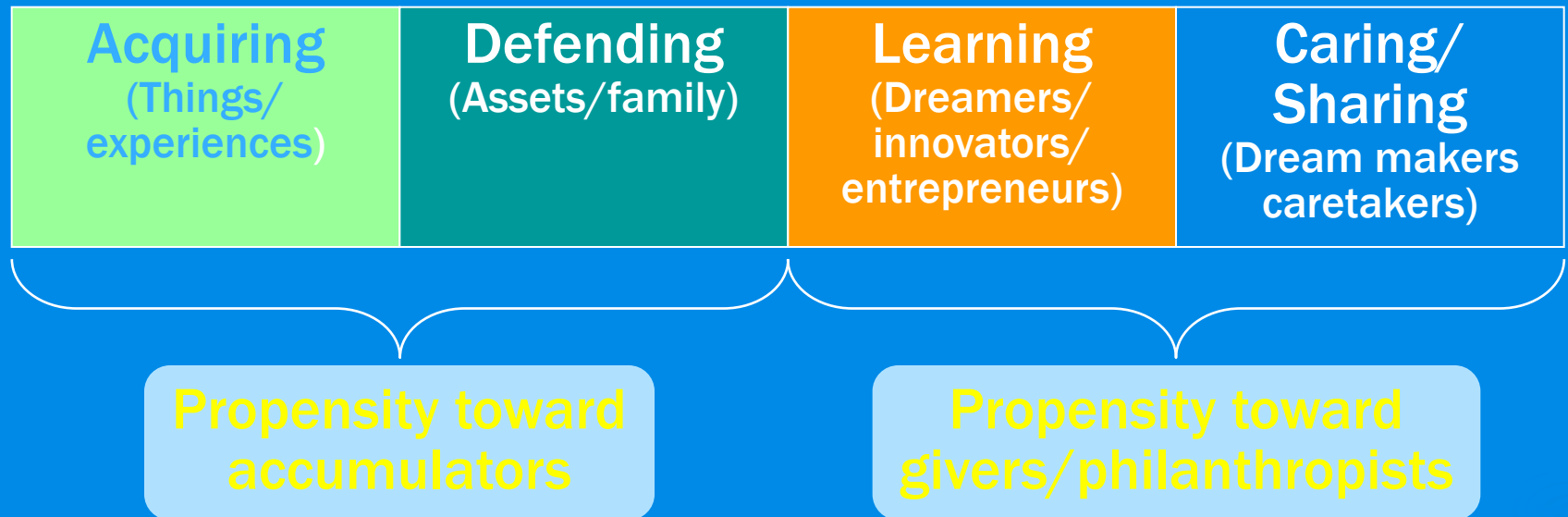
A focus on ideas and idealists



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 ...”



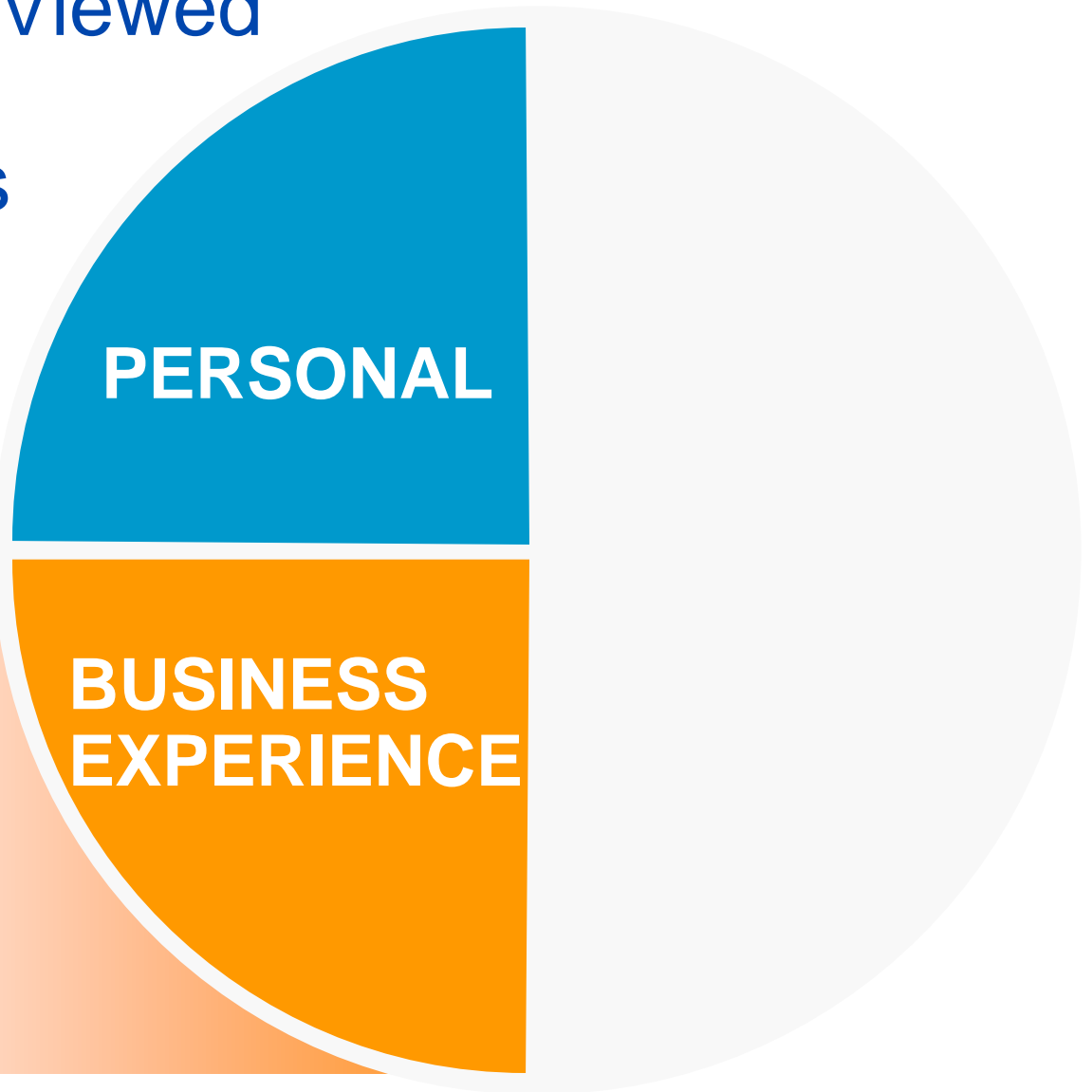
Resources as Viewed by Engaged Philanthropists

- Intellect
- Passion
- Time
- Talents



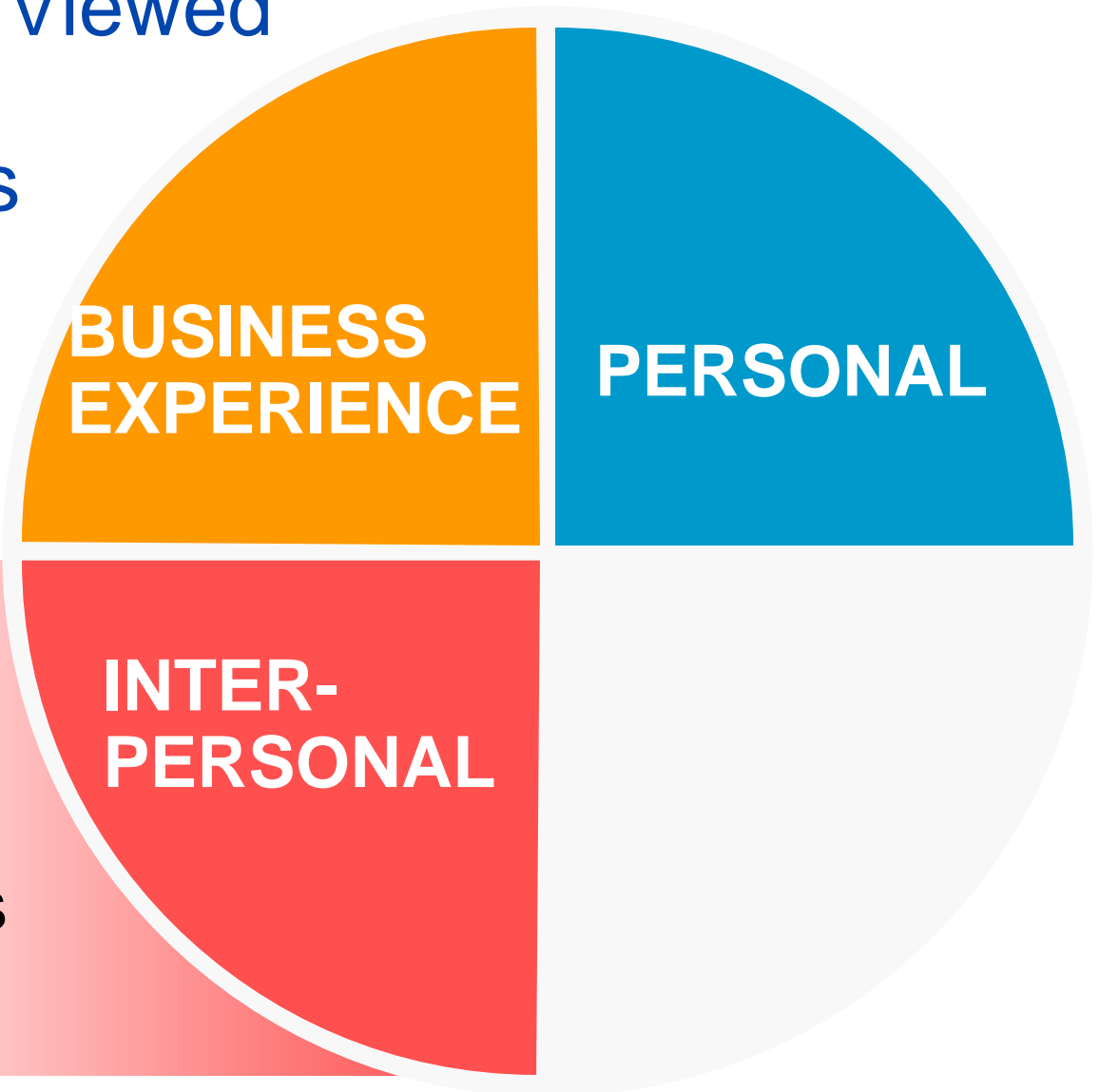
PERSONAL

Resources as Viewed by Engaged Philanthropists



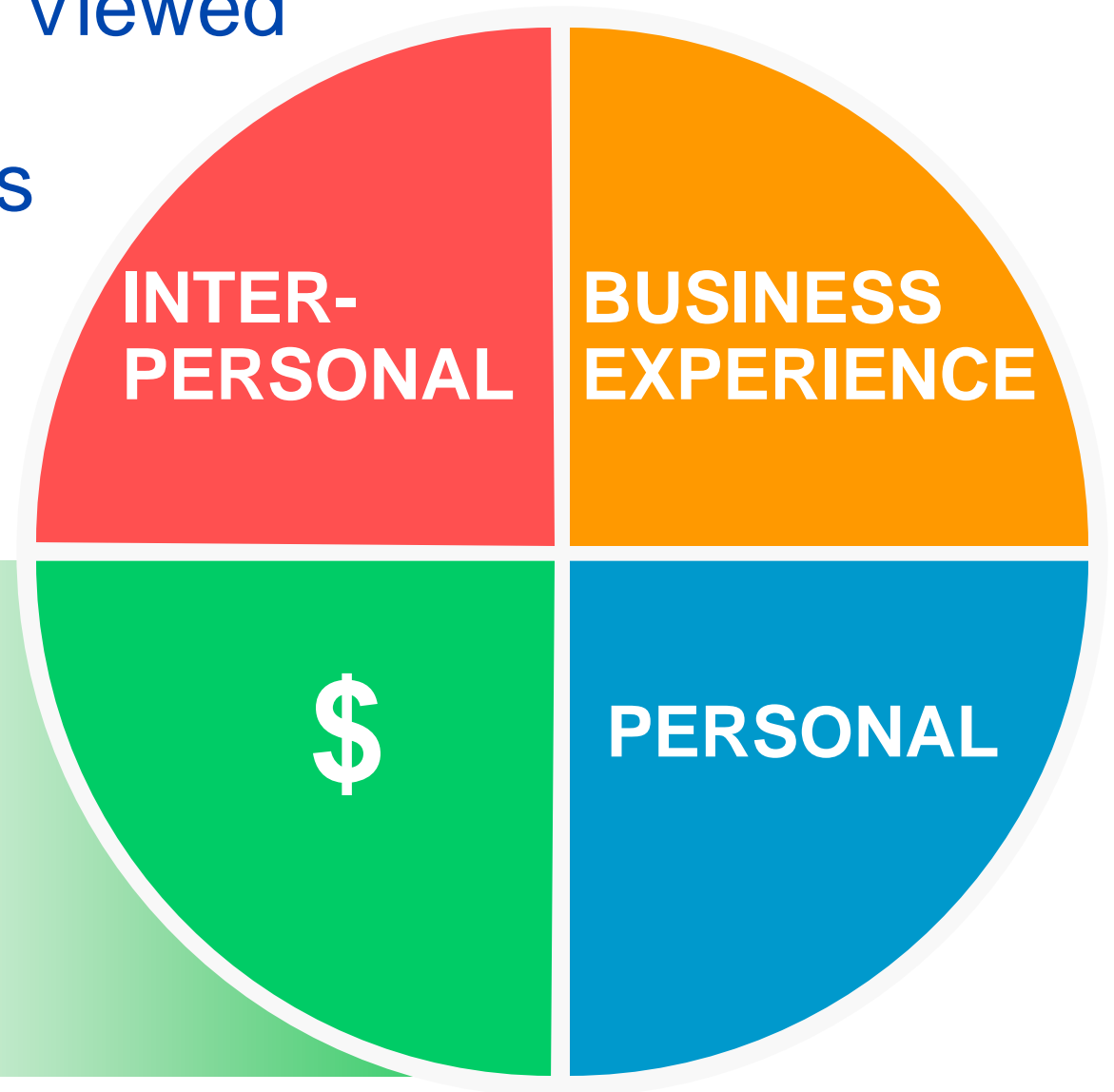
- Modeling
- Replicating
- Scaling

Resources as Viewed by Engaged Philanthropists



- Rolodex
- Connections
- Door openings

Resources as Viewed by Engaged Philanthropists



- Philanthropy
- Investments

What drives entrepreneurs crazy?

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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 ...

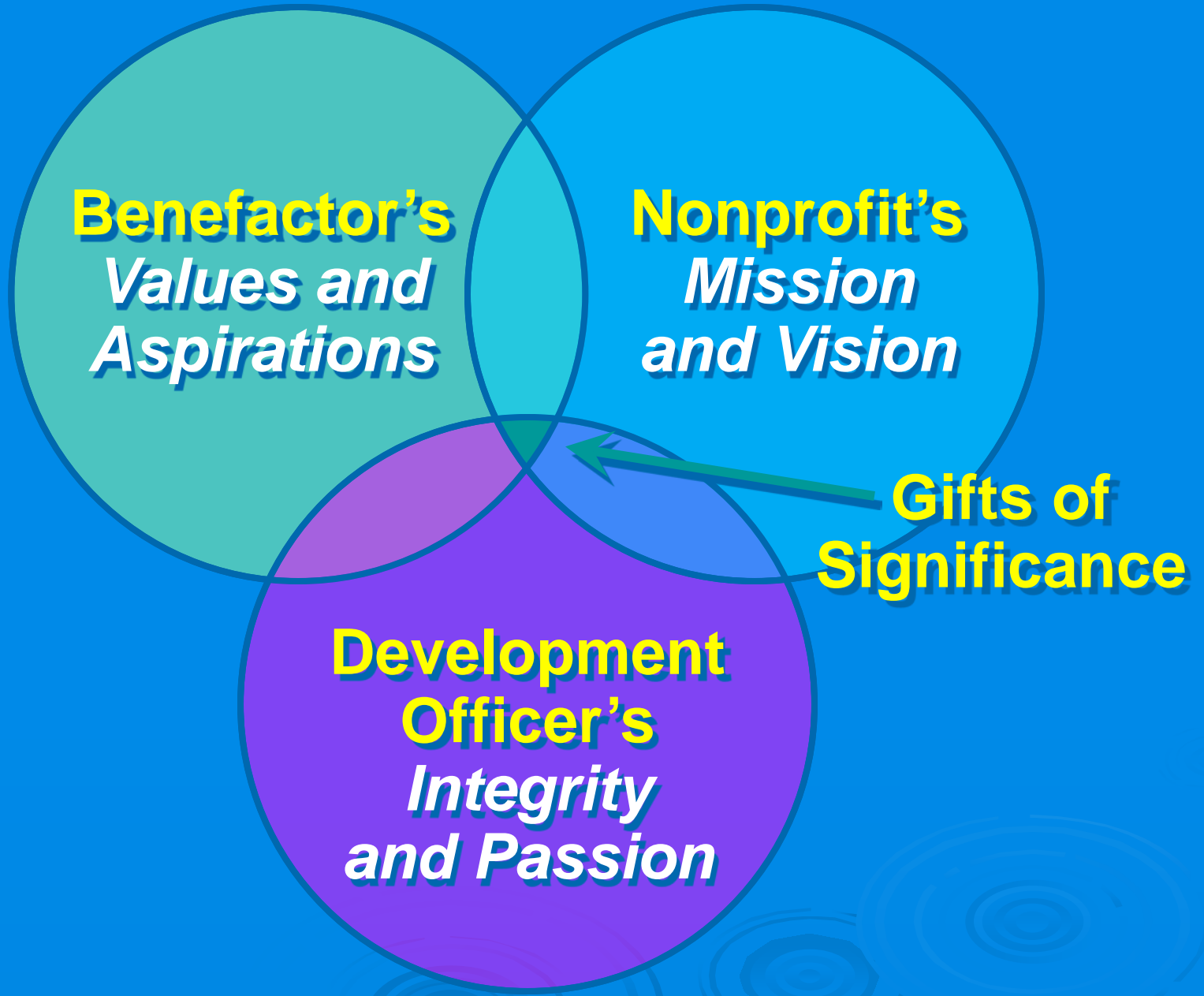


What are the sticky messages for Anshultz?



Who are your contagious messengers?





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

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

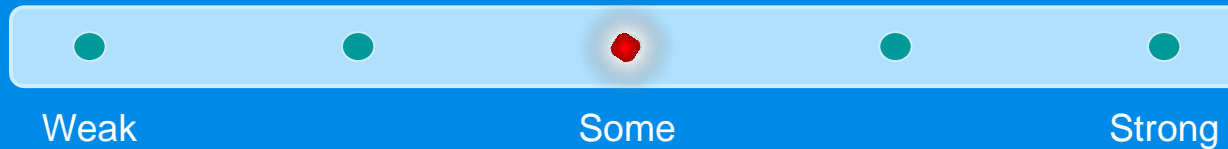


Relationship Quotient

What is the depth of their commitment
to your organization?



Benefactor Relationship with Nonprofit Organization

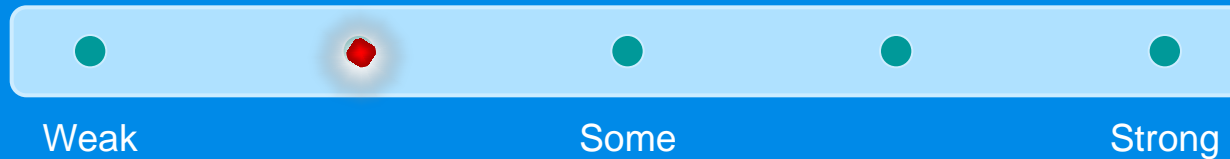


Relationship Equity

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

