Only Reflect: A Philanthropic Education for Our Time

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We are today on the brink of many changes in philanthropy. Thanks to a decade-long period of prosperity, there is more wealth in our nation than ever before. As a result, the philanthropic landscape is dotted with new financial vehicles and a greater variety of mechanisms to encourage giving not only by the wealthiest among us but also by people of more ordinary means. Donor-advised funds, now a mainstay of community foundations and Jewish federations across the country, have multiplied, as have mutual fund companies which offer charitable gift funds to the public. Indeed, the competition among such companies has itself broadened and improved options for donors. In addition, givers may choose from a proliferating array of non-profit organizations and, thanks to the internet, information about these organizations is at their fingertips. Ours is in short a time of many givers, many causes, and many ways of connecting the one with the other.

As we survey the philanthropic landscape, we notice two prevalent ways in which people have responded to this world of choice: by turning to experts or professionals for guidance and assistance, and by turning to standard-setters and regulators to establish and enforce the rules of the enterprise.

The professionalism path is a logical extension of well-worn patterns. In certain areas of our lives, including health, legal arrangements, and finances, many of us have come to rely on expert advice and trust the judgments of professionals. Even if we are sometimes uncomfortable, puzzled, or frustrated in our dealings with doctors, lawyers, accountants, or financial planners, such reliance makes eminently good sense in dealing with matters that call for specialized knowledge. The world is too complex for the "Renaissance man," much less the ordinary man (or woman), to navigate without expert assistance. As the slogan of a local law firm warns: "It's a complex world, be advised."

In money matters, as in much else, we have become used to seeking and relying upon expert advice. Giving is no exception. It is now commonplace for individuals or families to seek advice (and sooner rather than later) on estate planning from an accountant or lawyer and to incorporate decisions about giving into their larger financial plan. In response, increasing numbers of financial planners and institutions are expanding services to include advice about giving. A growing cadre of "philanthropic advisors" has hung out shingles to offer professional advice about giving.

Seeking professional advice is a natural and reasonable response to the proliferation of options in charitable giving. Seeking accountability by setting standards and regulating practices is equally reasonable. Like claims of special expertise, the pursuit of accountability is not a recent innovation. For example, since its birth in 1918, the National Charities Information Bureau has been setting standards for charitable practice and assessing

(reprinted from <u>*The Perfect Gift: The Philanthropic Imagination in Poetry and Prose*</u>, ed. A. Kass, Indiana University Press, 2002)

adherence, in order to help donors make better choices. The public has come to count on its help, as well as the help of the Attorney Generals' Offices and the Charity Offices of their respective states, both of which assist donors and guard against fraud and abuse.

These two responses—professionalism and regulation—meet real and pressing needs in philanthropy today. Professional advisors help givers with the "how" of giving: they instruct us in how to manage our money wisely and conscientiously, so that it goes as far as possible. So too, the regulators: they help us with the "whom" of giving, by assessing the credibility of potential recipients.

But in our experience those who are interested in giving need something more. They hunger for help with the "why" and "wherefore" of giving. Why give to one cause, or institution, or individual rather than another? What are we hoping will happen as a result of our giving? What should we expect from those we help with our gifts?

As these questions suggest, decisions about giving entail more than a choice among donor-advised funds. Such decisions press us to say what we value and how we believe the world works. Set in motion, our gifts establish—and sometimes transform—our relationships to others in our world, not always in expected or pleasant ways. Giving well requires not just technique but reflection, not just expertise but wisdom.

But where can Americans turn for wisdom about giving? Here, money managers and charity watchdogs have little guidance to offer. Some of us may turn to religious traditions or family traditions as a source of wisdom. Yet on the whole, Americans are disinclined to rely on tradition. As Alexis de Tocqueville observed more than 150 years ago, because we Americans believe that no one person is better than another, we seek the reasons for things largely in ourselves, not in tradition, nor in the wisdom of singular individuals. "Not only does democracy make every man forget his ancestors, but it hides his descendants and separates his contemporaries from him; it throws him back forever upon himself alone, and threatens in the end to confine him entirely within the solitude of his own heart." The result, in our own time, is unprecedented freedom—and loneliness— especially when it comes to choosing how to give.

But, as Tocqueville also observed, Americans regularly associate with one another to achieve common goals, and we have as a consequence developed "a taste for giving and serving" that can counter the isolating tendencies of individualism. This "art of association" is evident in the proliferation of philanthropic organizations and causes mentioned earlier. Indeed, we Americans often congratulate ourselves on our gift for association, quoting Tocqueville as we go. We pay less attention to his equally perceptive observations about our moral loneliness. Both, however, make up the reality of American philanthropy. The result is bittersweet. In a world of many choices, we have few sources of guidance to help us make those choices wisely.

We also have few people with whom we can comfortably talk about our giving choices. As sociologist Robert Wuthnow has noted, talking about money is one of the great American taboos. Businesses routinely suppress salary information in order not to fuel anger or envy in the workplace; parents resist telling their children how much they earn, give or save in order to protect the children from worry or pride; friends avoid asking each other how much they earn or how much they spent on their house. When it comes to giving, this taboo gains new intensity, fueled by fears that others will judge us or, worse yet, try to manipulate us for their own purposes.

There may be good reasons for American taboos on talking about money. But the result, as Wuthnow suggests, is that we do not speak about money with one another in terms of our values (it is "only" economics, after all) and become increasingly isolated in our dealings with and feelings about money.

Ours is, in short, a time of *unprecedented freedom*—and *loneliness*—in choosing how to give. For all these reasons, today's givers need special help in reflecting on the choices available to them. They need access to wisdom about giving, and conversation partners with whom they can explore their questions in a candid and unpressured way. They need a philanthropic education for our time.

The hunger for education, as well as for expert advice, is evident in the variety of donor education efforts that have been cropping up in recent years. From programs to reach the newly wealthy in high-technology companies to efforts focused on farmers, small-business owners, members of minority groups, and young people, many of these efforts hope to encourage more effective giving. Many of these programs are close cousins to efforts to promote a more professional, or expert, approach to giving—stressing knowledge of the techniques by which to give or advocating a particular style of giving, such as so-called "strategic philanthropy" or "venture philanthropy."

Others, such as "giving circles" and study groups, are less prescriptive, aiming to open up conversations among peers about giving. They invite reflection on personal experience and allow givers to learn from friends, neighbors, and family members. Here, the aim is not to produce experts or professionals. It is rather to help ordinary individuals reflect on their giving in the company of others. Giving circles offer participants the company of their peers, and open up a space for conversation about giving in a world of dizzying choices. They allow us to articulate our beliefs, describe our experience, and hear the beliefs and experiences of others. But without additional resources, such activities may not go far enough. Like any support group, they rely heavily upon the collective wisdom of the participants, and they are therefore circumscribed by the inevitable limits of that wisdom.

For the last five years, we have been trying to develop a program that would provide the needed additional resources. We have been experimenting with a particular kind of philanthropic education called "civic reflection." Like giving circles, civic reflection acknowledges the desire of people to decide for themselves about giving as an aspect of the good life. Like giving circles, it invites attention to personal experience. But it also seeks to enlarge the circle of wisdom by connecting contemporary givers with larger traditions of understanding about giving and serving, through group reading and discussion of selected texts from literature, religion, and history.

Through a University of Chicago project called the Tocqueville Seminars and two successor efforts (the Project on Civic Reflection at Valparaiso University and the Art of Association Project of the Federation of State Humanities Councils), small groups of civic leaders have been meeting on a regular basis to discuss their questions about "the why and wherefore of giving," in light of selected readings, and with the aid of facilitators. Some examples of civic reflection activities include the following:

In Portland, Maine, staff and trustees of the Maine Community Foundation and state grantmakers' associations came together over a six month period in 1998-1999 to explore "Perspectives on Philanthropy," with special attention to New England traditions of giving. Readings included works by Andrew Carnegie, Sarah Orne Jewett, Moses Maimonides, and Michael Sandel. This seminar has given birth in turn to philanthropy seminars for foundation staff and individual givers in each of the New England states, coordinated by state humanities councils with support from the National Endowment for the Humanities.

In South Bend, Indiana, members of a voluntary association for women interested in philanthropy met in 1997-1998 to discuss "Generosity of Spirit and the American Tradition," with special attention to giving by American women. Readings included selections by Catherine Beecher, Ralph Waldo Emerson, Henri Nouwen, and Eudora Welty. When the seminar concluded, the group continued to meet to explore opportunities for giving and serving in South Bend.

In Fort Wayne, Indiana, civic leaders gathered for a seminar on "Giving in America: Tradition, Challenge and Choice." These leaders, all actively involved in giving through volunteering, fundraising, institutional development, foundation leadership, trusteeship, and individual giving, wanted an opportunity to explore fundamental questions, like: What does it mean to give well? How can we give more effectively? How can we encourage others to give? Participants discussed these questions in light of short texts by writers such as Alexis de Tocqueville, Robert Wuthnow, and Jane Addams. They also created their own "giving autobiography" and drafted a giving plan for personal use. This seminar, too, spawned several other study circles, including an inter-generational effort that brought together parents and children of several families for reading and conversation about giving.

These seminars vary in certain respects. Some have been supported by foundation dollars, others by participant subscriptions. They may meet in a church basement or a country club, a living room or a health center. They differ widely in the type, length and density of the assigned readings (although, as a general rule, readings have gotten shorter with each successive seminar). They are facilitated variously by historians, college instructors, foundation executives, and adult educators.

Notwithstanding these minor differences, civic reflection seminars share five essential features: First, they are for civic leaders—men and women who are actively engaged in giving and serving. These conversations are *not* designed to engage the disengaged. Instead, civic reflection seminars are designed to offer the many men and women who are *already engaged* in civic life a rare opportunity to understand and deepen their giving and service.

Second, they offer these leaders opportunities for candid conversation with peers, unconstrained by the prospect of a pledge card marking the conclusion of the process. Donors and other civic leaders seldom have unpressured space for conversation where they are neither "targets" nor "prospects" but people with convictions, experiences and questions of their own.

Civic reflection seminars provide these leaders with an opportunity to talk with one another candidly about the challenges, choices, questions, and doubts arising out of their philanthropy. These seminars are not lectures or "visits with a prospective donor" but facilitated conversations.

Third, these seminars start with the participants' own questions about giving. Some of the most troubling questions civic leaders encounter in their work are enduring human questions—questions not unique to one organization or profession, time or place, but arising in a variety of times, places, and circumstances—questions like, What is a good gift? Who is my neighbor? What should we expect from those we serve? Seminar facilitators listen carefully to participants and help them articulate the fundamental human questions that arise naturally out of their giving activity. Indeed, in our experience, one of the greatest gifts of these occasions is the gift of one's own questions—and the discovery that those questions have been asked by other persons in other times and places.

Fourth, participants read and discuss texts with other givers. Starting from participants' questions, facilitators assign readings that address their questions in an accessible yet thought-provoking way. In our experience, the use of readings is important for two reasons, one substantive and the other practical. Substantively, texts enlarge understanding and deepen imagination, connecting participants with larger traditions of thought and imagination and other times and places. But readings have practical benefits as well for enhancing discussion. They provide a fresh and shared point of reference for participants, and so help to move the conversation beyond personal experience and hardened opinion. There is no set canon of readings for philanthropic education. All sorts of texts, from classic works of literature or philosophy to movies and children's books have been found useful. The key to successful reflection seems to be less the nature of the text itself and more the asking of interesting and personally important questions about the texts.

Finally, civic reflection seminars include opportunities for civic leaders to look back on how they learned to give and to perceive and describe their own familial, religious and regional traditions of giving. For instance, facilitators might ask participants to write down their earliest impressions of service to others. Or they might invite philanthropists to fill out a giving autobiography or timeline, plotting key memories and experiences that have shaped (for better or worse) their ideas about giving, and then to reflect upon striking patterns or themes. These exercises have proven useful in starting group conversation about individual values and larger traditions of giving, and in helping participants think about how they can in turn teach others to give.

Though the number of these seminars continues to multiply, we are well aware that they are only a start, a small start at an attempt to deepen the thoughtfulness and commitment of those who already give. The volume to which this article has been donated invites many more givers, now unknown to us, to participate in civic reflection. Indeed, you, the readers of *The Perfect Gift*, are perhaps in the best of all possible positions to bear witness to the merits of such an education. Have any of the readings helped to enlighten, deepen, or possibly even to change the way in which you now think about your own philanthropic deeds and intentions? Has your own willingness to "reflect, only reflect," improved your philanthropic understanding and encouraged your philanthropic intentions? We hope so.