Right Being, Wise Action…In Community

GHC *Conversation 2014* Synopsis

April 2 – 4, 2014

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INTRODUCTION AND FRAMEWORK

Our sixth *Conversation* returned to Hilton Head Island, South Carolina and was held April 2 - 4, 2014. Through the course of these *Conversations*, we have created and nurtured something special—a time when busy individual leaders/professionals in the social sector voluntarily step off the treadmill to weave ourselves into a reflective community of practitioners, intent on sharing wisdom and finding new meaning for our important work and our collective contributions.

As in all prior years, the organizing intention of this *Conversation* is to create a clearing, an opening, and an invitation to test assumptions and to welcome some level of personal disturbance…so as to see with new eyes the things we think we know well—the social sector and philanthropy. It is a platform for a robust exchange among like-spirited colleagues in search of new meaning.

Conversation 2014 is an intentional pursuit of clarifying the balance or alignment of three things (at least)….1) our dream of the world we want; 2) the contributory impact we want our organization(s) to have; and 3) our own personal dreams, goals, and aspirations. It is a space to explore our right relation to the world and to our work. Evident throughout our discussion is a bias to take the long view and to recognize that everything we need is here right now.

Our focus on "right being" and "wise action in community" is intentional. Our previous five *Conversations* are scaffolding for this discussion. We believe we are developing a network of practitioners with a shared point of view about disturbing the system toward equity, justice, peace, and love.

- *Conversation 2009* examined four key elements: new leadership perspectives; understanding systems; interpreting impact; the future of philanthropy.
- *Conversation 2010* found us stuck in a mandorla, seeking new paths through to a future that, at the time, was clouded and uncertain. We felt loose from our moorings.
- *Conversation 2011* sought to learn from the future, to open our minds to new ways of seeing and, therefore, to realign our <u>in</u>tention and our <u>at</u>tention.
- *Conversation 2012* went further in this direction, embracing scenario thinking to imagine distinct images of possibility for the social sector and philanthropy in 2030.
- And *Conversation 2013* adopted a systems lens to explore resilience for the social sector and what individual intentional practice might look and feel like.

So *Conversation 2014* picks up where 2013 left off. Our exploration of right being and wise action in community blends individual and organizational perspectives on leadership and responsibility. The framework for this discussion is around concerted action toward addressing "wicked problems"—those social or cultural problems that seem intractable.

Individually, our reflections are often wrapped around some common questions: How will I *be*? What is my *work*? What will *adaptive* leadership look like? *Why* act in concerted action

anyway? We wanted to move beyond the HBR/SSIR relevant article of the month. We trust and honor that the work is bigger than what the language of *collective impact* conjures in our minds. We believe right being and wise action in community has a lot to do with our relationship to the issue and our relationship to our stated intention.

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Conversation 2014 Agenda
Right Being…Wise Action…In Community

Wednesday, April 2, 2014

FOCUS: Building community, trust, and momentum; breathing in and positioning us for deeper listening and engagement; being reminded that part of right being and wise action is letting go, which is the necessary precursor to letting innovation, creativity, and collective action come; connecting threads of past *Conversations* to inform our perspectives on this year's topic.

Opening Lunch

Framing Our Conversation
- *Conversation* introduction
- Review, reflection, and interpretation of *Conversations 2009 - 2013* as scaffolding for *2014*
- Overview of *Conversation 2014* agenda/approach

Participant and Essay Introductions
- *Brief self-introductions*
- *Assigned partners briefly summarize the core elements of one peer essay/creative contribution*

Adjourn to Opening Reception & Dinner

FOCUS: Building upon the questions and insights of advance creative contributions, we take the concept of "collective action" out of the theoretic and examine it through the lens of the perceived possibilities and real barriers. Have/How have the advance essays opened you to new dimensions of this topic? The discussion seeks to leverage our collective experiences in this practice field.

What Do We Want in This World?

1. What questions must we ask ourselves to make this conversation optimally meaningful and contributory to what you want most in this world?

2. Is/How is your organization a vehicle for your dreams, goals, and aspirations—in other words, a vehicle for the kind of world you want?

3. Ostensibly, each social sector organization seeks to remedy a social problem. What is really being asked of us in trying to solve wicked problems?

4. Aspiring to wise action in community is akin to motherhood and apple pie—who would argue against it? Yet, how do we empower, learn, adjust, and improvise to create something meaningful and lasting for people beyond those in the first row?

5. What has to happen systemically to foster a way for more people to get a real toe-hold in life?

Shared Mental Models

6. As you watch the nonprofit sector address big, tough social challenges, what seems to be the sector's predominant "theory in use"? What are the seemingly shared, unspoken assumptions about the way the world works?

7. How do we get beyond the natural tendency of systems to calcify and stand in the way? How can we dissolve the natural tensions?

8. How can we amplify the successes to get past discouragement and the complexity?

Barrier Removal/Leveraging Assets

9. Why is collective action a much more difficult action for organizations? What are the vital characteristics of effective collaboration and how can they become the norm rather than the exception?

10. If collective action is a way of characterizing an ideal approach to wicked problems, what's the wicked problem embedded in collective action?

11. We can push beyond the faddish treatment of "collective action/impact" in the literature to have an honest examination of the myopic trap of "organizational excellence." What needs to happen?

12. What would cause *more* organizations to pursue concerted action, meaning fewer remain focused on their own objectives?

13. Beyond the models of collective action, how do real people beyond the organizational partners adapt this to their lives?

Wise Action, Long Lens, and an Inner Light

▪ Build on the morning discussion to examine right being and wise action in community in alternative futures. What happens to the pursuit of collective impact in each of our four 2030 scenarios?

▪ What's my personal learning journey if I'm to take responsibility for this work?

Anticipating Friday's Discussion & Closing Comment

FOCUS: Harness the energy of the prior day and apply that energy and creativity to one's own inner right being/adaptive leadership work; tap the wisdom of the group to add dimension to personal observations; an expansive day, spent largely outside the main meeting room.

Overnight Musings

- Hubbells initiate the discussion by sharing some impressions and framing of yesterday's discussion. Primes the pump for going deeper

Personal Leadership Reflection Time

- Hubbells provide framework for this section
- Reflect on key questions to prime your thinking:
  - If wise action in my organization and/or my community and/or my subsector begins with me, what must my "work" be?
  - What is my right being learning agenda?
  - What must I practice in order to model personal mastery and adaptive leadership?
  - How will I integrate adaptive skills and culture building?
  - Where is my joy in this?

Peer Coaching

- Hubbells briefly frame the session format and form peer coaching teams
  - In group, each person quickly shares some of their individual reflections on right being/adaptive leadership "mastery practice."
  - Teams look for shared learning themes/big insights/deeper discussion.
  - Identify the group's emerging wisdom and prepare a brief summary to the full group.

Wisdom Sharing

- Each group presents their collective wisdom to the full group
- Discussion/interpretation
- Implications for tomorrow's discussion

Anticipating Saturday's Discussion & Closing Comments

FOCUS: Sense-making session that is the capstone of the entire *Conversation* and our contribution to the sector; leveraging the "soak" time we've had with these issues; finding the new and important intersections among the ideas; pushing ourselves—and one another—to go even deeper in pushing past
our long-held assumptions and constructs.

Collective Sense-Making: What Have We Learned about Right Being…Wise Action…In Community?

- What if? <u>What's emerging here for you</u>?
- What do we believe are the ways forward for <u>practice, tools, policies</u>, etc.?
- What does the <u>"practice field" for philanthropy</u> look like?
- <u>What can we do for the social sector</u> (aka, community benefit, nonprofit)? Can/How can we lead the sector through these times in the areas we care the most about?
- How would <u>networks</u> (like GHC *Conversations*) make more impact?

Looking Ahead to *Conversation 2015* and Closing Comments

- Format changes
- Group composition
- Advance thinking/writing
- What should *Conversation 2015* address?

Conversation 2014 Adjourns

Synopsis prepared by Gary Hubbell, with deep appreciation
to the participating women and men who brought
wisdom, experience, trust, and soul
to *Conversation 2014*

SCAFFOLDING FOR OUR DISCUSSION

As in years past, each participant was asked to write and submit a thoughtful essay on this year's topic. These essays seed our discussion and prompt each of us in advance to challenge our assumptions. In addition to the compiled essays, participants were asked to read some relevant pieces prior to arrival. They are:

1. *Wicked Problems* – This short piece defines and describes what some call "wicked problems" (poverty, injustice, hunger, etc.). It also includes the text from a recent SSIR article, which does a great job of framing the conversation we wanted to have about how to dive into the issue of "wise action in community."

2. *The Social Sector and Philanthropy in 2030* – this is the brief distillation of a much longer and detailed product of *Conversation 2012*, where we developed four plausible stories of possible futures in 2030. This piece is intended to help frame our discussion about imagining, and preparing for, possible futures.

3. Otto Scharmer's pivotal book, *Theory U: Leading from the Future as It Emerges*, is groundbreaking. We included a two page summary of key points that we feel helps us explore the path toward <u>real</u> concerted action.

4. Finally, Dean Robb's *Building Resilient Organizations* – Our dedicated time for reflective individual work uses some of Robb's framework. This is a brief, yet powerful perspective for individuals and organizations.

Our introductions of one another's advance essays and story contributions become an organizing construct to initiate our discussion. The essential threads of the story we are telling about pursuing right being and wise action in community are evident in our collective creative contributions and come to life the following graphic.
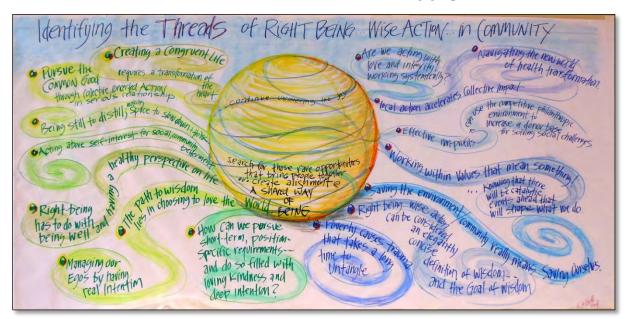

Illustration by Ken Hubbell

Working alone through our individual reflections, our advance contributions lead us to see that right being and wise action in community requires:

- Appreciation of its elegantly concise definition of wisdom—and the goal of wisdom;

- Acknowledging the path to wisdom lies in choosing to love the world;

- Acting with love and integrity and working systemically;

- A transformation of the heart in order to create a congruent life as a leader;

- Being still to distill and making time to slow down and think;

- Being well and having a healthy perspective on life;

- Managing our egos by having authentic intention;

- Pursuing the common good through collective/concerted action in serious relationships;

- Acting above self-interest for the social/community betterment;

- Pursuing short-term, position-specific requirements filled with loving kindness and deep intention;

- Working within values that mean something, confident in the knowledge that there will be catalytic events ahead that will shape what we do;

- Leveraging local action to accelerate collective impact. For example, we're currently navigating a transformation of health and healthcare. Effective nonprofits can use the competitive philanthropic environment to increase a donor base for resolving social challenges;

- Understanding that saving the environment/community really means saving ourselves; and

- Realizing that poverty causes trauma that takes a long time to untangle, resulting in one's need to sort through all kinds of problems and challenges in order to create some alignment around a shared way of being in service of this work.

AUTHENTIC ADAPTIVE LEADERSHIP

To Kevin Cashman's definition of leadership[1]: "authentic self-expression that adds value," we believe it's appropriate to add "in community." In our view, leadership is the authentic and collective work to close the gap between our vision and today's reality. In the decades ahead, social change and philanthropy's possibilities will be less about tools and techniques and more about leaders' curiosity, authenticity, courage, and alignment.

Leadership—and life—is a conversation every individual is constantly having with others; a live encounter with community, nature—with reality—as we move through life. It takes personal mastery, courage, practice, humility, and a supportive, reciprocal relationship

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[1] K. Cashman, *Leadership from the Inside Out: Becoming a Leader for Life* (San Francisco: Berrett-Koehler Publishers, Inc, 2008), 24.

with our environment to make in our world the profound changes about which we care most deeply.

In the leadership journey, we are:

- Learning how to "be" and become our greatest selves so we can make a useful and lasting contribution to the community.

- Learning the right action for every challenge so we unleash the greatest potential for good.

- Learning how to see and to think with others so we can get done more of what matters most.

- Learning how to take full responsibility for our dreams and everyday choices so we can first add value and work in relationship, which fosters trust, the accomplishment of big things, and a life worth living.

So what if we stood up for what we're putting forward at this *Conversation*? What if we change the question we're bringing to the table? The question of who leads comes back to <u>me</u>. But common speech belies our unconscious blocks and barriers: "in reality"; "the reality is…"; "get real." If we all agree that there is no reality—only the perception of reality—why do we daily "accept reality" as a set of barriers to better action? "Reality" is what we make it. I have a choice every day. What is my perception today? What assumptions am I making? What if I don't succumb to the timid response that I'm simply being idealistic? What if I courageously persevere, asking people to indulge me five minutes more? What if two of us did this? Five of us? What openings would emerge? This stance is not idealistic; it is courageous.

> *"We've frozen things and acquiesced to the way things are today (e.g., the acceptance of unemployment levels, the prevalence of poverty, racial discrimination, et al.). We don't dream enough about what we want our world and our communities to look like. There's a generative power to dreaming that leads to collective action. Appreciative inquiry is a tool in service of this generative power."*
>
> *Kim Scott*

Isn't our responsibility and the frame for our daily choices some balance of three spheres of accountability? [2]

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[2] Community Wealth Partners, 2013. "Where to Start: Setting a Bold Goal?" http://communitywealth.com/social-transformation-resources/ . This available resource was referenced in an insightful article in Stanford Science Innovation Review, Fall 2013, http://www.ssireview.org/articles/entry/when_good_is_not_good_enough

(Outcomes, though achieved by others, we are concerned and consulted about.)

(Outcomes we influence through partnerships, advocacy, or through thought leadership.)

(We feel directly responsible for these outcomes.)

Who will lead? What are we willing to do differently together? The individual response requires a different type of leadership. The question comes down to whether each of us takes personal responsibility to lead—recognizing that the best solution may not involve me. We conclude that the only toehold forward is through our <u>own personal posture of what we'll stand up for wherever we are</u>. Each of us has the daily choice of being an agent of change from within. Am I willing to act courageously enough to align with what I say is my highest and best self? Am I strong enough to take the high road?

The real conversation of concerted action begins with enlisting yourself into courageous action. John Swanholm—recalling recent experiences in navigating transformational changes in his healthcare environment—said he had previously assumed that there were some really bright people already working on these transformation ideas. Ultimately he concludes: "There's a leadership gap and someone has to step up. That might be me." This story reminds us of a powerful poem.

IT IS I WHO MUST BEGIN

It is I who must begin,
Once I begin, once I try—
here and now,
right where I am,
not excusing myself
by saying that things
would be easier elsewhere,
without grand speeches and
ostentatious gestures,
but all the more persistently
—to live in harmony
with the "voice of Being," as I

understand it within myself

—as soon as I begin that,

I suddenly discover,

to my surprise, that

I am neither the only one,

nor the first,

nor the most important one

to have set out upon the road.

Whether all is really lost

or not depends entirely on

whether or not I am lost.

(Vaclav Havel)

FRAMING WISE ACTION IN ORGANIZATIONS

Leading scholars of profound change affirm that the authentic adaptive leadership challenge is both an individual and a collective (or organizational) one.[3]

> "Contemporary theories of change [seem], paradoxically, neither narrow enough nor broad enough. The changes in which we will be called upon to participate in the future will be both deeply personal and inherently systemic. Yet, the deeper dimensions of transformational change represent a largely unexplored territory both in current management research and in our understanding of leadership in general. [T]his blind spot concerns not the what and how—not what leaders do and how they do it—but the who: who we are and the inner place or source from which we operate, both individually and collectively."

Many of us work in and/or closely with big organizations, so we are one individual leader among many. Therefore, it is a natural extension of this dialogue to explore how organizations lean—alone and collaboratively—into wicked problems. Our discussion of leadership, organizations, and concerted action notes a slippery slope away from authenticity when we examine the notion of leadership in big, lasting change undertakings. Some of us observe that social change initiatives can become closely associated with individual and organizational leaders who are sought out and rewarded (with recognition, resources, access, etc.), especially in North America. In those cases, too often the focus shifts from the wicked problem to the "face" of the issue and the tools employed.

When looking historically for wicked problems that have been successfully addressed, we find several that come immediately to mind. Among them are reduced smoking rates in the

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[3] P. Senge, C.O. Scharmer, J. Jaworski, and B.S. Flowers, *Presence: Exploring Profound Change in People, Organizations, and Society* (New York: Currency Doubleday, 2004), 3.

U.S., improved status of women in North America, and the eradication of some infectious diseases. What can we learn from these successes about how best to address other wicked problems? Is there a common denominator? Perhaps it's the length of time over which they were pursued with multiple leaders over several generations.

More recently, the Strive model (Cincinnati) and Portland's Cradle to Career are contemporary examples of concerted action. Kania and Kramer[4], who studied and wrote much about the Strive model, believe there are five conditions that have to be present to bring about large scale change through collective impact.

Collective Impact: Overview	FSG.ORG

Achieving Large-Scale Change through Collective Impact Involves Five Key Conditions For Shared Success

Common Agenda	All participants have a **shared vision for change** including a common understanding of the problem and a joint approach to solving it through agreed upon actions
Shared Measurement	**Collecting data and measuring results consistently** across all participants ensures efforts remain aligned and participants hold each other accountable
Mutually Reinforcing Activities	Participant activities must be **differentiated while still being coordinated** through a mutually reinforcing plan of action
Continuous Communication	**Consistent and open communication** is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation
Backbone Support	Creating and managing collective impact requires a separate organization(s) with staff and a specific set of skills to **serve as the backbone for the entire initiative and coordinate participating organizations and agencies**

Source: FSG SSIR Collective Impact Article, Winter 2011; FSG Interviews   7   © 2011 FSG
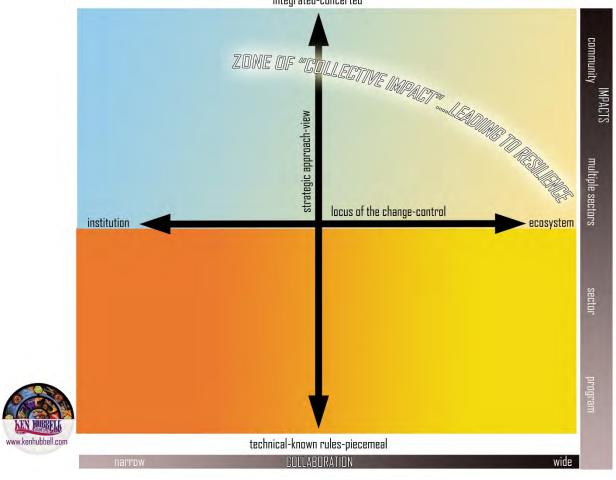
Yet these noted conditions still leave us with questions. Who leads in the pursuit of solutions to wicked problems and what do our defaults and organizational behavior tell us and others about our leadership challenges? By becoming more adaptive, organizations have the best chance of catalyzing lasting impact on tough social and community issues. In his Adaptive Leadership Challenge chart below Ken Hubbell helps us visualize the challenge individuals and organizations face in moving beyond that which we know best and think we control. The adaptive leadership challenge is framed by the intersection of two variables, each on a continuum, and both of which reflect dominant organizational points of view and, often, unvoiced assumptions that reflect organizational culture. The first is our organizational view or strategic approach to impact—from the more limited

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[4] J. Kania, and M. Kramer, "Collective Impact," Stanford Social Innovation Review (2011): http://www.ssireview.org/articles/entry/collective_impact/

(piecemeal, technical response-oriented, steeped in the "known rules") to the more expansive (visionary, integrated, concerted, and adaptive). The second variable is the locus of the change/source of control and, therefore, the posture toward collaboration—from the narrower institution-centric to the wider whole ecosystem.

THE ADAPTIVE LEADERSHIP CHALLENGE Making a more lasting impact on persistent challenges

We observe that many organizations who claim to aspire to collaboration in pursuit of wicked problems fail to realize that they are operating from a narrower, technical, piecemeal pattern (lower left, orange quadrant). Having the ability to be optimally successful in solving wicked problems requires most of us to shift our individual attitudes and organizational behavior toward the upper right quadrant, which Ken labels the zone of collective impact, leading to resilience and lasting change. Important as it is, this shift gets little attention.

Navigating the path to wise action in community inevitably lifts up a common tension. Often our mental individual and shared organizational models are largely unconscious and often in the way of innovation. These mental models and our resulting behaviors are deeply ingrained, often setting us up unconsciously to tackle problems out of old default

positions—where we can control the direction, pace, and scope of change. Even the funders of social change can unintentionally create barriers to real change in their constructed metrics, reporting requirements, and artificial timelines—all part of their default positions.

Problem solving approaches are generally based in logic, yet we may be blind to the unspoken assumptions we're making about the issues and our environment. In the chart above, we simply move from the orange toward the yellow quadrant, reflecting that we're intentionally pursuing a more whole system view but attempting to do so in our known and familiar patterns of thought and control. This is insufficient to the bigger shift desired in true concerted action.

How can we expect to engage others in pursuing a big and lasting impact if we are unaware or divided in our understanding of the prevailing assumptions we're making and the mental model in place? We believe that mental models are very important to this, or any other, discussion of right being, wise action in community. Daniel Kim helps us recognize that mental models can be the source of great barriers to collective action or they can be the source of great leverage in whole systems thinking. He developed a vision deployment matrix as a structured problem-solving tool and, more important to this conversation, as a means to imagine the postures necessary to produce change.

<p align="center">VISION DEPLOYMENT MATRIX[5]</p>

	Level of Perspective (Action Mode)	Current Reality		Desired Future Reality
L E V E R R A G E I N C R A S E S >>>>>>>>	**Vision** (Generative Action)	What is the current vision-in-use?		What is the espoused vision of the future?
	Mental Models / Prevailing Assumptions (Reflective Action)	What are the prevailing assumptions, beliefs, and values that sustain the systemic structures?		What assumptions, beliefs, and values are needed to realize the vision?
	Systemic Structures (Policies/Procedures) (Adaptive Action)	Which systemic structure are producing the most dominant pattern of behavior in the current system?	C H A S M	What kinds of systemic structures (either invented or redesigned) are required to operationalize the new mental models and achieve the vision?
	Patterns of Behavior (Adaptive Action)	What is the behavior over time of key indicators in the current system?		What are some key indicators whose pattern of behavior shows that the desired vision is a reality?
	Day-to-Day Activities/Events (Reactive Action)	What are some specific events that characterize the current reality?		What are some specific events that illustrate how the vision is operating on a day-to-day basis?

Employing this matrix is one effective way of visualizing the gap, the chasm, the wicked problem. We suggest change agents begin by describing day-to-day activities/events in the current reality column. Then proceed up the column to address the questions in patterns of behavior and systemic structures. Based upon the picture that's now emerging, identify the

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[5] D.H. Kim, *Organizing for Learning: Strategies for Knowledge Creation and Enduring Change* (Waltham, MA: Pegasus Communications, 2001), 94.

prevailing assumptions and the evident mental models. Finish your portrayal of current reality by articulating what must be the vision in use. Then, based upon the change initiative you want to pursue, work down the desired future reality column, starting with the vision. This tool has great value in many ways, not least of which is that it helps leaders identify what day-to-day activities should be pursued now in order to pursue the desired vision. Seeing the gap between those desired activities and current activities helps create the immediate focus for change.

ILLUMINATING OUR BLIND SPOTS

So what's keeping us from the "zone of collective impact"—that expanded range of opportunity to successfully address wicked problems? By default, change-making can too easily conform to the structures already in place—both within our individual organizations and within our communities. Much of what is at play is who controls the change orientation: an institution (and single leaders) or the community? In Ron Heifitz's *Leadership With No Easy Answers*, he notes that the default is to the known and the comfortable inside our own frames; to our own problem solving delivery mechanisms. In so doing, we remain locked into the lower left quadrant (the narrow, tactical, siloed approach) of the adaptive leadership challenge chart above.

The way we go about lasting impact has to change to something new, some mixture of the technical/known *and* the adaptive/visionary. To break free of our defaults, we must reach for the zone of collective impact, which involves engaging *across* multiple sectors with an approach that is more systemic than programmatic and project oriented. Working organizationally toward disturbing the system toward a shared focus on addressing big social problems is likely to push all of us (and each of our organizations) beyond our comfort zones. Dean Robb reminds us "The ability to live in a state of ongoing innovation and change requires that the system be able to 'dance at the edge of chaos'—a kind of intentional flirtation with dis-equilibrium that allows new life to emerge and take root. This requires the ability to manage anxiety and potential (or actual) loss."[6] Resilience, he suggests, is based on adaptation, which we believe is essential for any organization trying to pursue a path of concerted action on wicked problems.

While the adaptive leadership challenge chart is just a frame and not a solution, it does help us locate and visualize where we might be in our own adaptive learning journey. Can we move along both axes simultaneously and well? Yes but each of us must recognize that we will always be in the middle of intent, program design, capacity, and context. It is difficult in most organizations to hold open the space to stay at this intentional level without defaulting into our known, familiar, controlled nitty-gritty.

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[6] D. Robb, "Building Resilient Organizations," *OD Practitioner*, Vo. 32, No. 3, (2000): 30.

Authentic leadership (aka, right being) is key. We believe real traction and success lies in the ego-less pursuit and wide invitation of many others to lean into the change. What do we have in common that can become the simple, fundamental, shared basis of our

What do we have in common that can become the simple, fundamental, shared basis of our concerted action? What's the fundamental embedded lack of opportunity issue?

concerted action? What's the fundamental embedded lack of opportunity issue? Is every family stable and every child well? Does everyone have a fair chance to activate opportunity in their lives (i.e., social equity)? What shared hopes do we think we <u>all</u> deserve? Isn't one's clarity about our own world view at the core of how we present ourselves to lean into wicked problems through concerted action? If we can put these pieces together clearly and authentically, we can make more progress around tough problems.

Is part of our default mindset that we convince ourselves that we don't have shared values and shared perspectives, thereby complicating concerted action? Has cynicism led us to believe that enlightened self-interest is the only or the most important value? We seek to break through that without sacrificing our ability to be effective in the day-to-day nitty gritty. Will we blindly adhere to the rules for how we are measured, fearing (believing) that those rules (and incentives, penalties, and public policies) drive everything? Have we all agreed that "the common good" is just an awkward, peripheral target, leaving us to navigate a world where that concept is not central to our thinking?

How did this notion of the common good become so peripheral for so many organizations? Why did we end up in the social sector talking more about efficiency than about the common good? How do our mental models get so rigid that we feel it's odd to attack those rigid models around common values? Why do we elect people who legislate absent this view?

At *Conversation*, we espouse the view that we are acting on our values, regardless of whether it's measurable and reportable, because it's the right thing. It is an expression of right being. In big organizations articulating intention is easy; operationalizing intention is tough. That's up to us, isn't it? Aren't we personally responsible for helping to craft the <u>at</u>tention of our leadership teams and the learning agendas of our organizations? It's not that our executive teams and board members don't care about the common good, but they don't make sufficient time for it. Perhaps we don't do enough of this dreaming of possibilities, nor asking our boards to dream big with us and to tolerate—indeed welcome—the time and space for us to do it in our operations.

What each of us is left with as we navigate this environment is a choice to persevere; a choice to not give up. And so we channeled the wisdom of Margaret Wheatley, whose book *Perseverance*[7] was given to all 2014 participants:

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[7] M.J. Wheatley, *Perseverance* (San Francisco: Berrett-Koehler Publishers, Inc., 2010), 59.

Choosing

Perseverance is a choice. It's not a simple, one-time choice, it's a daily one. There's never a final decision.

Our first "yes"—filled with energy and enthusiasm—brought us here, but it's of no use as the waters rise and the turbulence increases. By the time we're surrounded by obstacles and opposition, by aggression and mean-spiritedness, our initial choice has no meaning (if we can even remember that optimistic moment).

This is as it should be. Having to make a choice every day keeps us alert and present. Do I have the resources, internal and external, to keep going? Can I deal with what's in front of me right now? Do I have any patience left? Is there a way through this mess?

These critical questions require a momentary pause, a little reflection. Rather than just striking out or being reactive to a bad day, we offer ourselves freedom. Do I continue or do I give up? Even a brief pause creates the space for freedom. We're not trapped by circumstances or fatigue. We give ourselves a moment to look as clearly as we can at the current situation.

And then we make a conscious choice. Every day.

Going deeper into this exploration of our "blind spots" leads us to explore related questions.

> *Are we **responsible** (beyond lip service) for community building?*
> *How would our action manifest itself?*

Two colleagues open and frame this discussion. One sees the significant personal energy required to realign perception and reality. During periods of intense realignment work, she notes, we often encounter a tendency to bash "the others" and look elsewhere for "the leader." The energy drain and the bashing are insidious because they eat away at one's drive for change. Recognizing that the energy required to drive social change can be exhausting, we have to be careful to notice our own symptoms of frustration and acquiescence. This same colleague feels disconnected from the more intentional dimension of her work, which she wants to fuel her activist side. We think this invites a conscious commitment to open oneself to the world, despite the predictable presences of frustration, disappointment, etc.

Another colleague sees a different set of possibilities and a more conducive path. "I'm selective about those with whom I partner. Through experience, I've found it exhausting trying to partner with some individuals and organizations whose narrative about the future is based on what we *can't* do and *can't* have rather than on *what's possible*. Complementary, additive partnerships are energy producing rather than energy consuming." He acknowledges that in the midst of significant change work, he's been able to look beyond his own organization and, instead, think deeply about the broader work he does. The advantage, he points out, is that this posture energizes him and keeps him from having his

identity be limited to the organization for whom he works. Similarly, Kevin Matheny shares stories from his Portland experience, walking through the K-8 Faubion School seeing learning in progress or seeing moments of joy in the faces of medically fragile children at the Providence Child Center. "This restores my energy and lifts me up when the politics of adults gets in the way. People inspire one another…and need one another," he says.

An organization's brand acceptance is another way that wise community action can become manifest—but not the way we've traditionally thought about branding work as the promulgation of an identity with emotional characteristics. Now, successful foundations and other nonprofit organizations are looking at the degree to which their brand paves the way toward, or creates barriers for, concerted action.

> "[T]he emerging paradigm sees brand as having a broader and more strategic role in an organization's core performance, as well as having an internal role in expressing an organization's purposes, methods, and values. Increasingly, branding is a matter for the entire nonprofit executive team. At every step in an organization's strategy and at each juncture in its theory of change, a strong brand is increasingly seen as critical in helping to build operations capacity, galvanize support, and maintain focus on the social mission…..A strong brand helps bring greater credibility and trust to a project quicker, and acts as a catalyst for people to want to come to the table."[8]

Finally, how we think about responsibility in community building is very different from other parts of the world. Angela Boss, whose work permits her significant and rich exposure to many developing nations, observes that views of success differ around the world. She notes that success in the U.S. is often viewed as tied to personal success, whereas this is not true in many parts of the world where one's individual success is tied to one's neighbor's success. She describes a more communal/whole community success where people routinely work toward common goals. In these cultures, individual success is less valued than community success. Therefore, as we consider concerted action we need to be thoughtful about understanding the inherently held values and how we transmit values to, and embrace values from, one another. Otherwise, attempts to build something programmatic in partnership will stall or fail.

> *How do we get beyond the natural tendency of systems to calcify and stand in the way? How do we dissolve the natural tensions?*

The pervasive desire for personal and organizational security unconsciously contributes to the calcification of the system and stands in the way of the changes we want to see, notes Craig McGarry. Pushing against and trying to disturb a system requires acceptance of risk, which many people are reluctant to do. The only way to stay at the goal is to draw energy from someone or somewhere else. Another colleague believes systems calcify because many

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[8] N. Kylander & C. Stone, "The Role of Brand in the Nonprofit Sector," *Stanford Social Innovation Review* 35 (Spring 2012): 38.

believe we can't trust one another; that trust equity is shallow and pervasive skepticism stands in the way. "It's hard to 'do good' without a pile of evidence because people are so skeptical," notes Rick Herman. Pat Bower echoes this sentiment, expressing the view that our social space is so polarized and our willingness to adopt a set of shared principles is gone. He worries that we are losing our ability to work with each other, which is at the heart of so many of our problems today.

Any sustainable concerted action or movement, as we learned in Forces for Good[9], will require a clearly articulated theory of change. A simple shorthand template for articulating a theory of change could be:

- We believe that if we…(do x, y, and z,)….
- Collectively these will trigger a set of improving variables in community by 2025…
- Which, if sustained, lead to the following preconditions of a vibrant community….
- Which is characterized by this vision of our desired future state by 2035….

While seldom easy to do in one draft, the theory of change immediately makes clear the interconnectedness of the whole system. Recognizing that, we must be cautious to acknowledge that our myopic default tendency is to view our own theory of change through the lens of what *we* bring to the issue (whether acting as a single person or as an organization).

How do we work to remain open to other definitions of—and possible solutions to—wicked problems?

Wicked problems are too big to tackle as a single institution. We are better suited to illuminating our blind spots if we pause to ask ourselves whether we are clear how other stakeholders view the same barrier that we're pushing against. In so doing, we may find that some stakeholders may not see or describe the issues as dependent upon *our* proposed solutions. Unless we do, we may be unintentionally reinforcing our own blind spots. The question must be recurring and our answers to it must propel community building. This informs partnerships in a different way—not just horizontally, but systemically throughout the ecosystem.

Kim Scott, CEO of Trillium Family Services in Portland, Oregon, shares the story of Trillium's opening itself to new partnerships by guiding his whole organization to becoming intentionally focused on the seven commitments of the Sanctuary Model[10]. The

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[9] L.R. Crutchfield, & Grant H. McLeod, *Forces for Good: The Six Practices of High-Impact Nonprofits* (San Francisco: Jossey-Bass), 2008).

[10] The Sanctuary Model is a theory-based, trauma-informed, evidence-supported, whole culture approach that has a clear and structured methodology for creating or changing an organizational culture. As an organizational culture intervention, it is designed to facilitate the development of structures, processes, and behaviors on the part of staff, clients and the community-as-a-whole that can counteract the biological, affective, cognitive, social, and existential wounds suffered by the victims of traumatic experience and extended exposure to adversity. See http://www.sanctuaryweb.com/sanctuary-model.php

commitments are: 1) growth and change; 2) democracy; 3) social responsibility; 4) open communication; 5) social learning; 6) emotional intelligence; and 7) non-violence.

Internalizing these commitments, Kim reports, has led him to behave differently as CEO. Further, he believes the commitments have catalyzed the emergence of a new corporate culture for Trillium. This discussion reinforces our earlier position that values are the essential foundation for any concerted action. Get your principles and values clear, then organize from the values outward. Structure follows values. Ken Hubbell reminds us that leadership and collective action are really the collective work of people who care, standing on the values they share, and closing the gap between today and where they want to go. He says,

> "Wise action in community is both values based and collective. The authentic work of community change often revolves around shared leadership, community engagement, and reciprocity. Involving low income people in an equitable way is a necessary element of sharing the leadership circle. This is hard work that exposes friction around assumptions and beliefs. That's why it's so important to get the principles and values clear first. This is elusive and tough to operationalize because everybody's at risk—especially those accustomed to leading and deciding."

LEADING FROM THE FUTURE

Plausible narratives about the future help direct people's action and thinking toward the possibilities. We coauthor the narrative about the possibilities and the uncertainties of the future. Shaping and contributing to these narratives is what leaders naturally do in their work. Using tools like scenario thinking helps liberate us from the tunnel thinking of today and forces us to think much more broadly about possibilities in the future. This, then, makes all the more likely the realization and desire for acting in concerted action to pursue the best path forward for the most people.

Therefore, we see value in using the earlier Scenario 2030 work developed at GHC *Conversation 2012*[11] as a tool to free us from our conversation to this point (summarized above). In some ways, our discussion so far reflects the typical reaction of feeling "stuck" in our present moment, trying to navigate it, feeling that we can't do much about it, wondering how much in the system is fixed and how much is changeable. So, we seek to use plausible future scenarios as a "doorway" to move us past the assumption that we can't do anything about the bigger changes we'd like to see. This exercise enables us to try on different futures in order to look at the present moment differently.

We affirm that the scenario drivers we developed in 2012 are still pretty embedded in today's North American discussion of concerted (wise) action toward collective impact.

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[11] Gary Hubbell Consulting, *The Social Sector and Philanthropy in 2030: Four Scenarios*, available for download at: http://garyhubbellconsulting.com/ideas-resources/publications

- Driver 1: Approaches to pressing social issues and mandates (about education, employment, retirement, immigration, the safety net, etc.) and how society will agree to respond—from proactively to a more hesitant, conservative, reactive way.

- Driver 2: Society's orientation toward philanthropy – whether the social sector and philanthropy will be organizational, systemic, top-down orchestrated or full of innovation with lots of different models.

Imagining Possible Futures 2030 When Driving Forces Interact

OPTIMAL & VIGOROUS

Robust opportunities, strong incentives for collaboration & networks, creative/innovative

"Scenario" B
Lights and Shadows

Limited, disjointed, shallow, gap-filling, Band-Aid approaches exist amidst robust opportunities, strong incentives for collaboration & networks, in a creative / innovative era

Scenario Highlights and Milestones
- The economic malaise persists until 2017, followed by a rebound overall but with a shrinking middle class.
- Frog in the slow boiling water.
- The "science" of best practice metrics has blinding adherence for the followers.
- Social solutions, despite their notoriety, provide little fundamental or systemic change.
- Grassroots and youth-led vanguard organizations emerge in the shadows.

"Scenario" A
Elevated Intentions

Strong, integrated, deep, systemic, long-term responses exist amidst robust opportunities, strong incentives for collaboration & networks, in a creative / innovative era

Scenario Highlights and Milestones
- A consciousness transformation occurs, possibly advanced by an economic disaster or pandemic that triggers mass recognition.
- Near universal access to technology enhances awareness, promulgates engagement, and levels the playing field
- Moving toward more engaged civil discourse and away from a "me" and "right now" mentality to "we" and "long term" thinking.
- Public/private/social sector partnerships have become increasingly common.
- Multiple X-Prize offerings appear.

Driver 2: Society's orientation to philanthropy

Driver 1: Approaches to pressing social issues)

LIMITED & REACTIVE

Limited, disjointed, shallow, gap-filling, Band-Aid

OPTIMAL & VIGOROUS

Strong, integrated, deep, systemic, long-term responses

"Scenario" C
The Long Slog

Limited, disjointed, shallow, gap-filling, Band-Aid approaches exist amidst tight limits, siloed approaches, where traditional approaches continue to dominate

Scenario Highlights and Milestones
- Long, sustained economic slowness and lack of traction throughout the 2010s and into the early 2020s.
- Scarcity thinking prevails.
- Increasingly shrill civic "discourse" all but paralyzes governments.
- Quiet, slow gains by women; political leadership growth by women in mid-2020s in U.S., Canada, and Mexico (first U.S. woman president in 2024).
- Boomers are beginning to transition out of leadership; many Baby boomer donors have had to reduce giving due to resource exhaustion during the period.
- An economic and cultural "reset" begins to emerge in the mid-2020s.

"Scenario" D
Tribes and Networks

Strong, integrated, deep, systemic, long-term responses exist amidst tight limits, siloed approaches, where traditional approaches continue to dominate

Scenario Highlights and Milestones
- Social and economic turbulence continues for two decades.
- Polarity and well-resourced silos have bred passivity and frustration with the status quo.
- A new sense of "tribalism" brings innovation and effective solutions.
- Traditional institutions can't keep pace with the changes in the marketplace.
- Millennials follow in Baby Boomers' footsteps in philanthropy and advocacy

LIMITED & REACTIVE

Tight limits, siloed approach, traditional approaches continue to dominate

Conversation participants were divided into four small groups and asked to spend some time reviewing the descriptive language of their assigned 2030 scenario. Albeit having comparatively little time to become immersed in the dynamics of the scenarios, each group was asked to address two questions: 1) what prevailing mental models would have had to have been in place for this scenario to occur? and 2) what are the wicked problems in this scenario?

Their responses are summarized below.

Imagining the Prevailing Mental Models & Wicked Problems of Possible Futures 2030

"Scenario" B = Lights and Shadows

Likely Prevailing Mental Models:
- A majority operates with the belief that if we continue doing what we're doing, someone will figure it out and fix the big problems.
- Pursuit of best practices in the sector may be genuine and authentic or merely superficial. It is easy for large institutions to simply adopt their default position—clinging to their niche—thereby producing a common feeling of being comfortably numb.
- Newer philanthropists who question traditional practices channel funding to non-traditional practices and technology enabled young people (who tend to work in the shadows).

Wicked Problems:
- Social justice, fairness, and equity issues abound, largely because most attempts to address them appear disconnected and, as a result, produce little or no systemic relief.
- For traditionally disenfranchised people (immigrants, ethnic minority people, and the poor), the "American Dream" is elusive, as many are in seemingly intractable social and economic difficulty, thereby placing great burden on governmental social service supports.
- Economic insecurity among a shrinking middle class fuels pervasive—if not always dramatic—physical and mental health vulnerabilities.
- "Traditional" collaboration suffers, as organizations are working hard to adapt and "stick to their knitting." However, technology has a convening effect for grassroots people and helps to overcome some perceived service gaps through collaboration primarily on a local basis.
- Environmental issues persist. Those in the spotlight fight an uphill battle to advance coordinated and collaborative efforts to get more people to care about longer-term energy and environmental issues, while at the same time pursuing sustainable solutions to energy needs. This situation is compounded by narrowing charitable contribution tax protections, thereby pitting government against charitable organizations in some circles for widespread recognition of who produces greater impact for the dollar.

"Scenario" A = Elevated Intentions

Likely Prevailing Mental Models:
- A public/private sector convergence drives a widely shared vision. The public has become reenergized about what is possible with government; public and private sectors are driving the innovation, while governmental follows along.
- Technology reinforces and produces transparency.
- Decision-making is more democratized, which expands the range of possibilities.
- Effective civil discourse is evident, with many taking a collective, long view.

Wicked Problems:
- Risk of complacency…people thinking things are better than they really are; dwindling of passion; potentially shrinking pool of philanthropic resources.
- An anti-establishment/anti-mainstream minority (e.g., gangs, cartels, hackers, counter-culturalists) continually nibble at the edges, creating disturbance and fomenting divergence where they can.

Driver 2: Society's orientation to philanthropy

Driver 1: Approaches to pressing social issues)

"Scenario" C = The Long Slog

Likely Prevailing Mental Models:
- Scarcity drives conversations of efficiencies. Focus on effectiveness counterintuitively fosters greater scarcity and we begin to starve things that we need to really invest in and which could break through.
- This scenario is created by people waiting for a leader to emerge; there's a lack of convening and other catalytic behavior. Instead, we react to crisis and catastrophe.
- A hunkering down to the point of not being able to engage…until someone/something pushes a few of us to stay renewed and creative.

Wicked Problems:
- All social problems exist at uncomfortably high levels (poverty, crime and incarceration, high unemployment, food insecurity, homelessness, access to healthcare and education, etc.).
- Incongruence between people's actual needs and their perceived needs (e.g., people's need for healthcare at a time of governmental scarcity) and between values and actions.
- Sense of scarcity.
- Government seems disengaged and unable to help society solve its issues.
- Passing of the baton from Boomers to Millennials wasn't effective.
- People say they care about the environment but not if it disrupts their convenience.

"Scenario" D = Tribes & Networks

Likely Prevailing Mental Models:
- Sense of regionalism and fragmentation of society, some groups/tribes succeeding and innovative; others failing.
- Growing mistrust of government to produce good results for society.
- If it's to be it's up to me – local and individual leaders take charge for local and regional solutions
- Bias against bureaucracy and large scale one-size fits all solutions.
- Increased willingness to narrowly define the group's membership.

Wicked Problems:
- Continued polarization – less cooperation.
- Continued decline of government to address problems due to reduced resources.
- Insufficient resources to address problems in health and the environment.
- Greater wealth disparity – greater gap between the "haves" and "have nots," which contributes to increased social instability.
- Growing fragmentation of communities – tribalism; people taking care of their own.

LEADERSHIP LEARNING AGENDA TOWARD CONCERTED ACTION

In an attempt to build our leadership awareness, agility, and resilience, we ask whether there are common leadership postures regardless of the emerging scenario dynamics. Is it implicit in our mental model that all the wicked problems above will of course be with us in 2030? What would people of good heart and real intention lean into with purpose and concerted action to produce greater good for more people in these futures? Ultimately, we asked ourselves:

What is the leadership agenda toward concerted action for the common good?

A. *Keep alive the flame of passion for change and growth to avoid slipping into complacency.* You get what you expect—good and bad—and we have to spend time and energy on what we expect. If you craft expectations in the form of survival only, you can starve the organization for creativity for the future. Staying only at a transactional level and worried only about your own financial viability reduces the ability to respond creatively. Organizational leaders can't stay fixated on just trying to solve their organization's problems; they have to organize around strengths, destiny, and people living their dreams—a true call to leadership.

B. *Articulate the mindset we're trying to inculcate in ourselves, our organizations, and our families.* We may not be able to "fix" the problem, but all small changes ultimately lead to greater change. The leadership agenda is working on current issues while at the same time working to address the larger desired future. Working toward incremental change ultimately leads to bigger change.

C. *Practice inclusion in shared leadership as a positive driver for real change in any scenario.* Purposefully engage the people who have been left behind; otherwise, these same groups/people remain marginalized and the problems remain. We can't just leave everybody else to their own devices. Educate, encourage, build trust, and work to foster a confident, widely shared vision for the future. Take risks and derive context-specific solutions to being radically inclusive. How do we recreate ourselves to foster real inclusiveness? Can we put the poorest of the poor at our board tables? Will Robert's Rules of Order work in those contexts? Focus on the essential human dignity element of inclusiveness. It boils down to confronting one's own assumptions about your relationship with (and designs toward) power. Without consciously and explicitly reexamining the "power structure," there will be a tendency to unintentionally reinforce the existing power structure and produce numbers of people who are left out.

D. *Balance pragmatism <u>and</u> idealism.*

Letting this discussion soak overnight, participants shared one thought that is still churning for them about right being/wise action—the leadership agenda toward concerted action for

the common good. Responses, while individual and sometimes cathartic, are no less universal lessons for us all.

- *"Why are these conversations so hard? This is hard work, yet it's the kind of conversation we should be having routinely at work."*

- *"Getting reconnected with the real joy of our work. That's what's often missing from leadership. This joy, passion, and excitement is at the heart of leadership right being."*

- *"I have to slow down to catch up with the divine. If I do that, I come round to the essence of right being. This centers me and brings perspective."*

- *"Learning to stay with the uncertainty and the loss of control. What we're trying to do is not 'fix.' I may be unnecessarily complicating things by trying to jump to solutions."*

- *"Second-half-of-life thinking….I'm not sure I want to be in this labeled space. Isn't there value derived from both phases of life? There may be a trap in viewing oneself as having "matured" to second half of life 'wisdom,' when some drive could come from the brashness of youth and first-half-of-life thinking."*

- *"I recognize the difficulty of disengaging from the other dimensions of my work and life to be fully present right now."*

- *"We are sorting out the moments of transitions in organization and personal life."*

- *"I am thinking about relationships: the search for balance and perspective. Where are the relationships in my life? Where are those relationships less than what I want them to be? My work in fundraising typically connects me to well-educated, well-heeled people. I am not connecting with other people. This requires me to be more intentional about what matters most to me."*

- *"I use the silence to center and be present in this moment."*

- *"The most passionate people here have become so when speaking about the people on whom our missions are focused. Working with these people evokes my highest level of passion. This is the source of my nourishment."*

- *"The hardest part is the deconstructing of myself. I'm taking a little piece of you with me."*

- *"I'm feeling thankful; being able to be vulnerable as a leader. After talking with Ken about the concepts in* Panarchy[12] *(coupled human-environment systems), I've had a revelation about the deconstruction of our current situation. I'm beginning to recognize the stages of any system and where my system is in this journey. This leads to readjusting my own leadership learning journey."*

- *"I'm learning how to take full responsibility for my dreams and everyday choices. Where is my joy in this? Where is the intersection of my inner gladness and the world's great need?"*

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[12] L.H. Gunderson, and C. S. Holling, *Panarchy: Understanding Transformations in Human and Natural Systems* (Washington, D.C.: Island Press, 2001).

Illustration by Key Hubbell

During our session we provide time for each individual to do some personal reflection on their own path toward right being and wise action in community. We use worksheets to help frame a set of questions about adaptive leadership, personal mastery, and organizational culture building. As noted in the tables that follow, we rely heavily on Cashman's *Leadership From the Inside Ou*t. His view that the essence of leadership involves mastery of seven practices, which we feel are evocative of this notion of right being. Around each we offer five catalyst questions to foster individual reflection. Additionally, we created two tables, one around skills and the other around organizational culture, each with a four point self-assessment of comfort or mastery related to integrating performance and adaptation skills. These tables are adapted from Dean Robb's article, "Building Resilient Organizations."[13]

We consider all seven of Cashman's points of mastery, as they reinforce one another in a whole. Greatest personal value can come from holding all seven with intention, using the results of this self-assessment to help make evident the learning journey and one's work toward right being.

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[13] D. Robb, "Building Resilient Organizations," *OD Practitioner*, Vo. 32, No. 3, (2000).

Intentional Practice Areas to Master Right Being[14]

Being:

Uncovering empathy, activating compassion, and well-being

Personal:

Breaking free of self-limiting patterns to authentically express my truest, whole self

Purpose:

Engaging my true purpose to create a value to our world

Change:

Developing the ease of adapting to changing dynamics

Interpersonal:

Enlarging my ability to build trusting, honest relationships

Action:

Unleashing my untapped potential to "go further" toward authenticity

Balance:

Constructing a life of balance to exhibit regeneration instead of reaction. Adapting so my work makes a bigger and/or more lasting difference.

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[14] Adapted from Kevin Cashman's *Leadership From the Inside Out* (2008, Berrett-Koehler Publishers)

WORKSHEET OF INTENTIONAL PRACTICE AREAS TO MASTER RIGHT BEING[15]

Area of Self-Mastery	1 Why is this important to me, to my organization, to my subsector and to my community?	2 Where am I already strong in this area? How can I be more authentic in this area?	3 How am I adding new value to my organizational culture and environment through my leadership?	4 How is my leadership contribution impacting the health and well-being of our community/sector/society? What is different because I am "awake" and fully focused on wise action in community?	5 What will I do to take total responsibility for the next phase of my journey to authenticity and right being mastery? What coaching help will I need?	Other thoughts
Being Uncovering empathy, activating compassion, and well-being						
Personal Breaking free of self-limiting patterns to authentically express my truest, whole self						
Purpose Engaging my true purpose to create a value to our world						
Change: Developing the ease of adapting to changing dynamics						
Interpersonal Enlarging my ability to build trusting, honest relationships						

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[15] Adapted from Kevin Cashman's *Leadership From the Inside Out* (2008, Berrett-Koehler Publishers)

Table 1 - Skills

Performance-Oriented Skills (For maintaining equilibrium, focus, and action within the current system)	Self-Assessment of My/Our Current Level of Comfort or Mastery				Adaptation-Oriented Skills (For creating disequilibrium, exploration of new systems, and creating the safety and support needed for change)	Self-Assessment of My/Our Current Level of Comfort or Mastery			
	Novice Have a beginning awareness of the subject area but mostly at the level of abstract concepts and ideas. Apply skills by following a clear set of rules but can't yet adapt practices to the context.	**Intermediate** Gaining deeper appreciation of the subject area but acknowledge a lack of knowledge about the discipline as a whole. Reliant on well-defined technical tools as I/we follow prescribed steps.	**Competent** Have familiarity and working experience of full array of "knowledge" about the subject. Apply tools and principles by adapting practices through careful study and selection among viable alternatives.	**Proficient** Have internalized all the key tools and concepts and can reliably apply them in a flexible and fluid manner. Intuitively grasp the "whole" subject matter and can teach or coach others.		**Novice** Have a beginning awareness of the subject area but mostly at the level of abstract concepts and ideas. Apply skills by following a clear set of rules but can't yet adapt practices to the context.	**Intermediate** Gaining deeper appreciation of the subject area but acknowledge a lack of knowledge about the discipline as a whole. Reliant on well-defined technical tools as I/we follow prescribed steps.	**Competent** Have familiarity and working experience of full array of "knowledge" about the subject. Apply tools and principles by adapting practices through careful study and selection among viable alternatives.	**Proficient** Have internalized all the key tools and concepts and can reliably apply them in a flexible and fluid manner. Intuitively grasp the "whole" subject matter and can teach or coach others.
Task performance & operational execution					Visioning				
Performance management: focusing behaviors and goals within a narrow range					Diversity and individuality in generating a wide range of possible viewpoints, goals, perceptions, and behaviors				
Organizational alignment & coordination (internal focus)					Exploration of environmental change and its implications for organizational focus, structure and potential diversification (external focus)				
Problem-solving					Creativity, experimentation, learning & inquiry				
Rational, analytical, linear thought					Emotional competency, intuition, "soul" work				
Convergent thinking: closure and focus					Divergent thinking: opening up options; resisting early closure; tolerance of ambiguity				
Focus on the concrete and specific					Focus on the system, its organizing principles, structures, values, and assumptions				
Action					Self-reflection, humility (remaining "teachable")				

Table 2 - Culture

Performance-Oriented Culture (For maintaining equilibrium, focus, and action within the current system)	Self-Assessment of My/Our Current Level of Comfort or Mastery				Adaptation-Oriented Culture (For creating disequilibrium, exploration of new systems, and creating the safety and support needed for change)	Self-Assessment of My/Our Current Level of Comfort or Mastery			
	Novice — Have a beginning awareness of the subject area but mostly at the level of abstract concepts and ideas. Apply skills by following a clear set of rules but can't yet adapt practices to the context.	Intermediate — Gaining deeper appreciation of the subject area but acknowledge a lack of knowledge about the discipline as a whole. Reliant on well-defined technical tools as I/we follow prescribed steps.	Competent — Have familiarity and working experience of full array of "knowledge" about the subject. Apply tools and principles by adapting practices through careful study and selection among viable alternatives.	Proficient — Have internalized all the key tools and concepts and can reliably apply them in a flexible and fluid manner. Intuitively grasp the "whole" subject matter and can teach or coach others.		Novice — Have a beginning awareness of the subject area but mostly at the level of abstract concepts and ideas. Apply skills by following a clear set of rules but can't yet adapt practices to the context.	Intermediate — Gaining deeper appreciation of the subject area but acknowledge a lack of knowledge about the discipline as a whole. Reliant on well-defined technical tools as I/we follow prescribed steps.	Competent — Have familiarity and working experience of full array of "knowledge" about the subject. Apply tools and principles by adapting practices through careful study and selection among viable alternatives.	Proficient — Have internalized all the key tools and concepts and can reliably apply them in a flexible and fluid manner. Intuitively grasp the "whole" subject matter and can teach or coach others.
Production-oriented					Innovation-oriented				
Perfection: "get it right the first time"					Experimentation & learning				
Error detection & correction					Appreciating, wondering, speculating, trying				
Evaluative					Accepting; non-judgmental				
Tends toward unsafe, unemotional, protective concealment					Safe: to speak up, to be authentic, to express emotions appropriately				
Task orientation					Relationships, meaning & play orientation				
Alignment of people (can also manifest in a conformist culture)					Diversity & individuality (multiple perspectives to widen options)				
Tends toward exclusivity (high & low performers, strongly differentiated "in-group" & "out-group")					Inclusive				
Conformance to standards					Questioning standards				
Planning & control: plan your work & work your plan					Emergence: letting things unfold & develop				
Compliance-oriented					Commitment-oriented				
Tendency toward dependency (parent-child) relationships					Adult, responsible relationships: - mutual autonomy & interdependence				

Our Friday afternoon session built upon the individual reflection of the morning. We formed three peer coaching groups. These groups shared with one another some of their individual reflections and then looked for common learning themes and big insights. The emerging wisdom of all three groups follows.

Wisdom Sharing

- The thought of seeking to have <u>deep social impact brings with it equal parts fear and humility</u>.

- When the CEO is so singularly focused on the Adaptation Skills side, organizations can get so carried away with their vision that adequate attention isn't devoted to the Performance Skills, <u>creating imbalance,</u> which tends to become a self-limiting pattern. Another self-limiting pattern is perfectionism. A vision without a plan is a hallucination. We must dwell in the middle (and find balance) without worshipping the middle. Retain the benefits of migrating to the performance side or the adaptation side as the situation requires. <u>Aim for agility and balance</u>.

- Leaders must <u>let go to let come</u>. Letting go (of the illusion of control, etc.) is necessary for regeneration of self, and self-care is essential for sustainability.

- What is my servant leadership purpose? What does it mean to *flourish* (as individuals and communities)? We earn the right to lead by the service we provide our teams. It involves <u>patience, presence, and mindfulness</u>—identifying people's strengths and working with them commensurate with their ability and experience. Making "space" for people to grow, which sometimes means moving aside yourself to make space for others.

- Right being manifests itself in <u>being authentic and mastering the self</u>. That's a personal journey.

- In many work environments women sometimes feel vulnerable, but protected, feeling that we have to be a certain way in our jobs, which can prevents us from taking bold action. Understand your own personal archetype, which is essential to being able to know your learning agenda. <u>The leadership learning agenda is to take the risks, to act with resolve and without apology</u>.

- We are often called upon to provide <u>leadership in times of transition</u>. This is the challenge of living in multiple worlds (one foot in a transactional world; one in a visionary world—the known and the emerging). These transitions bring uncertainty and challenges to personal roles (the comfortable and familiar). *Someone* has to step up and take the lead, demonstrating wise risk, exhibiting innovation, and <u>personally showing up in a different way</u>. In times like these we can't be as concerned that everyone likes us. Recognize that nobody knows *exactly* what's going on in this environment so….why NOT me (in a leadership role)? To some, bold action may look like the "unauthorized"

action of impassioned individuals. Be out front without being too far out front! Do what you can. Demonstrate patience as a leader to make the space for conversations that foster change.

- Work can be all consuming, resulting in a perceived lack of space for ourselves. There can be a high risk of burnout due to a deeply felt responsibility to the work. Work intensity and dedication may unintentionally get in the way of <u>allowing or making space to learn and grow</u>. GHC *Conversations* are a kind of reflective space that is not part of the usual reward system. In organizational settings stepping back for reflection can frowned upon by others (or at least we perceive that's happening). We can feel guilt by taking time to think, instead of doing. It's important to figure out which things really matter most. Learning this personally then creates <u>the challenge of trying to figure out how to inject these learnings into the organization</u>. At what point should an organization not exist if it can't become adaptive and a learning organization?

- Ask what's best for the organization and how does that tie in to one's own personal transitions? Transitions (among organizations, out of organizations, between books) are a common theme among us.

- <u>Where is the joy</u>? Do you just have to tolerate the "non-joyful" for the good of the institution?

- Millennials lack tolerance of inaction; we lack the patience to see things through. Feeling an overwhelming sense of burden to act on what I see through my worldly connection. This will grow as the generation ages. However, the ubiquitous technology makes silence difficult, if not impossible. Natalia Lynn described a feeling of emptiness if forced to unplug from communication technology, saying "I don't feel validated until I see it in front of me." Yet wise action involves silence, space, and balance. Isolation, entitlement, and instant gratification are our millennial challenges. <u>I am having to dig deeper than expected to find my truth</u>.

Reflecting on this collective wisdom, Ken reminds us the adaptive challenge is recognizing that this may be a new moment where nobody knows the rules and we've never done this before yet there are parts of the emerging that feels right. In such moments we have to figure it out with others rather than adopting the default position of going back to something that is known. The adaptive challenge means we have to give the work (the problem) back to the people who own the problem. This means community. Everyone has to work and be valued in new ways. This is a perfect leadership opportunity for people with courage. Be alert for your defaults. Don't rush to technical solutions. Learn fast and experiment quickly.[16] For example, the health care system is breaking up in our favor, despite being awkward for us just now. It's time for people who care about optimal health and well-being to work it out together.

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[16] For more on these themes, See Ron Heifetz' two books: *Leadership Without Easy Answers* and *Leadership on the Line*.

Referring to insights from <u>The Ingenuity Gap</u>[17], Ken notes a common tendency to default to an unconscious belief that there must be some really smart people sitting in an office with "the answers to the problems we're facing." Many share a tacit assumption that these systems that we've built in our society all work along some logic that is known by some smart people and these systems are kept within certain bounds. When certain things "go wrong," we assume *they* know why this has happened. Sadly, this is a widely shared mental model! Big, current, complex issues—like whether large scale health care reform will make us healthier—complicate this shared assumption. We seem tacitly to be waiting for somebody somewhere to do something about the things we see happening and help us understand what to do about it.

This is the leadership opening. When we finally realize that *nobody's* got it completely figured out and that we're going to have to figure these tough things out together, we will be exhibiting adaptive leadership. It will require all kinds of brainy people working in all kinds of different ways in order to break through default thinking and assumptions—like the frequently experienced "we'll get to it later when we have more data"; or "we'll elect a new president who will appoint a Secretary of Complexity who will solve it." In actuality, we all have to work together in new ways to solve the wicked problems we face until something emerges that feels like a major shift. Waiting around for an expert is not wise action.

Each of us must ask ourselves: How do I fine tune myself to this moment? How do I harness my position, ideas, capacity, power, access, and my view in order to "get in" and "stay in" the wise action required to address these wicked problems?

We read aloud…

A Hopi Elder Speaks

"You have been telling the people that this is the Eleventh Hour, now you must go back and tell the people that this is the Hour. And there are things to be considered . . .

> Where are you living?
> What are you doing?
> What are your relationships?
> Are you in right relation?
> Where is your water?
> Know your garden.
> It is time to speak your Truth.
> Create your community.

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[17] Thomas Homer-Dixon, *The Ingenuity Gap: Facing the Economic, Environmental, and Other Challenges of an Increasingly Complex and Unpredictable Future* (New York: Vintage, 2002).

Be good to each other.
And do not look outside yourself for the leader."

Then he clasped his hands together, smiled, and said, "This could be a good time!"

"There is a river flowing now very fast. It is so great and swift that there are those who will be afraid. They will try to hold on to the shore. They will feel they are torn apart and will suffer greatly.

"Know the river has its destination. The elders say we must let go of the shore, push off into the middle of the river, keep our eyes open, and our heads above water. And I say, see who is in there with you and celebrate. At this time in history, we are to take nothing personally, Least of all ourselves. For the moment that we do, our spiritual growth and journey comes to a halt.

"The time for the lone wolf is over. Gather yourselves! Banish the word struggle from you attitude and your vocabulary. All that we do now must be done in a sacred manner and in celebration.

"We are the ones we've been waiting for."

-- attributed to an unnamed Hopi elder
Hopi Nation
Oraibi, Arizona

WHAT IS OUR OPENING? WHAT IS MY WORK?

Our final session builds on the dialogue of the days before. What is our work, especially against the seemingly immovable objects we've called wicked problems? If difference making is our work, how do we discern where to apply our energy and for how long?

We keep coming back to the theme of openings. There is an opening now because nobody really knows what's happening in some of the biggest systemic undertakings, like U.S. health care system transformation, for example. Some of us say *this* is my opening and, channeling the Hopi elders' wisdom, recognize that we can't look outside for a leader. The leadership required for the breakthrough may very well be me, as John Swanholm noted earlier.

One of us offers the opinion that this opening could be fun. "This moment, and my stance in it, is reinvigorating me. I had been feeling behind on the community immersion dimension. Now I'm working to address social disparities in a very real way. I may only be focused on my community, but this is an opening to make a difference where I can."

There is great value in engaging intentionally with people we don't regularly see. This means getting beyond the familiar. This is part of the adaptive connecting of dots—sense making.

We often talk about what's right for our clients/people we serve but we spend far less time talking about what's right for us to do as an organization. As an organization, we need to be honoring the intention and the spirit of doing good, celebrating the shared purpose of

doing good, and recognizing the moments of right being. Each moment could be alignment of our attention and our intention.

In Peter Senge's introduction to David Boehm's book *Synchronicity*, he says the aperture (opening) in the social realm is framed by the initial spirit of that intention. So, what we're talking about here is how to protect an opening for change. Senge tells us we have to make sure that the spirit of that intention is right and good. Hold to the spirit of your original intention rather than being distracted by your own marketing, promotion, and organizational profit needs. The gestalt of something is shaped by its beginning. If you start out of balance, it's unlikely to get the initiative back in balance. For things that are highly interdependent the fractal or the gestalt that is formed at the beginning will be amplified thereafter. If the spirit of our intention is right and good, we'll see that amplified in the work; if it's diffused or distracted, we'll see the work dissipate into disjointedness.

Look at the words you use with one another and what you say to others. Do you behave in a way that lives up to your words? The intention may be well framed and well stated but, if the work of the people involved doesn't match the intention, the opening will be incomplete and distracted by "transactions" until such time as the work drifts

> *"My intention is to surround myself with people who can help me extend my intention within my organization."*
>
> *Pat Bower*

far from the original spirit of intention. The challenge in most social sector organizations (especially the big nonprofit organizations) is that the culture is one of a profit-making business. There is an energy unto itself around perpetuating the institution. Therefore, you have to be watchful, serious, and attentive to the spirit of what you're trying to do. This makes the spirit real and elastic.

The values that produce the original intention are important and worth clarifying. Repeatedly in your organizational work you may have to ask, "What was the spirit of our intention as we prepared for this opening?" The challenge is to hold the aperture open and to bring a different perspective within your culture. Nurturing core values can keep you in places that may be struggling for clarity and purpose—where values get clouded, lost, or competing. Often decisions get made out of fear of loss. If the values aren't widely shared, the work outcomes won't reflect the values. Many organizations lack sufficient shared perspective around those values. Understanding how those values are transmitted and reinforced is a telling signal of the true core of the organization.

As participants in *Conversation 2014*, all of us were asking how we help our organizations create more space for conversations like this one. In the health care context, perhaps we can leverage the role of hospitals to do something larger than they have done in the past. How real is this movement toward population health? In other sectors the role may be different. We must seize what leverage opportunities exist, even if they are short-lived. In the past, philanthropy executives asked their organizations to tell them what the development teams

should pursue. Now, because of the unique posture and connection of many development people, we/they are in a position to help guide the focus and intention of their organizations. The role of development people is to hold this open and challenge the hospital to act more fully on the original intention (vision). Maybe that's what bold action looks like moving forward.

As we note throughout our conversation, right being requires a new level of personal authenticity and responsibility for leaning into these wicked problems. Parker Palmer[18] identifies five shadows that dog each of us as people of good heart. He says, "If we, as leaders, are to cast less shadow and more light, we need to ride certain monsters all the way down, explore the shadows they create, and experience the transformation that can come as we 'get into' our own spiritual lives." The shadows are:

1. <u>Insecurity about identity and worth</u>. He notes the all too common institutional dynamics that deprive many of their identity so the few can enhance their own, "as if identity were a zero-sum game, a win-lose situation (p. 86)."

2. <u>The universe is a battleground, hostile to human interests</u>. He acknowledges the competitive nature of our world (and our work), yet suggests that is largely because we make it so. Instead he invites us to reframe our view to open us to the insight that the universe is working together for good, which breeds energy and natural cooperation *if we only open ourselves to the belief in possibility* (pp. 87-88). It's not a battle: everything we need is here, right now.

3. <u>"Functional atheism" – the belief that the ultimate responsibility for everything rests with us</u>. Said another way: it all depends on me, whereas the great learning is that we are not the only actors on this stage. He notes, "The great community asks us to do only what we are able and trust the rest to other hands (pp. 88-89)."

4. A fourth shadow is the <u>fear of the natural chaos of life</u>, which leads many to unconsciously conclude that if I manage everything perfectly I won't have to deal with chaos and pain. He reminds us that the insight from our inner journey is that chaos is the precondition to creativity. "Even what has been created needs to be returned to chaos from time to time so that it can be regenerated in more vital form (pp. 89-90)."

5. The final shadow is that leaders project the denial of death, often undergirded by a <u>fear of failure</u>. This evokes an unconscious internal message that nothing can fail or die on my watch. "The best leaders in every setting reward people for taking worthwhile risks even if they are likely to fail. These leaders know that the death of an initiative—if it was tested for good reasons—is always a source of new learning (p. 90)."

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[18] P.J. Palmer, *Let Your Life Speak: Listening for the Voice of Vocation* (San Francisco: Jossey-Bass, 2000), 85 – 90.

LIVING RIGHT BEING

As we move toward the end of *Conversation 2014*, we feel compelled to share our observations and reflections about living right being, living with intention. We conclude that by living and behaving differently we can demonstrate a better way and, through the model of our own behavior, we make a difference. Recalling a visit to a collective community, one colleague shares their philosophy and saw it as living right being: "*My* success and my well-being is tied up in *your* success and your well-being. We are all truly connected. We are as strong as our weakest member. I am weak if I'm not caring for myself. It all ties to efforts of how to bring about more balance. This is the source and cause of inner peace."

In most organizations of our collective experience, there's not much time devoted to discussions fidelity to mission, discussions of authenticity, extending goodness. Instead, much of the focus is on operational excellence and trying to apply the ideas from business and other sectors. There's not much space in executive circles for conversations about authenticity and right being. Our participation in this *Conversation* leads many of us to acknowledge that we talk with our clients and organizational stakeholders about living their intention but we don't transfer the learnings to ourselves. We're not celebrating the purpose, the intention behind everything we do. We should push ourselves to do this—a *Conversation*-like conversation—more often. There are so many benefits from being with people with whom you don't normally convene. One of us suggests she will create openings in her organization by circulating articles and participating in book clubs. Another colleague commits to identifying in his organization those people with whom this thinking would naturally resonate and to then seeking them out for nourishing conversations.

In sensing our own individual level of commitment, each of us must ask ourselves how we know whether we want to continue to do the good we can do from our organizations and do things that make a more meaningful impact in the world. How will we introduce ideas to widen the frame? We must acknowledge our organization's habits of mind that often get created narrowly around efficiency and productivity. The way to transformation is awareness, recognizing that we're trapped by our own distinctions—it's either this or that; the heart or the delivery; the transaction or the transformation. We get stopped by the fact that it's neither *this* nor *that*. It's recognizing the power of *both/and*. So each of us has to ask ourselves how we will create a frame for our organization to have a different conversation. How does one take the spirit of this frame with you wherever you go? Why is the aperture not open at all times? How do you restore the aperture you desire when the first frame is more limiting? These are the questions that will take you deeper in your work. Don't underestimate the difficulty of getting this frame open with some people. You can't dictate the pace of one's opening and you can't hurry clarity about direction and transformation.

To this point, John Swanholm quoted the recent words of HealthEast Care System's CEO, Kathryn Correia, who commented about her organizational transformation challenge. "Our biggest challenge is to change us—all of us—our perspectives and our way of thinking. It's easier to act your way into a new way of thinking than to think your way into a new way of

acting, so we are working on decision making processes." Creating the frame for transformation also involves how the space and tone are created. We suggest an excellence resource, the ALIA Institute's *Little Book of Practice*[19], which describes how to hold the space open for conversations like this. An additional resource is www.ArtofHosting.org.

How does one who is working with intention and joy do so in order that the people beyond the "front row" can be engaged and included? People who want to do good have a higher capacity to create energy and openings that are attractive and have an ability to absorb other's energy in a good, multiplying way. This creates a cycle of renewable energy among people, which Natalia Lynn, our millennial generation colleague, says she feels in this room. One has to be willing to take their ego completely out of the equation if one is to see other perspectives authentically. **Right being is moving from an abstract concept to a lived experience.** We recognize that the types of breakthroughs we most desire actually take intentional work. Equity actually takes practice and work. We seek to foster this conversation in authentic ways with skillful leaders with similar intention.

In our work we must not lose sight of what brings us joy. Kevin Matheny references William Faulkner's Nobel Prize acceptance speech[20], where Faulkner said human beings have a puny, inexhaustible voice through the toughest of times. "Through our work," Kevin said, "*we* are the voice of the voiceless. This is what produces my joy." As we join Parker Palmer in listening for our voice of vocation, we are reminded to find it at "the intersection of your inner gladness where it meets the world's great need."[21]

This, and every GHC *Conversation*, attempts to help one clarify the question: What change do I want to make, where, and for what reasons? Through our continuing annual gatherings, we are trying to enrich and enlarge the circles of positive change that we're all trying to make. We constantly work to consider how we could harness this thinking in order to move generosity toward a more purposeful home, away from the too typical posture borne of having money to spend on big ideas because we're caring but privileged people acting under the rubric of philanthropy. Why do we have enough forethought, courage, and money to hold open these spaces one time per year but not continue this opening in many places, through many people?

If we see *Conversation* not as a "conference" but as a catalyst for individual commitment and action, then each of us must ask, "What am I prepared to do?" What is different about what I'm going to do? Because of what things? What's my leadership agenda and frame? For me, what is right being, wise action in community?

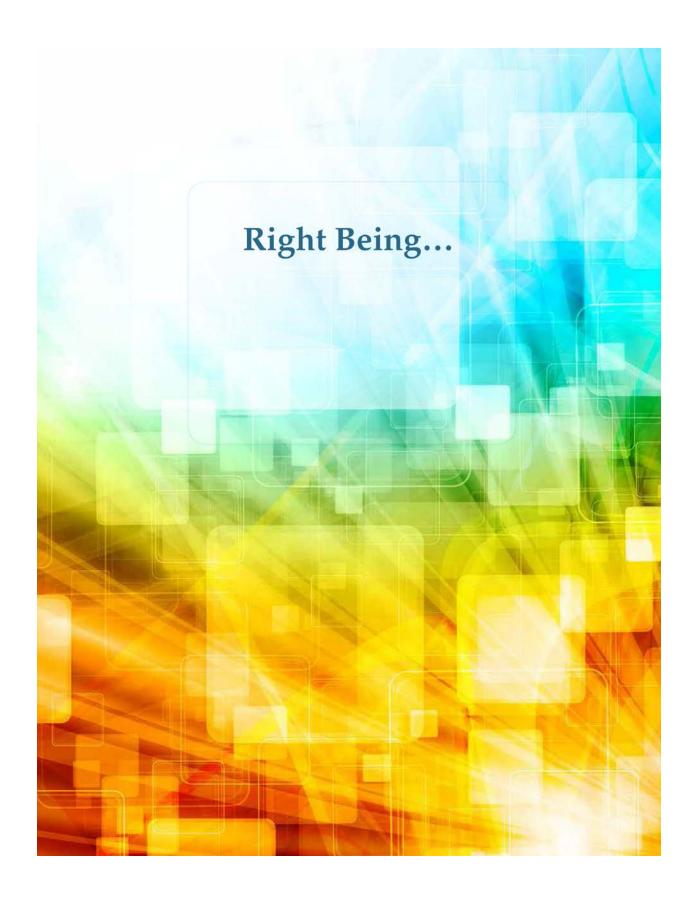[19] ALIA (Authentic Leadership In Action) Institute, http://aliainstitute.org/little-book-of-practice/
[20] For a complete transcript of this very short acceptance speech, download from: http://www.nobelprize.org/nobel_prizes/literature/laureates/1949/faulkner-speech.html
In that speech, Faulkner affirms the innate strength of man, saying: "I believe that man will not merely endure: he will prevail. He is immortal, not because he alone among creatures has an inexhaustible voice, but because he has a soul, a spirit capable of compassion and sacrifice and endurance."
[21] Here Palmer is quoting Fredrick Buechner. See Palmer's *Let Your Life Speak*, p. 16.

Appendix

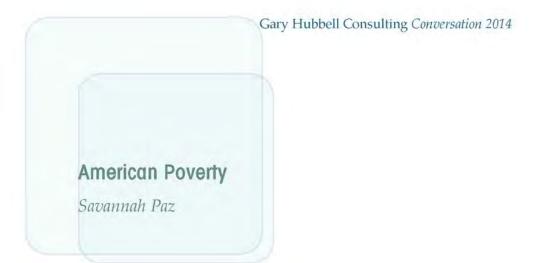## GHC *Conversation 2014* Participant Essays

Right Being…

Savannah Paz

Community Development Major, Portland State University

My name is Savannah Paz and I am a community development major with an emphasis on social change at Portland State University. In my experience through higher education I have had the opportunity to work as a student advocate at the Women's Resource Center and volunteer with the anti-gentrification project Not in Cully and the Campaign to End the New Jim Crow. I currently serve on the board of trustees for Trillium Family Services where I am also a spokesperson for their community program Chrysalis. I am passionate about achieving social justice and consider myself an agent of change. I am the mother of two amazing little boys who bring so much joy to my life and keep me very busy. In my free time I enjoy spending time with my family, reading books, watching documentaries and enjoying the company of friends. After graduation, I look forward to a career that allows me the opportunity to work from within communities so that we can collaborate and rise together. In the future I would like to return to higher education to pursue a master's degree in public policy.

This is Savannah's first GHC *Conversation.*

garyhubbell consulting

American Poverty

Savannah Paz

In America we are taught that we have unlimited freedom and are encouraged to prioritize our individual identities. We are taught that if you work hard and take care of your family, America will reward you with a good life you can feel proud of. The kind of life that allows you to feel pride in your job, where you live, the school your child attends, what car you drive, how much you own and, of course, infinite opportunity to access the best opportunities America has to offer. This creates a rat race between American people who are constantly competing against each other for the highest quality of life and access to the best resources because-as the privileged few are privy to know- there is only room for few at the top. America teaches us that those on the top deserve to be there and that those that fall short simply didn't work hard enough, and should be satisfied with what they have earned. Growing up in American poverty reveals a vast contrast to this myth of meritocracy. This dominant ideology has never been my reality, and much of American culture has acted as a powerful illusion used to keep me from understanding my own truth.

Like many American children, I was born into poverty. Born into a dark and gritty world, filled with fleeting dreams. Poverty has been the defining factor in my lived experience and perception of America. Living in American poverty had a profound impact on my emotional and physical well-being as a child, in ways that are unimaginable to most comfortable, class-privileged people. These experiences continue to affect my emotional, physical and mental health. Children are born into poverty every day in this country and America is plagued with stories similar to mine; stories of so many children who will spend their entire lives trying to escape poverty's powerful grip. These are stories of entire neighborhoods and communities that face displacement, unsafe housing conditions, inequitable public school systems, and limited access to basic needs like food and health care. Communities of color and areas where poverty is extreme remain the places where our American people face the most institutionalized and systemic oppression. While

parents work their bodies sick just to scrape by, our children are left to be raised up by the streets, and exposed to crime, violence, drugs and abuse. Some of these children will be lucky to find the support they need to survive. Too many will become victim to the harsh and cruel environment that poverty creates. This may leave them locked up in the prison system or dead on the streets, because there is no way out. American poverty is the reason why entire communities are suffering from post-traumatic stress disorder, trauma and abuse, not only at the hands of each other but-most directly-at the hands of America's capitalist system.

Our children and youth that are born into American poverty continue to be criminalized by the very institutions that claim to serve and support them in developing into productive adults. Yet we continue to punish them for a life that they did not choose. Have you visited a public elementary school in some of the poorest neighborhoods in our cities? I have had the opportunity to visit one of the poorest elementary schools in our state capital, Washington, DC, and I was horrified at the lack of resources and investment in some of America's most vulnerable children. The cold hard truth is that schools in America's poorest neighborhoods are preparing our students to enter the prison system instead of investing in opportunities to help them rise out of poverty. The school-to-prison pipeline is not to be trivialized as a theory or assertion. This process is an intentional and brutal one that continues to oppress and profit off of our Youth of Color nationwide. In fact public education has become so underfunded by the American government that schools in middle-class neighborhoods are beginning to feel the negative effects across the country. Programs that make learning fun and enjoyable for children and youth continue to be cut while we put more pressure on children to pass tests so we can prove that we are the best. In reality our children have no outlet for creativity, civic engagement, personal growth, and self-reflection. Instead they are forced to fit in a one size fits all box. I know of the high rates of high school dropout in this country and when I look at the disproportionate amount of Brown, Black and low-income White people who are being locked up in our growing for-profit prison system, my mind begins to spin as I connect the dots. The school to prison pipe line and the amount of our poorest youth who are being charged as adults so for-profit prisons can make a higher economic gain is truly disturbing. There is no justice for people victim to American poverty as the system is designed to leave them immobilized. The amount of institutionalized racism that plays out in American poverty is enough to drive a person insane. I cannot stand by and watch America treat its own citizens this way so that a mere few at the very top can make a profit.

There is so much internalized racism, classism, self-hatred and mental illness that develop out of poverty. American culture puts so much of an emphasis on materialistic items and economic status to define our self-worth. We value items and possessions over people and

human relationships. I always felt less-than, and hated myself while growing up in American poverty. Much of it had to do with the have-nots and poor living conditions but most of it had to do with the way I was treated. It seems that no one believed in me or felt optimistic about my abilities and progress. My teachers always labeled me the problem child and never taught me to believe in myself. The police in my neighborhood refused to acknowledge my presence and showed no empathy for me and the other children who lived in my complex when they were called there, which was quite often. Parents-who were overworked, stressed, and tired- just wanted us out of their way so they could take time to catch their breath, leaving our emotional needs neglected. American poverty is painful and dehumanizing, leaving millions feeling forgotten and invisible to their own country. This must change because America is plagued with poverty and those who fall victim need to be visible and have a voice.

The impacts that American poverty has on our own people and society are dangerous to this country. We continue to run and hide from poverty, doing everything we can to make enough money to temporarily buy our way out but we know that we can only run for so long. The gap between the poor and the wealthy continues to grow while our middle class begins to shrink more and more. We are seeing mental illness, violence, abuse, and crime creep into our middle class schools and neighborhoods as funding and resources diminish. Finally, issues that people in poverty have been struggling with for centuries are coming into the limelight, now that our middle class is beginning to feel the strain of inequitable distribution. Only the private dollar can gain you the access needed to a good education, ample resource, and a quality of life that every American deserves. We are so caught up in trying to survive in our own country that we lack the ability to live, to stand up for ourselves, to fight for what is right, to teach our children to demand what is rightfully theirs and to love and support one another. We are too busy competing to serve our own self-interests and fighting for scraps from the powers that be, that we have forgotten the importance of human connection, human capital, and strong communities. Somewhere in all the chaos we stopped holding ourselves, our institutions and government accountable. We fail to recognize our connection to one another and the fact that our society is a reflection of us all and that we are a reflection of our society.

Growing up in poverty has taught me many important lessons that will stick with me for the rest of my life. As much as America tries to make me forget and deny my experiences growing up in American poverty, I will never forget. I refuse to believe that was just a piece of my past that should be left there and that I should take every opportunity to leave poverty behind me. How can I celebrate my own success of escaping poverty when in the process it required me to leave so many behind? How can I celebrate my own accomplishments when I have lost so many loved ones to the hands of poverty? I refuse to

forget the lessons poverty has taught me and the people who instilled such powerful values and ethics in my young soul. I refuse to place my self-worth on what I can buy and access with money. I know that this would be a mistake as American poverty has shown me things that privileged eyes can't see, that their hands cannot touch. Lessons that are so entrenched in my soul that my heart and mind could not forget even if I tried. American poverty has taught me that people and community matter because when you have everything else working against you those are the only things that will keep you safe and bring tomorrow. Poverty has made me resourceful, resilient, and strong. It has guided me to have the courage to evolve from victim to survivor. Poverty has taught me to stand up and fight and that loyalty to your people is the most important and respected trait one can possess. Poverty has showed me the importance of working together, building partnerships and forming coalitions. Poverty has taught me to question those in power and not to fear the unknown. Poverty has taught me to find the beauty in the darkest of places. Beauty is there, waiting for light to reveal its true potential.

What living in American poverty has taught me the most is to never give up and to never stop fighting for justice. It has taught me to fight for my neighbor, my community, my city, and my people. On my own I am just a product of American poverty, left with emotions so large that they often leave me overwhelmed and paralyzed. But when I am In Community I feel alive. I move from surviving to living my life. I feel empowered by those who I share relationships with and recognize that I have the ability to shift the direction of my world while being supported by others. My hope is that others who hold class privilege can learn to share my sentiment on the impacts of poverty and its impact on our country and our people, without removing the voice of the populations they are attempting to assist. It seems like America wants to keep people in poverty oppressed in order to produce short-term economic gain for a privileged few. For this reason we must be careful that attempts on the behalf of social service organizations do not further perpetuate and victimize people in poverty. Working in alliance with oppressed groups must be an intentional, evolving, and humble process, or effective community organizing will not occur. What privileged service professionals must realize is that oppressed communities and individuals have been lifting each other up for centuries, and that we have the capability to engage in social justice work. What these communities need the most is resource, support, and agency. These are the things that privileged professionals and allies can provide in their work to address and abolish poverty. I will never stop fighting for the justice of those who remain trapped in American poverty. I understand the importance of my work being done from within these communities so that we can rise together. In spite of America's dismissal of poverty, I am going to make sure these communities are no longer overlooked and give voice to those living in American poverty.

Natalia Lynn

Author

Natalia Lynn is a fiction novelist and writer of The History Of Ours book series. As a writer, Natalia spends most of her time creating and exploring other worlds. Through her work, she constantly strives to understand the future of technology and global connectivity to address social and environmental issues.

After ten years in the food service industry with a degree in patisserie and baking from Le Cordon Bleu Academy, Natalia is now an activist in Seattle, supporting home gardens, GMO labeling, and Medical Cannabis awareness. She enjoys baking organic edibles for Seattle medical co-ops, and is a member of Patients for Safe Access, a national organization keeping cannabis safe, affordable, and sustainable to local economies.

Always ahead of media trends, Natalia incorporates current world events into the stories she writes. Through her studies and outreach, she hopes to help find collaborative solutions for a better tomorrow.

This is Natalia's first GHC *Conversation.*

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The Millennial Life: Stabilizing our Climate

Natalia Lynn

A glimpse into Millennial life in 2030 attempts to establish traits of aging Millennials (special, sheltered, entitled, confident, pressured by social standings) then utilize these characteristics to sustain our economy while emphasizing the importance of philanthropy during climate change. The facts presented are referenced from actual studies and publications, as well as concepts from previous GHC *Conversations*.*

Seattle, WA - May 18th, 2030
Radiation Levels – Moderate (Yellow)
Heat Index – 86 degrees F

It's hot. It's always hot. I woke up in my small apartment, lucky to still have clean water flowing from the tap, enough to water my 7 cannabis plants, kale patch, and herb garden by the window. The U.S. is on a 100 gallon per family allotment every day. I am 47 and live alone with two cats in the city so my allotment is 28 gallons a day. I remember my 20's when I didn't know how lucky we were. The average household used 400 gallons of water a day back then, with never-ending hot showers, running water over dishes in the sink, flushing toilets, and store shelves rowed with plastic bottles. Now plastic is greatly limited and we waste no water, not even a drop. Africa has been living on 5 gallons per day for close to two decades. My heart hurts when I watch personal accounts of impoverished nations, so close I can feel their pain through my V-Window (the latest holographic console around my wrist). Although there was stagnation in the tech market while ozone stability became priority #1, America has worked hard to keep ahead of the latest digital trends, wrist devices currently popular.

"You only know love when you let something go." No one wanted to let go of our abundant lifestyle, but the balance of the Universe had other plans for us.

Seattle, WA - May 28th, 2030
Radiation Levels – Take Caution, Sunscreen, Stay Indoors (Orange)
Heat Index – 82 degrees F

I started this log because I feel change coming. Our air quality is awful and although our city integrated clean energy ten years ago – tankless water heaters, electric cars, solar and wind power, Torus coil generators… the climate is still out of balance. I look out my window to see Smart electric cars and bikes clogging the streets below. Electrical wires used to drape every mile, but not anymore. In 2015, the government mandated that the wealthiest 1% of Americans invest in clean energy and emergency services, with healthy incentives. The public sector still faces enormous costs to adapt waste, infrastructure, and emergency systems in response to more extreme rains, flood, and disasters, but the 1% investments allowed state governments to begin the ongoing process of restructuring our power grid. A clean energy boom in the 20's helped maintain the U.S.'s first-world status through the "depressed years," and made fossil fuel drilling practically obsolete. My apartment is on the ninth floor. Tall condo buildings obstruct my view of solar reflector fields and a wind turbine covered hillside. The effects of our environmental abuse linger and will continue throughout my elderly years. Memory of a world without constant dehydration, sweat, and allergies drives me to create better for my children.

I have two children. My son's name is Miles, my daughter, Presley, both adopted from different countries at age 3. The Northwest is a lavish melting pot of cultures. My children are 8 and 9 yrs old now. They live in Canada with my mom, step-dad, father, stepmother, three aunts, and four uncles; all live on the same land farming cannabis, hempseeds, and

herbs. They raise fish and grow most of their own produce, supplying the community with extra. If Greed was the motto of the late 21st century, Generosity is the theme of this time. I am hopeful for the future, but I miss my family in Canada. I take the 0 (carbon) Train to see them once a month. I hope I can leave the city soon, take the cats and join them.

I work with my sister and brother downtown. We stay to make money, own a restaurant together called Saint Augustine where we strive to create meals with cancer fighting fruits and vegetables. Food variety is a challenge with such little water. Ocean freighter and cross-country truck transport has greatly decreased in the last five years. Oddly enough, people don't seem to mind life without an exorbitant amount of options at florescent-lit, processed-food grocers. Supermarkets of the past stocked on average, 47,000 products, most of which were produced by only a handful of food companies. We used to recycle piles of plastic, not knowing it took 17 million barrels of oil each year just to create water bottles. Now all packaging is biodegradable by law.

At Saint Augustine, we cook vegan and rely on local farms, co-ops, and bulk stores that sell mostly organics. Spices and chocolate are rare and celebrated. We waste as little as possible and employ a whole team of gardeners. The traditional restaurant experience is outdated. Eating has become a community activity instead of an elitist pursuit. By eliminating wait-staff, employees focus on feeding the sick and emotionally tattered city dwellers. By government mandate, restaurants are not allowed to serve meat; instead beef, ham, and poultry are controlled by the USDA, bred sustainable in small batches, and dispersed in one serving per week allotments. The average American used to eat over 200 lbs. of meat a year, now we eat 10lbs. Ocean fish are no longer consumed because of radiation poisoning.

The Pacific Northwest hoards its freshwater for good reason. After the Southwest/California drought ravaged the West, there was a massive migration North. Portland and Seattle tripled in size in 2017. We now live in tiny, stacked apartments and bike or walk everywhere. Many paved roads were leveled just for bike traffic. I remember a different city of single-family homes lining the streets, car congested thoroughfares, and endless parking spaces. Big developers rebuilt the landscape to accommodate growing tech business and "climate refugees" of drought. I had to give up clinging to what the city used to be, because it is not anymore.

Seattle, WA - Jun 19th, 2030
Radiation Levels – Take Caution, Sunscreen, Stay Indoors (Orange)
Heat Index – 96 degrees F
I spent the last week up in Canada on the farm next to a lake. I left the cats up there with the kids and took some time to adopt the pace of nature. It was relaxing, but sometimes I feared wolf and bear attacks when we played by the woods. The animal kingdom has been acting irrationally since the planet began overheating. My children and parents are happy. They have a thriving 3-acre cannabis garden with plants as tall as trees. The air is so oxygen rich, you can taste it heavy in your lungs. Hemp eats the CO_2, so my children are healthier

than ever which is the most important thing. Outside the city seems to be sheltered from smog and radiation. I hope they are.

I must finally admit that I am in a relationship with a man. He is a high power, political leader. He is married. I met him online. We began emotionally dating last year when he moved his family from Wisconsin to Tacoma. We're taking it slow, remaining friends, but we can't stay away from each other. I am in love. And perhaps it is my naïve hope that we will share a future together that has kept me here in the city.

I met him (let's call him Kevin) for late lunch today, on a rooftop patio downtown. Fans were blowing everywhere as he sat across from me, his white collar soaked under his grey hemp suit. He drank mint leaf soda from a glass. Because Kevin has no social media accounts and I do, it felt strange that he knew up-to-date information about me, but I know nothing about his life outside of our affair. He took his jacket off and we ate Indian spiced vegetables while talking about the current state of politics. At the end of the meal, he told me he was moving back to Wisconsin to live near fresh water and focus on emergency services, a job most men take shifts doing out of obligation to their communities. I was devastated that he was leaving, but tried not to show it. I am still devastated. He will be gone in six months, enough time for me to sell the restaurant and move north.

Our president, Michelle Obama, says, "People are not defined by institutions, but crafted by knowledge to persevere in the face of change." In 2024 after Hillary's 8 yr presidency, the American people voted Michelle into office, ironically mimicking family monarchs of the European Union. Millennials have established a new set of rules for leadership, valuing tradition and transparency, our tools for gaining power. The more confident and inherently wise a person, the more likely that Millennials will follow. We are a skeptical generation driven by the entitlement to survive. As a world unit, our every intention has become to halt the perpetuation of an unhealthy lifestyle that causes excess CO_2 emissions, ultimately triggering climate change and death.

Seattle, WA - Aug 1st, 2030
Radiation Levels – Take Caution, Sunscreen, Stay Indoors (Orange)
Heat Index – 110 degrees F
The last few months have been a challenge. My stepmother is very sick with influenza so Miles and Presley are with me in the city. They are jolly and resilient, members of the Silent Generation that craves togetherness, worships the circle of life, and speaks with nature. I love having them around. They surf their V-Window lessons in the air-conditioned apartment or restaurant dining room through the day to avoid heat stroke. Kevin came by the restaurant tonight and had dinner at the bar with the kids. They all seemed to enjoy each other's company. The children were laughing. Kevin told me insider information about military personnel merging efforts with the Red Cross, but he seemed energized at the thought. "Americans of today are well suited for community service, we like face-paced

work with variety." He is eager to invest in the solar factories that replaced the GM and Chrysler buildings in Michigan.

As a last ditch effort to save coastal areas, crews up and down the U.S. are painting surfaces white to mimic ice and reflect heat. Kevin is worried about flooding. In 2026, The US bucked tradition, ignored the status quo of no progress and quickly leveraged the last of our power to transition the world economy into a very low CO_2 emissions society. By implementing a Right Being, Wise Action mentality to our routines and communities, we successfully slowed the polar ice cap melt. Businesses and families are rewarded on the amount of CO_2 they remove from the atmosphere. As consumers we finally reject marketing techniques, and responsibly recycle our country's wealth into goods and services that honor the environment. The global temperature is still elevated. Glaciers have steadily been disappearing. A huge chunk of arctic is predicted to fall into the sea in the next 6 months, disrupting currents and raising sea levels even more. I remain optimistic about national security. Emergency services are prepared. With changing awareness, philanthropy has become the fastest growing, most powerful sector in America. I dare to be idealistic. Rather than denying a challenge, Millennials understand hurdles and rise to overcome. We've learned to love inconvenience and realize most obstacles we create are our own. Buddha says, "It is a man's own mind that lures him to evil. We are shaped by our thoughts; we become what we think." I think about our future a lot, almost every second.

My siblings and I sold the restaurant last week to a young couple from Guadalajara, Mexico with a passion for homeopathic cooking. I feel our enterprise will be in good hands. It is alarming that almost 60% of our customers couldn't afford to pay their tabs at least once last year. Constant attempts to overhaul the banking system are underway, but progress is slow. The government quickly learned that electronic currency does not work in a changing climate of heat waves and wind storms that often wipe out satellite towers. As soon as my stepmother's state appointed Doctor lays the foundation for a healthy recovery, I will take the children back to Canada where we can build our home and safely live out the rest of our days together off the grid.

I feel ready to leave the city. In the elevator yesterday, my neighbor's son, Shayan, a keen-minded High School senior laughed when his grandfather asked him about public service. It was only then I realized that our future lies in his hands. "Let me tell you what's going to happen to government and politics when we get ahold of them. We'll destroy them." Shayan paused to let his grandpa stew a bit before shrugging as if to tell the Boomer: It's not the end of the world, old man -- just the end of your world. "The thing about social institutions is when you destroy them, they get rebuilt eventually, in a different form for a different time." Millennials will continue to change public opinion with comprehensive outlooks on communication, currency, and energy exchange.
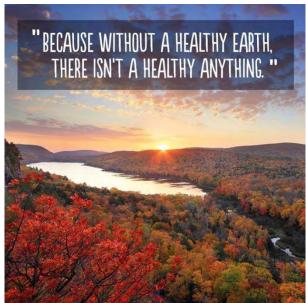
Seattle, WA - Sept 17th, 2030
Radiation Levels – Severe (Red)
Heat Index – 111 degrees F

Another earthquake hit Japan today. Nuclear rods from the core were exposed at the last Fukushima plant, releasing a terrifying amount of radiation into the already polluted Pacific Ocean. Tidal waves are headed for America's West Coast. It is mayhem. Some people are going on as if nothing is wrong, while others are wailing. I don't have much time. The kids are packing necessities into their backpacks; water, trail mix, socks, and sweatshirts. I am anxious and confused. Kevin swiped me twenty minutes ago, told me to come to the boat docks, and that he could help get us out. I am terrified. I will go to the docks to get his advice. My sister and brother are picking up the children on their way to Canada now. I hope the car can make it with enough battery charge. My brother left me his deceased wife's electric car. After saying goodbye to Kevin, I'll drive north and escape this disaster area.

I am crouched behind a door in an alley. Don't have time. I came to the docks where Kevin was waiting with his wife and daughters. As I made my way to the front of the crowd, I saw his wife in an orange cage elevator to be taken up to a helicopter. People were scared and yelling, desperate to get away. Kevin looked handsome with the wind blowing his hair and suit. He looked at me as he loaded his girls into the metal box beside their mom. The pilot shouted that they were full, room for one more. Kevin's family was urging him in. He turned back to me and his eyes were deeper than I'd ever seen. I noticed wrinkles around his temples as he stepped in and turned out, hurt in his solemn expression. The pilot, having no idea who I was, without empathy, slammed the mesh doors with a clang and the elevator rose. I watched as if in a dream with chaos all around me. Kevin's wife and children had no idea, afraid for their own lives. As the orange bottom of the elevator lifted them from view, the crowd swallowed me up. I had to fight with all my strength and balance to avoid being trampled. I found a doorway to hide behind. It looks like a dark abandoned convenience store rowed with empty shelves. I'm not venturing inside. There was just a knock at the door. My adrenaline is pumping as I slowly reach for the handle and pull back a sliver, light shining through as my pupils adjust to see Kevin standing in the alley, his back turned, shoulders hunched forward. He turns to me and his eyes are bigger than I've ever seen. "Come on. We need to find another way out."

Millenials have a daunting task ahead, but also potential to become a generation of forward thinkers and conscious contributors. Utilizing our resources and embracing the very transparency we crave, our global race can halt our climate's instable temperature spike. By focusing our intentions and establishing a constant connection to our actions with wisdom, strength, and empathy, we can become the change we seek.

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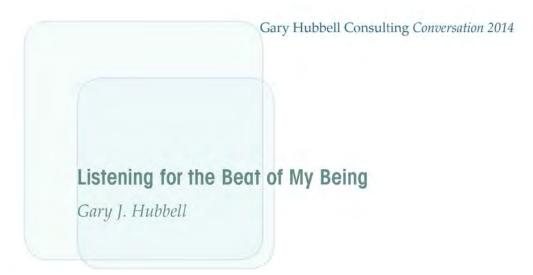
Principal, Gary Hubbell Consulting

Gary Hubbell has served others for more than three decades. Across that wonderful span of time, he's come to listen for the voice of his vocation. As his awareness grows, Gary routinely asks himself: "What animates me? What fosters that total alignment of my gifts and my desires; my contributions and the opportunities I seek; my intention and my attention?"

Hubbell strives to strengthen organizations for inevitable change and greater impact. He gets animated by the passions and energies of individuals and teams (inside and outside organizations) who are trying to change the world. He is energized by people who are on the cusp of big moves—whether they're conscious of it or not—helping others "see" in new ways, illuminating blind spots on the path to great things—not for themselves but for our shared world.

This motivating intention has led to a career arc characterized by: learning to tell a clear story (public relations); discerning interests and attitudes (opinion research); unlocking potential (employing appreciative inquiry and organizational development); setting about on new directions (scenario thinking, planning, facilitation, organizational change initiatives); catalyzing opportunity and unlocking joy (all aspects of philanthropy); and curating meaningful conversations (executive coaching and GHC *Conversations*).

Gary's work is a source of energy and renewal; an opportunity to learn and to teach; an opportunity to immerse himself in the noble pursuits of gifted and impassioned colleagues. He is animated by participating with people who have the courage to walk into their fear and through it, in pursuit of something they can uniquely contribute to making the world a better place.

garyhubbell consulting

Listening for the Beat of My Being

Gary J. Hubbell

How does one come to grips with the idea of Wise Action In Community? How does one keep from immediately feeling overwhelmed? Where does one start?

These are but a few of the questions that jump to mind as I consider my contribution to *Conversation 2014*. As I navigate the thousand thoughts I have about the topic, I soon realize that whatever next step I take in the direction of Wise Action toward some bigger improvement in society begins with me.

First, I've got to relinquish the ego-driven thought that I might possess within me "the solution"—as if the world (or my country, my region, my community, my organization, my unit, or my family) was something to be "fixed." Second, I quickly acknowledge that I have little hope of making positive impact outside if I have not found some inner gyroscope spinning well and straight. So I find myself returning to the idea of "Right Being," trusting that if I can be in right relation to myself I will be more likely to act with wisdom and, if led by a good heart, contribute In Community in ways that produce good for others.

What is My Work?
Throughout many of my first 50 years on this earth, I thought of my work (my vocation) as the jobs I held, the titles I was given, the activities I pursued, and the accomplishments I made in those roles. I've come now to realize that the last 50 years of my life should be about seeing my "work" quite differently. I now see my work embedded in the theme of *Conversation 2014*: Right Being…Wise Action…In Community. My work is about gaining and sustaining clarity of purpose and intent, which guides my behavior and deeds as I endeavor to act together with others for good. So this inner clarity and harmony becomes the guidance system for all I will do.

Writer, teacher, and activist, Parker Palmer, explores the concept of a divided life. He posits that we fear that our "inner light" will be snuffed out and/or that our "inner darkness" will be exposed for others to see. In so doing, we guard and block, keeping at bay a true

relationship with ourselves and, as a result, living without real integrity and separated from our soul. He says "as soon as we succumb to someone else's definition of who we are, we lose our sense of true self and our right relation to the world."[22] So what is the essence of my true self? What is my integrity—my moral code wiring that is unimpaired, undistilled, and genuine? What is the source of my joy? What is my work?

Frederick Buechner defines vocation as "the place where your deep gladness meets the world's deep need."[23] There it is; the connection of Right Being…Wise Action…In Community. Therefore, my work is about listening—first inwardly to know my deep gladness and outwardly to recognize the world's need. This won't happen automatically and it's not likely to happen with big loud, neon lights around what I need to hear and learn. I've got to be intentional, to practice listening—to myself and to the world—in ways that might be new for me. I've got to push through my ego to live with intention. As I do, I am more likely to find alignment of my intention and my attention—the personal integrity Palmer talks about. The better listener I become, the more likely will be good alignment of my Right Being with Wise Action.

Yet, this is not about a destination but a journey, a practice, a life's work. Despite the alignment of intention and attention, one can't guarantee the desired results. The beauty of this path is in the trying of it, observing, learning, "leaning into it" in order to gain deeper wisdom to be subsequently applied. None of our lives are pure linear progressions and growth curves. We get distracted, disturbed, deluded, and demoralized. Thus, it must become my work, my practice.

Some may see this path as the epitome of selfishness or self-centeredness. I tend to see this more within the framework Palmer presents. Being whole and good, being in right relation with our inner selves, being undivided so that we are living with soul is all our work. If it is this work that creates the context for all outer work, as I believe it is, then this is exactly where my focus ought to be.

Four questions help me with alignment and tend to foster greater internal wisdom about what is Right Being, leading to Wise Action. They are:

- What is the source of my nutrition?
- What must I learn?
- What disruption or disturbance will I walk into?
- Whether conscious of it or not, what does my organization need most of me?

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[22]Parker J. Palmer (2004). *A Hidden Wholeness: The Journey Toward an Undivided Life*. San Francisco: Jossey-Bass, p. 102.
[23]Buechner is the author of *Wishful Thinking: A Seeker's ABC*, and is quoted in Parker J. Palmer (2000). *Let Your Life Speak: Listening for the Voice of Vocation*. San Francisco: Jossey-Bass, p. 16.

The Source of My Nutrition

What we believe, we become. That which we feed our subconscious minds becomes our language and behavior. So when I think about being intentional about my work I've got to focus on what I'm feeding my soul. What am I reading? With whom do I surround myself? Are my professional endeavors life- and energy-affirming or are they draining me (despite the corresponding monetary reward or public recognition)? These are the questions that I think about a lot. Personally, I draw energy and great personal benefit from my professional life and from developing and hosting GHC Conversations. Relationships are central to my personal satisfaction. Therefore, I seek to engage in my client work and in sustaining Conversation as a key source of what is nutritious to me.

Helpful to me decades ago was my learning about the relationship of the subconscious mind to the conscious. I came to recognize that it is my subconscious mind that is the source of my words and deeds. I became aware of the torrents of poison that I had been feeding my unconscious mind through a variety of self-limiting inner talk, dinged self-esteem, and recurring doubt and worry. While I can't eliminate all the "chatter," I found that I can choose what and when to cancel the inputs and replace it with nutritious fare for my subconscious mind. Now, nearly 30 years after learning these helpful constructs, I'm now opening myself to meditation, which will become another source of nutrition. "Meditation becomes both a refuge and a training: a refuge into being, and a training into doing."[24]

What Must I Learn?

"Through learning, we re-create ourselves."[25] For as long as I can remember, I have subscribed to what is now the commonly accepted concept of life-long learning. I love to learn and I'm learning to learn in new ways. For me, having a mental map for my learning journey is important. In so doing, I become more intentional about what I seek to learn. Reading, writing, presenting, and group discussions have long been my preferred ways to learning. The current "phase" of my learning is comprised of four related elements.

1. **Physical wellness**—while I'm descended from a long line of rail thin family, the full presence of health is only partially connected to the absence of extra body weight. Endurance and physical strength naturally lessen as one ages, so it becomes something for which I must make more time and effort. Married to an avid distance runner, I'm routinely shown a deep appreciation for the physical and mental benefits of getting my heart rate up with my running shoes on. Mirroring the national dialogue on health insurance and affordability, I find myself taking more responsibility for my own wellness and avoiding behaviors that cause illness. We all have these inner conversations, but once the light switch goes on,

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[24]Martine Batchelor, "A Refuge Into Being." *Tricycle Daily Dharma*, February 8, 2014.
[25]Peter M. Senge (1990, 2006). *The Fifth Discipline: The Art and Practice of the Learning Organization*. New York: Currency-Doubleday, p. 13.

commitment deepens and the rationalizing and procrastinating stops. Time to get moving!

2. **Systems thinking**—Another learning from transitioning into my 2nd half century of life is that purely technical prowess is not enough if I truly want to understand how to have a greater impact on the world I care about. Many years ago I was introduced to the language of systems thinking but it seemed a distant and obtuse idea until beginning to work more closely with my brother, Ken Hubbell, in 2006. Ken's continuing search for a better understanding of systems has sparked my further study and practice. I have come to accept and appreciate the interconnectedness of all things. Therefore, any of my previous attempts to produce good were unintentionally narrow and limited and, worst yet, possibly creating other problems as a result.

In his book by the same name, Peter Senge defines the fifth discipline—systems thinking—as

> …a discipline for seeing wholes. It is a framework for seeing interrelationships rather than things, for seeing patterns of change rather than static "snapshots." It is a set of general principles — distilled over the course of the twentieth century, spanning fields as diverse as the physical and social sciences, engineering, and management….During the last thirty years, these tools have been applied to understand a wide range of corporate, urban, regional, economic, political, ecological, and even psychological systems. And systems thinking is a sensibility — for the subtle interconnectedness that gives living systems their unique character."[26]

Other great systems thinkers, Margaret Wheatley and Donnella Meadows, share equally helpful learnings about systems. Wheatley reminds us that systems are unknowable by themselves; they are irreducible.[27] Meadows adds:

> "Systems can't be controlled, but they can be designed and redesigned. We can't surge forward with certainty into a world of no surprises, but we can expect surprises and learn from them and even profit from them. We can't impose our will upon a system. We can listen to what the system tells us, and discover how its properties and values can work together to bring forth something much better than could ever be produced by our will alone. We can't control systems or figure them out, but we can dance with them."[28]

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[26]Ibid, pp. 68-69.

[27]Margaret J. Wheatley and Myron Kellner-Rogers (1999), *A Simpler Way*, Berrett-Koehler Publishers: San Francisco, p. 72.

[28]Donnella Meadows (2001). Dancing With Systems. *The Systems Thinker*, Pegasus Communications, Vol. 13, No. 2, March 2002, p. 2

3. **Bigger questions**—the key to intervening on any situation or system is to know the questions to ask that will produce the most leverage. Bigger questions will be tougher to answer, no doubt, yet they are the ones that more likely get to greater understanding of causality. In many organizational situations where I work, I see many passionate, well-intentioned professionals working feverishly to figure out what to do and how to do it. Too often missing from their perspective is a bone deep understanding of why something is being done. They work tirelessly in a myopic way, often only focused on their stated priorities and targets. This is like pushing rope uphill if their work is not imbued with an awareness and appreciation of the balancing reactions their efforts trigger in their environment (whether elsewhere in their own department, in another unit of the organization, or externally in their constituency). Systems thinking familiarity will help me be better able to advise these clients on how to navigate these situations.

4. **Spiritual journey**—While I will continue to have—and feed—a strong desire for acquiring new knowledge, I recognize a growing desire to develop deeper wisdom, which I equate to being on a spiritual journey. For me, this is a journey of discovery and practice. I am nearing a place where I will be able to articulate my true purpose. Kevin Cashman reminds us that "purpose is spirit seeking expression; awareness of it allows us to see our lives more clearly from the inside-out."[29]

What Disruption or Disturbance Will I Walk Into?

What I love about this question is that it assumes that surprise, disruption, and disturbance are in my future. While off-putting and destabilizing to some, I am growing to welcome the curve balls as a way of staying alert, energized, and agile. Let me be clear. This is not some blanket chest thumping, "bring it on!" declaration. It does not require me to embrace every disturbance. Rather, it's a conscious mindset shift to recognize what I can control, what I can influence, and what I must accept. It is a posture for pursuing and accepting those disruptions that may align with my purpose. Finally, the question does not presume that one remains in the disruption and disturbance once entering it. Cashman coaches us to walk into the fear and through it. Therefore, those disruptions that I choose to walk into are themselves learning journeys. Propelled by a sense of Right Being, confident in an openness to Wise Action, and welcoming concerted action, each disruption can become a personal and community catalyst for change and good.

Whether Conscious of It or Not, What Does My Organization Need Most of Me?

Leadership is the hard seat to occupy in an organization. Like any living organism or system, organizations are self-organizing and self-perpetuating. The leaders' role is less to steer or control but more to navigate and inspire, determining what conversations to be part of and how to engage in those conversations in ways that afford the opportunity to model

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[29]Kevin Cashman (2008). *Leadership From the Inside Out*. Berrett-Koehler Publishers: San Francisco, p. 75.

the mindsets you want others to adopt. Mostly it's about positioning oneself to be able to spot moments of authenticity and personal courage, as I believe that most people perform their work with the desire to do well and do the right thing. However, these golden moments of Right Being often go unnoticed. Those moments are not diminished by lack of fanfare and recognition, yet they are like lone fireflies in the sky—bright, interesting, yet fleeting. When recognized (with equal authenticity and personal courage) these singular moments are more often repeated and begin to attract similar action (and attitudes) from others. At those times the collective light is brighter. The resulting collective action—acting In Community—is now felt by more people.

Every one of us in organizations will at some point have difficulty seeing beyond our own view. We seemingly get trapped on a repetitive treadmill of functional competence. While performance can run high for a time, I'll argue that it's not sustainable and it's hollow—divided in Parker Palmer language. Stopping to imagine your organization exhibiting Wise Action In Community produces the question of what your organization needs most of you, whether leaders recognize it or not?

It's tough to express and demonstrate Wise Action regardless of your leadership position (e.g., leadership of a unit, a division, or an entire enterprise). Can you mandate organizational Right Being? Can an "enlightened" leader demand her executive team adopt her mindset, achieve her motivation, and pursue her intentional practice toward Right Being? Seems unlikely. There will be arguments for differences and diversity of views being the source of creativity. Yet, I'm not talking about thinking the same; I'm talking about alignment of intention and attention. I'm suggesting this is more about a way of being in relation to oneself, to one another, to the work, and to the world.

What if repeated attempts to introduce right thinking to others falls flat or has only partial success because some adopt it while others block it? Do you fire the non-adopters? At what point is it counter-productive (for the organization, for the individual, and for you as leader) to continue allowing a non-adopter to distract and diminish the collective efforts of the team? The seemingly easy path is to remove those who don't adopt. However, that action may only mask what the leader herself needs to recognize and learn about herself—say nothing of the legal and ethical ramifications of firing someone for "not being a seeker." Guiding us toward finding true self, Palmer invites us to consider, "we must withdraw the negative projections we make on people and situations—projections that serve mainly to mask our fears about ourselves—and acknowledge and embrace our own liabilities and limits."[30]
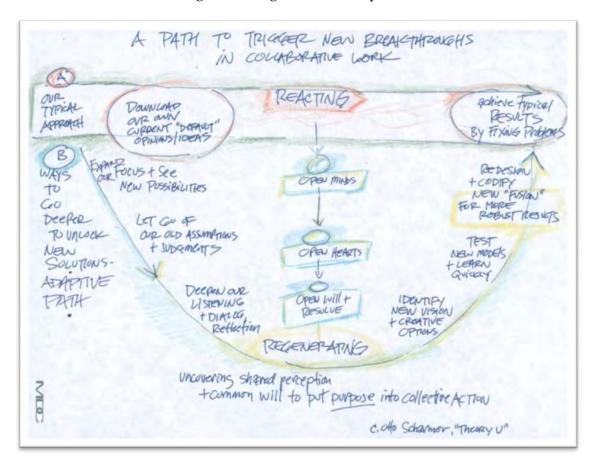
Implicitly, what your organization needs of you is to free yourself—and by demonstration, your colleagues—from organizational conceit and being so myopically mission focused that you lose sight of the whole system. Your organization needs you to model the balance of

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[30]Palmer, *Let Your Life Speak*, p. 29

essential ingredients that the whole organization must adopt: open minds, open hearts, open will and resolve.[31] More than technical prowess, this balance is key to fostering the conditions in which the "right team" can grow.

Look at the bottom of the U in the drawing. Only through the discipline to get and stay "open" will you, your teams, and your organizational colleagues uncover a shared perception and a common will to act with Wise Action In Community.

What if the leader's time and energy were on growing the wisdom of her team more so than pursuing the technical things (e.g., contracts, big deals, and all manner of "means to a desired end")? Too often this technical dance devolves into a downward spiral of manipulation—unconsciously and without malice, but nevertheless every bit as limiting. The response from some will be: yes, growing the wisdom of my team is ideal but my board demands that I hit certain metrics, my compensation is tied to an achievement ladder, etc. Are these two pursuits contradictory? Can one pursue short term position-specific requirements and do so filled with loving kindness and deep intention? I believe you can and I believe that the most enlightened organizations require this balance.

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[31]These ingredients, and the graphic that follows [drawn here by Ken Hubbell] is from C. Otto Scharmer, *Theory U: Leading From the Future As It Emerges*, (San Francisco: Berrett-Koehler Publishers, 2009).
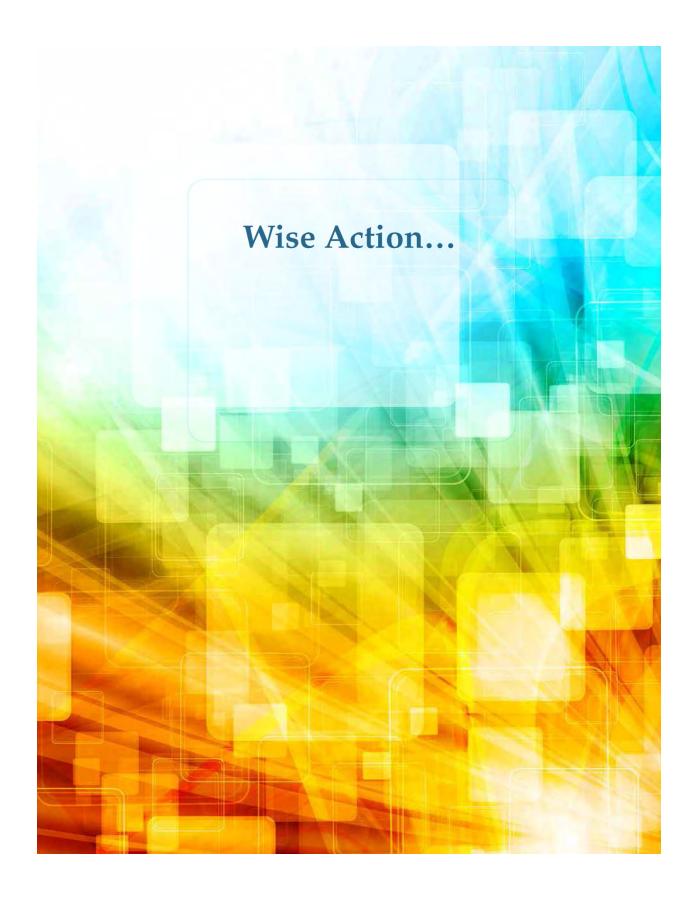
So the place to start this journey of understanding is with our own personal commitment to Right Being, or self-leadership, or mastering oneself. If there are seven areas of mastering leadership from the inside-out, first among them is Personal Mastery[32] (aka, Right Being).

Kevin Cashman's Eight Points for Personal Mastery

1. Take total responsibility.
   a. The foundation of genuine leadership is built with self-leadership, self-responsibility, and self-trust

2. Bring beliefs to conscious awareness
   a. Remind yourself of the Personal Mastery mantra: "As you believe, so shall you lead."

3. Develop awareness of character and coping
   a. Instead of overinvesting in Coping (reacting to circumstances to elicit an immediate result), commit your energies to leading with Character (the essence of who you are).

4. Practice Personal Mastery with others
   a. Practicing Personal Mastery requires risk and vulnerability. It means placing ourselves in situations where we may not be accepted or validated by others for who we are or what we think or believe. If we do not take this risk, we too often will be led by the expectations of others. As a result, we might unknowingly compromise our integrity.

5. Listen to feedback
   a. Rather than spending our energy defending a rigid state of self-awareness, we can think of Personal Mastery as a continuous, lifelong, learning process.
   b. Personal Mastery involves the delicate paradox of being open to learning from others without allowing ourselves to be unduly created by them.

6. Consider finding a coach
   a. …studies have shown that companies now use coaching 75 percent of the time to optimize performance vs. "fixing" problems. Having a coach as your partner during your growth process might be the most "right" thing you ever do.

7. Avoid confusing self-delusion with self-awareness
   a. Self-assessment can be the least accurate leadership assessment. To remedy this, use grounded, validated assessments with a solid research history to ensure that your growing self-awareness is real.

8. Be agile
   a. Understand and appreciate your strengths, but also be flexible and adaptable.

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[32]See Cashman, pp. 55-58.

Wise Action…

Patrick Bower

Vice President—development, St. Luke's University Health Network

Patrick Bower serves as the vice president for development at St. Luke's University Health Network, an integrated network of six hospitals serving Northeastern Pennsylvania and Western New Jersey.

Pat has 28 years of experience in the management of non-profit organizations, with particular expertise in campaign management and major gift fundraising. He has held senior fundraising positions at the University of Medicine & Dentistry of New Jersey (now part of Rutgers University), Iona College and the Boy Scouts of America. During the course of his career, Pat has led fundraising programs that secured over $200 million in charitable support.

Pat began his career as a community organizer in Chicago and Jersey City, New Jersey where he supported residents in their efforts to improve public education, neighborhood safety and serious environmental concerns.

Pat grew up in West Virginia and is a graduate of West Virginia University and St. Mary's Seminary, where he studied English literature, philosophy and theology. He enjoys hiking, reading and spending time with his wife, Diane, and their four children. Pat currently serves as Scoutmaster of Troop 121 in Clinton, NJ. He is a member of the Visiting Committee, WVU College of Arts & Sciences, Department of English and a trustee of the Minsi Trails Council, Boy Scouts of America.

This is Pat's first *GHC Conversation*.

garyhubbell consulting

Leadership and the Wisdom Traditions

Patrick Bower

As Third Sector leaders we desire stronger families, healthier lifestyles, better-educated children and increasing access to jobs and opportunity. Our collective hope for this brighter future is articulated in the mission statements of the nation's 1.5 million charities; but the way forward is unclear:

- **Our healthcare system** has transformed our ability to overcome illness and disease, enabling those with access to care the opportunity for full and active lives that past generations could only dream of. Yet, health care is expensive and perhaps unsustainable in its current form. It has also been criticized for overtreatment, medical errors, chronic underfunding of wellness and prevention, and failure to provide care to all.

- **Our public schools** have produced generations of well-prepared students who graduated into jobs that enabled them to support families and provide upward mobility for their children. But the middle class is shrinking and the nation's wealth gap is wider now than at any point in the past 75 years. As a result, our urban schools and the children they serve are in crisis, characterized by low-achievement, high drop-out rates, and a general malaise among teachers and students alike.

- **Strong families and supportive community organizations** have long been the bedrock of our economic and cultural success. They have imbued the unifying values of self-reliance, concern for others and a shared belief in a better future for all. Yet, increasing numbers of children are growing-up in unstable families. Violence and compromising behavior now cripple so many that our worst fears are being confirmed: fewer young people are entering adulthood with the character traits and resilience needed to forge authentic pathways to success and independence.

Conversation 2014 is an opportunity to consider how we can be more effective in meeting the challenges of our time—in both our employed roles as senior executives of hospitals,

schools, and human service organizations and in our non-employed roles as volunteers and benefactors.

When I first heard the organizing theme *Right Being…Wise Action…In Community*, I was struck by its metaphysical orientation. This phrasing seems to invite a discussion that is broader than the familiar topics of process improvement and business strategy. In fact, the phrase *Right Being…Wise Action…In Community* can be considered an elegantly concise definition of both wisdom and the goal of wisdom.

- **Right Being** concerns our basic orientation to the source of life as we define it and how that orientation is expressed in our relationship to ourselves and others. Right Being values congruence, authenticity and faithfulness to core beliefs, especially those that are shared by the world's major wisdom traditions: a belief in the sacredness of life and the interconnectedness of all things; an insistence on the primacy of love and the importance of servant-leadership and; acknowledgement that authentic spirituality involves the systematic deconstruction of the ego or false self.

- **Wise Action** flows from Right Being. It is an attitude toward life that is open, accepting and non-judgmental. Its hallmark is love and compassion towards ourselves and others leading to healing and personal wholeness. Wise Action stands in opposition to manipulation and dependency and often means refraining from action.

- **In Community** implies a willingness to enlarge our perspective and act collaboratively in the best interests of the group, affirming shared history, shared experience and most of all, shared consensus regarding values and goals. To "be In Community" this way demands authenticity achieved through dialogue and compromise.

The inward turn suggested by *Conversation 2014* is offered with full appreciation for the past efforts by non-profit organizations to solve these problems with innovative programing and enlightened management. But the social and cultural problems we are encountering today are so large and complex that honest consideration of spiritual and psychological understandings is warranted, especially given our limited success in resolving the ego disputes and turf wars that make lasting progress so difficult. Perhaps a higher level of consciousness is just what is needed to pull us out of the low places where we are currently stuck, tires spinning, and mud flying in all directions?

Much has been written about this path to wisdom or higher consciousness. Our collective understanding of the journey is contained in our sacred stories and myths. By design, these stories invite multiple perspectives, asking us to honor them in their wholeness. When we resist the urge to turn them into propaganda, they reveal important truths about ourselves and each other and the importance of authentic leadership.

In this essay, I hope to explain four qualities of wisdom that each of world's major spiritual traditions encourages us to adopt. These qualities are proven gateways to authenticity and joy. They lead to greater organizational effectiveness and a growing ability to recognize and acknowledge value in all situations. When practiced consistency, these four qualities function as internal gyroscopes enabling us to call forth life-affirming responses in ourselves and others.

Mahatma Gandhi, one of the 20th century's most admired leaders, said: "If we could change ourselves, the tendencies of the world would also change. As a man changes his own nature, so does the attitude of the world change toward him."[33] When we take these words to heart our personal and professional goals become an ongoing mission to foster change in ourselves in hopes of bringing change to others and the organizations we care about.

In Christianity, the journey to understand and model these wisdom qualities is known as servant-leadership. In Buddhism it is called the bodhisattva path; Joseph Campbell wrote about this path in the Hero with a Thousand Faces and the poetry of Rumi points to the dynamic and bright space this path leads toward. The qualities we will consider in this essay include: wisdom's invitation to embrace our fears and challenging emotions; wisdom's invitation to enter second-half-of-life thinking; wisdom's invitation to enlarge our perspective; and wisdom's invitation to embrace ambiguity.

In Thus Spoke Zarathustra, Fredrick Nietzsche said: "And there is nobody from whom I want beauty as much as from you who are powerful: let your kindness be your final self-conquest."[34] When we hear these words, a space deep inside our heart opens in response. Instinctively, we understand kindness and love are what we most need if we are to heal ourselves and each other. But how do we acquire the perspective needed for kindness and the ongoing discernment of Right Being…Wise Action…In Community?

Let's begin by considering wisdom's invitation to embrace our fears and challenging emotions. Fear influences so much of what we do and how we experience life. Fear of uncertainty and change keeps us trapped in familiar but unfulfilling situations. Fear of criticism and rejection prevents us from pursuing new ideas and fully developing our talents. Challenging emotions frighten us and cause us to contract, erecting walls to keep people and situations at bay. In our smallness, we vacillate between the poles of grasping and aversion, fervently trying to manage our experience of life. These tendencies bring suffering. They diminish our capacity for relationship and cut us off from the joyful moment-by-moment awareness that is our birthright.

Wisdom invites us to abandon these controlling habits and relate to ourselves and others in a more fulfilling way. The first step toward this playful and energetic space is to honestly

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[33](Morton)
[34](Kaufman)

connect with our feelings and experience life as it unfolds. This requires a willingness to "accept what comes" as a gift.

But connecting with powerful emotions, especially the disagreeable ones, and learning to see them as gifts is not easy. Most of us have spent a lifetime developing coping strategies to separate us from this volatile energy. Wisdom asks us to investigate our tendencies to shut down or numb out. Some of us use alcohol or drugs; others use food; many more use defensiveness or judgment as a strong shield. Excessive busyness is a common strategy whereby we attempt to outrun our uncomfortable feelings, never slowing down long enough to experience our true self.   Our culture, like all cultures, is complicit in this communal exercise of avoidance and supplies us with never-ending opportunities to escape. If fact, grasping and pushing-away is so habitual and automatic, we rarely notice these tendencies in ourselves.

As a result of this failure to connect with "our life as it occurs" and embrace our fears and challenging emotions, we do not learn the important lesson life wants to teach us: "acceptance of what comes", especially the things that scare us, is the vehicle for our transformation. This "openness to life" is the gateway to enduring stability and joy and an important step toward wisdom.

To fully appreciate wisdom's invitation to "open to our experience," it helps to think of past situations from our personal life when a willingness to embrace or deal with "what comes" or "what happened" has helped us grow. Perhaps it was the courage to finally end a destructive relationship or seek new employment. Maybe it was a few baby steps taken to develop a skill that had never been acknowledged or appreciated. Perhaps it was coming to understand that the "bad thing" that happened long ago is the source of something good. The situation in question might have led to deeper empathy and compassion or caused your path to intersect with the person who is now your best friend.

We can also apply this willingness to "welcome what comes" in our professional and organizational lives. In my work leading a multi-campus hospital development program, I am finding it helpful to slow down and connect with my emotions and fears for the future. These feelings help me identify my learning agenda.

My current fear is that I will fail in my efforts to identify and build relationships with increasing numbers of potential new donors. I am also afraid our planning has historically been weak and our program has become is too dependent on outlier gifts. Rather than run from these fears, I am trying to embrace them. We recently engaged outside counsel and completed a comprehensive planning process. We have also initiated a robust dialogue regarding process improvement, especially as it relates to major gift fundraising. These discussions have led to efforts to build a successful physician champion program leading to increased giving from grateful patients.

Several years ago my 13-year old daughter made a special gift for me. It was sculpture featuring a fearsome painted dragon encircling the world, holding on firmly with its sharp claws, head poised to spew fire. Kelsey had no understanding of the power and depth of the image she selected, but I did.

When she is older, I will teach her about Hindu and Buddhist iconography and the symbolism conveyed by dragons and mythic creatures. They adorn the gateways to Asian temples and communicate a fundamental psychological and spiritual truth. Personal transformation requires us to befriend our dragons, the situations in our life we most want to run from.

I keep this painted dragon on my desk to remind me of wisdom's never-ending call to "welcome what comes." Wisdom asks us to practice this radical acceptance every moment of our day, opening to the white heat of anger or the lonely feelings of rejection.[35] Following this path leads to an emotional flexibility and deep-seated empathy we never thought possible. These skills serve us well in our roles as leaders and agents of change, enabling us to act with greater confidence and boldness. Sometimes this confidence encourages a tender forbearance; other times it demands we act boldly, cutting off the head of the snake before it can strike.

As we progress on wisdom's path, slowly letting go of our fear and desire to grasp and push away, *wisdom invites us to enter second-half-of-life thinking*.[36] We do this by developing a greater understanding of the first-half-of life when we became "the people we are," in response to a world that both frightened and excited us.

As most of us know, we were not alone in this effort to mold ourselves. Our parents, peers and authority figures alternatively shamed and encouraged us in their effort to fashion us into images of their liking. Much of this shaping was unconscious. We internalized their voices, pushing part of ourselves into light and part into shadow, coping with personal traumas as best we could, acquiring the inner strength and practical skills needed to achieve independence. Since fear, anxiety, control and ego were always nearby, we developed patterns of helpful and off-putting behaviors.[37]

Life would truly be a sad and unfulfilling affair if we remained stuck in this first-half-of-life thinking, willing to sacrifice authentic relationships and collaborations to our ego concerns. Yet, so much of our personal and cultural life remains dominated by first-half-of-life actions and their consequences. Just pick up a newspaper or tune into your favorite news web-site for an up-to-the-minute reminder that when we, in the words of James Hollis "choose security over growth, we outrage the soul, and the soul outraged manifests in symptoms of

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[35]Brach
[36]Rhor
[37]Richo

depression, anxiety disorders, envy and jealousy of others, dependencies and so much more."[38]

Second-half-of-life-thinking values interdependence above independence; it is head below heart; power in service to love. Second-half-of-life thinking requires much soul-work on our part and can be considered a veritable "weeding of the garden" to untangle the mixed motivations, judgments and personal anxiety management systems that separate us from others and a spirit of true belonging.

This second-half-of-life designation is not so much about chronological age; it concerns spiritual orientation. Some people are in their 30s when second-half-of-life thinking emerges, others are in their 40s and 50s; and some people remain stuck in first-half-of-life thinking and behaviors well into old age, never fully relinquishing the ego's firm grip on their actions and attitudes.

Recently, a colleague shared one in a series of letters he had received from a physician who had been justly terminated from his hospital leadership position. This dismissal followed a series of ethical and fiduciary breeches and was now ancient history, having occurred almost 20 years ago. Even though the aggrieved physician is now past 80, he still feels compelled to defend his wounded ego, lashing out repeatedly at those whom he believes perpetuated the injustice. How sad that he has remained stuck in first-half-of-life thinking his entire life!

Irish poet and Hegelian philosopher John Donahue has given a helpful hint to those wishing to enter second-half-of-life thinking. He wrote "if you want to grow spiritually, identify a point of contradiction in your life. Find the threshold moments where the sides of the contradiction meet. At those times and places stay faithful to the aura and presence of that contradiction and hold its two sides gently in your embrace and ask it what it wants to teach you."[39]

This willingness to hold the paradox, to be transparent with ourselves and others, bringing our personal and institutional contradictions into the light, is the hallmark of second-half-of-life thinking. By dropping our cherished story lines and shifting our perspective we are able to be vulnerable with ourselves and others. This vulnerability is a great gift. It opens a space inside us that fosters compassion. Buddhist teacher Pema Chodron acknowledged this gift when she wrote: "Dwelling in the in-between states requires learning to contain the paradox of someone being strong and loving and also angry, uptight and stingy. In that painful moment when we don't live up to our standards, do we condemn ourselves or truly appreciate the paradox of being human?"[40]

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[38]Hollis
[39]O'Donohue
[40]Chodron

Vulnerability is increasingly being discussed as an essential attribute of leadership and overall happiness. A recent TED talk on the subject by Brene Brown went viral, generating over 4 million views. In the Gifts of Imperfection, Dr. Brown writes: "Wholehearted living is about engaging in our lives from a place of worthiness. It means cultivating the courage, compassion, and connection to wake up in the morning and think "no matter what gets done and how much is left undone, I am enough." It's going to bed at night thinking "yes I am imperfect and vulnerable and sometimes afraid, but that doesn't change the truth that I am also brave and worthy of love and belonging."[41]

Second-half-of-life thinking and acting is about bringing the truth of this essential worthiness to greater awareness in ourselves and the people we care about. It is about understanding the depth of Rumi's poetic insight when he said "Bless your wounds; they are the places where light enters your body."[42] When our speech, actions and behaviors are grounded in this inner authenticity and worth, the likelihood we will act with wisdom is greatly enhanced.

In my professional life as a philanthropic leader, one of my key responsibilities is to identify and foster generosity. While first-half-of-life people make charitable gifts, transformative giving is most often the domain of second-half-of-life people and their concerns. To connect more effectively with these special people, I am taking more risks in my one-on-one meetings, probing more deeply to uncover predominating values and their concrete expression.

This more careful listening is helping me stay focused on my aspirational goal of adding value to each and every relationship. I want to help people identify what they most want to accomplish via philanthropy and assist them in bringing more good to the world. Authentic stewardship, transparency and a renewed focus on communicating impact are essential attributes of this more mature approach to fundraising.

When we begin to move past first-half-of-life thinking, with its emphasis on security and ego-concerns, toward second-half-of-life thinking, with its emphasis on spiritual transformation, *wisdom invites us to enlarge our perspective*. This enlargement is painful and requires us to redefine our understanding of security and the meaning of life. This fundamental redefinition of meaning is what Jesus meant when he spoke about "death to self" and "opening to a more abundant life."[43]

In the ego-dominated first-half-of-life world, our anxiety is relieved by possessing or controlling people, situations and things. Vulnerability is feared and the goal of life is often reduced to acquisition and consumption. To hold this narrow perspective invites spiritual malaise and growing isolation.

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[41]Brown
[42]Barks
[43]Rhor, *The Naked Now: Learning to See as the Mystics See*s

Our wisdom traditions warn against becoming stuck in this inherently unsatisfying experience of life. They encourage individual and societal transformation, advocating a deeper connection with ourselves, each other and the world around us. Wisdom encourages this larger view of life and emphasizes the interconnectedness of all things.[44]

But what path will lead us to this more expansive view? How do we acquire the mature perspective needed to move beyond individualism and our ego-centric viewpoints? Each of the world's spiritual traditions has affirmed three paths leading to an expansive world view. These paths can be summarized as great love, great suffering and great silence.

To our modern mind, the most enigmatic of these paths is the reference to great silence. As modern people, we have almost no use for silence and take every opportunity to fill our days with sound. Even during prayer, those moments when we consciously try to connect with something larger and more expansive, our consciousness becomes filled with words, either spoken or repeated inside our head.

Christian mystic Thomas Merton's great contribution to western spirituality was an almost single-handed effort to re-introduce the path of great silence to the Christian tradition. Eastern spirituality, with its emphasis on meditation, always maintained a healthy perspective on silence and, fortunately for us, the past fifty years bears witness to great sharing between east and west.

The affirmation of great silence as an essential path is shared by other traditions too. I recently came across a heart-wrenching passage written by Chief Luther Standing Bear, a Native American Indian who experienced the destruction of his culture and cherished way of life. He wrote: "The man who sat on the ground in his tipi meditating on life and its meaning, accepting the kinship of all creatures and acknowledging unity with the universe of things was infusing into his being the true essence of civilization. And when native man left off this form of development, his humanization was retarded in growth."[45]

Chief Luther Standing Bear's lament should be an encouragement to us all to seek enlarged perspective with greater zeal and fidelity. But silence still remains a hard sell. To some people sitting quietly, attending the breath, grounding oneself in the moment-by-moment experience of the body, letting the mind grow still and releasing thoughts as they arise is torture to be avoided at all costs.

While it is difficult to enter silence for any length of time, the value of meditation or contemplative prayer is undeniable. It creates greater acceptance and spaciousness in our relationship to ourselves and the people and situations we encounter. Meditation fosters the helpful ability to pause in our response to the world, enabling us to connect with our highest aspirations and make wiser, more life-affirming choices.

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[44]Tolle
[45]McLuhan

Wisdom's invitation to enlarge perspective has a number of pressing implications for my professional life, especially during this time of systemic change. Health system leaders are increasingly being asked to realign services to ensure that "value to the patient" is the overarching goal.[46]   The coming focus on bundled payments, readmission rates, and population health management will also influence our traditional brick and mortal fundraising priorities.

In the future, hospitals may be called upon to lead community-wide wellness and prevention efforts and other projects the community feels add value and reflect their non-profit mission. Increased fundraising activity for medical and nursing education is anticipated, as well as an expanded focus on improving access for marginal populations. Support for robust care coordination and life enhancing services like hospice is predicted. We are also likely to see more fundraising initiatives to acquire technology whose purchase is jeopardized by decreases in operating capital.

As we enlarge our perspective, making deeper connections and fostering more value-oriented approaches, additional qualities of wisdom make themselves known, including *wisdom's invitation to embrace ambiguity*.

First-half-of-life thinking does not understand the transformative power of ambiguity.   It delights in absolutes, using them to calm our fearful egos, preventing us from gazing too deep into the abyss of uncertainty.   Rules, cherished understandings, predictability and "the true facts" as we perceive them are woven into firm ground to stand on. We live comfortably in this space, but at great cost.   We are cut off from a vast openness and much of the vitality and joy of our life is drained away.

Spiritual maturity requires us to shatter our containers of certainty again and again, exchanging predictability for mystery as we accept the invitation to "live life as a river flows, carried by the surprise of its unfolding."[47] When we honor life in this way, wisdom's transformative energy is released and the payoff is substantial: we acquire a newfound trust in life and a confidence in our ability to flourish in all situations.

In *What Matters Most: Living a More Considered Life* Jungian analyst James Hollis said it well when he wrote: "Certainty begets stagnation, but ambiguity pulls us deeper into life. Unchallenged conviction begets rigidity, which begets regression; but ambiguity opens us to discovery, complexity and therefore growth. The health of our culture and the magnitude of our personal journeys require that we learn to tolerate ambiguity in service to a larger life."[48]

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[46]Lee
[47]O'Donohue
[48]Hollis

The great sadness of the modern world and perhaps all of world history is culture's inevitable hijacking of religious tradition. We continually bind-up wisdom's transformative power, tamping it down to protect first-half-of life concerns. If you have any doubts about this, just consider the many times religious leaders have been complicit in protecting the church's cultural position at the expense of justice. It is also why there is such great enthusiasm for religious leaders who are perceived as second-half-of-life people advocating for second-half-of-life concerns. The growing popularity of Pope Francis speaks to this hunger for authentic leadership.

Deep down, our religious traditions understand culture's power to hijack them and a collection of enigmatic sayings has emerged to guard against complacency. Contemplating these phrases is painful, until we realize their purpose is to help exchange our certainty in favor of transformation.

<blockquote>

"If you meet the Buddha, kill him." - *Vajra Sutra*

"The Tao that can be named is not the Tao." - *Lao Tse*

"God is the God who appears when God has disappeared." - *Paul Tillich*[49]

</blockquote>

As leaders, when we accept wisdom's call to embrace ambiguity our ability to tolerate the ups and downs of volatile business cycles and the inevitable personal and professional setbacks is greatly enhanced. We develop greater confidence in our instincts and willingness to abandon outdated road maps. We also find that when stripped of our fear of uncertainty, we become willing agents of change or, as the leader of a large and complex business recently said to me: Leaders are called to be the rod who stirs the drink.

I am slowly learning to harness the power of ambiguity in my professional life. It is helping me investigate and let go of past certainties and cherished fundraising approaches that may no longer be working.

Some of my immediate learning is an effort to understand the positives and negatives of batch thinking as it relates to my efforts to build stronger, more dynamic relationships with benefactors and potential partners. What opportunities are lost when I fall into the maul of special event management or persuade myself that broad-based communication efforts will call forth generosity? How much time have I wasted on connecting strategies that are hit or miss at best? Are my interactions with people truly relational or do I drift toward a narrow transactional focus more frequently than I would like to admit? My growing tolerance for ambiguity has given me the courage to "stir the drink" and ask these questions with greater honesty.

For those of us working in healthcare, the coming decade will offer numerous opportunities to reinvent ourselves as our industry undergoes the most comprehensive transformation in

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[49]Tillich

its history.   The journey before us is akin to rebuilding a speeding car without removing our foot from the gas, even though we suspect the car's driver is blindfolded.

I hope these reflections have been helpful in advancing us toward a shared understanding of leadership and the wisdom traditions. Their ancient and powerful insights can help us become better people and more effective leaders who willingly embrace our fears and challenging emotions; enter second-half-of-life thinking; enlarge our perspective, and embrace ambiguity.

If we are struggling to understand our leadership agenda, either personally or professionally, the most helpful thing we can do is to identify our contradictions, asking gently, but firmly "What do they want to teach us?" For these contradictions reflect us, better than any mirror can, pointing toward our highest aspirations and our basest fears. We should approach them with a sense of awe and reverence for what they can teach us about "who we are" and "who we want to become."

As a hospital executive, I am fascinated by the contradictions that have been revealed by the healthcare debate. The depth of emotion on both sides of this issue should cause us to pause and ask: "What is really going on here? Is this just a debate over the implementation of the Affordable Care Act or is something larger taking place?"

Answering these questions honestly is difficult given our capacity for collective self-deception and self-aggrandizement. Wisdom in her role as "the voice of the Lord that strips the forest bare" understands this better than we do. She invites us to let the complexity of our stories reveal the contradictions in our personal and collective psyches, freeing us from the grip of self-deception.

The stories exposing our healthcare system's mixed motivations and confused values unfold every day. The main characters are our mothers and fathers, our husbands, wives and children, and our best friends. Some stories involve triumph and the heroic use of medical skill and technology to restore life; others reveal this same technology being used to prolong suffering and death. Some stories demonstrate compassion and great tenderness; others reveal insensitivity and error leading to harm. There are stories of intentional overtreatment for economic gain and stories of care denied due to poverty or prejudice. There are stories of frivolous litigation, of runaway juries, of justified malpractice awards and travesties of justice so severe the careers of good men and woman have been destroyed in an effort to account for the unaccountable capriciousness of life.

Each one of these stories functions like Indra's net, reflecting the full measure of our humanity, with its infinite capacity for both generosity and greed. They reveal our defining tensions and never-ending struggle to understand what matters most:

- We value inclusiveness and diversity, but fail to make a place at the healthcare table for everyone;

- We value health, but define well-being too narrowly, misaligning our resources and failing to encourage personal responsibility and prevention;

- We value economic competition and the innovation it fosters, but we do not understand how to reduce waste and avoid needless duplication of scarce resources;

- We value life, but our fear of death is so great we have not yet developed the cultural wisdom to help each other understand when "enough is enough," stewarding precious resources and enabling the heart to complete its noble journey homeward.

Wisdom understands all of this and acknowledges our "Jacob wrestling with the angel struggle"[50] to negotiate the compromises of life. This journey to life's far shore is our personal odyssey; it is what defines us as human beings and leaders. And like the main character of Homer's great epic, wisdom invites us to place our individuality and personal challenges in the context of the hero's journey toward wisdom and a growing love for the world.

Near the end of the *Odyssey*, one of the western world's oldest and most influential stories, the prophet Tiresias gives Odysseus one final task. He is commanded to pick up an oar from his ship and walk away from the sea until he meets a traveler who mistakes the oar for a winnowing shovel. When that happens, Odysseus is to offer sacrifice to the gods, marking the end of his 20-year journey, and return to Ithaca to reign in peace and prosperity.[51]

In the ancient world, the winnowing shovel was the symbol of discernment, a tool for separating wheat from chaff. Like Odysseus, the leader's journey is not complete until we can successfully work with our experience in such a way that it enables us to discern imperishable value in our self, others and every circumstance of life.[52]

This continuous uncovering or sifting for value is what our greatest spiritual teachers mean when they say "the path to wisdom lies in choosing to love the world." The love they refer to is not the romanticized or sentimental love of Hollywood or the blissed-out saccharine love of popular culture. The love we are pointing toward is a rare and precious thing; it is born when we can sit in the flames of our experience and find the courage to welcome all people and situations in their wholeness, understanding that life never wastes an opportunity to invite growth, continually encouraging us to participate in the unfolding of our uniqueness.[53]

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[50]Abrahamsky
[51]Home
[52]Luke
[53]Merton, *Choosing to Love the World*

This transformative love is at the heart of all authentic community; it is a yielding that acknowledges the rub exists for the polishing and without sand the oyster would never produce the pearl. This view of life is *Right Being…Wise Action…In Community!*[54]

Ride your horse along the edge

of the sword

Hide yourself in the middle

of the flames

Blossoms of the fruit tree will

bloom in the fire

The sun rises in the evening

Thomas Merton[55]

Out beyond ideas of rightdoing and wrongdoing,

there is a field. I will meet you there.

When the soul lies down in that grass,

the world is too full to talk about.

Ideas, language, even the phrase each other

doesn't make any sense

Rumi[56]

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[54]Ray
[55]Merton, *Zen and the Birds of Appetite*

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[56]Barks

John Swanholm

Vice President & Executive Director, HealthEast Care System

John Swanholm, Vice President & Executive Director, has been with HealthEast Foundation since 2003. John serves on the executive leadership team for HealthEast Care System, the largest health care provider in the Twin Cities' East Metro area. He previously served as System Director of Philanthropy and Director of Capital Campaigns for HealthEast Foundation. John and his team are responsible for all fundraising and grant making functions of HealthEast through the Foundation.

Prior to joining HealthEast, John served as Vice President for a Twin Cities-based fund raising consulting firm, where he directed national client services and managed a team of consultants.

John received a Master of Arts degree in Philanthropy and Development from St. Mary's University and a Bachelor of Science degree in Business Administration from Marquette University. John is a Certified Fund Raising Executive (CFRE) and serves in a leadership role with the Association for Healthcare Philanthropy in addition to membership in several professional and community organizations.

This is John's first *GHC Conversation*.

gary**hubbell** consulting

Brothers Who and Transitional Whats?

John Swanholm

A Case Study in Right Being…Wise Action…In Community

5:52 pm, Friday, Feb. 8, 2013:

I was finally getting some fresh air after a rigorous and challenging week. It was the first week of our engagement with Gary Hubbell Consulting. "Dad, I think that's your phone ringing," said my 8-year-old daughter. We were bundled up and skating at the local rink. I unzipped my coat, fumbled around and retrieved my phone from the layers of clothing. The name "Gary Hubbell" appeared but I was too late to answer. Or did I choose not to answer? "Who was it?" inquired my daughter. "Oh, no big deal," I responded with sarcasm, "I just spent two days with the Brothers Hubbell. They want me and my work team to become transformational futurists." "Brothers who and transitional whats?" she asked.

August 23, 1987:

St. Paul East Metro hospitals with Catholic, Baptist, Swedish Lutheran and German Lutheran heritages merge to form HealthEast. The declared theme at the time was "Swim together or sink alone." While realistic, it certainly was not an inspiring vision.

HealthEast Foundation also is formed through the merger of the four foundations. The Foundation evolves into a standard development operation with a focus on events, major gifts and capital campaigns. The bylaws state that all funds raised must be granted within HealthEast Care System. "Transactional philanthropy" continues as the Foundation "takes the order" from the system and works to fill it. Buildings get built and programs are funded in a successful manner for many years and benefit HealthEast.

8:05 am, Wednesday, May 22, 2013:

Here I stand with the system CEO, in front of an impressive group of 40 community leaders from large business, small business, social services, government and other sectors making up our community. How did we get here?

The Affordable Care Act, our formation of an Accountable Care Organization and the focus on Population Health Management were completely reshaping healthcare delivery. In

addition to this significant shift for HealthEast, we also realized the need for a radical shift from our former Foundation model based on conventional philanthropy. While sufficient up to this point, we believe it is not sustainable in this new world of healthcare and philanthropy.

A few months prior, our CEO had challenged HealthEast with a new vision of "optimal health and well-being for our patients, our communities and ourselves." Our leadership team boldly declared our shift to health and well-being and specifically called out our communities in addition to our patients and ourselves.

And just as boldly (or naively), the Foundation asked, "so what does this really mean?" The question was perhaps risky as it put a bit of tarnish on the freshly polished vision statement. As expected and hoped for, the question was well received and we were asked to help her figure it out. Enter Gary Hubbell Consulting.

Before assembling this group of 40, we engaged smaller cohorts of community leaders to help us, through a collective community lens, chart the last 30 years of our health and well-being ecosystem. We conducted research, interviews and considered our "current reality" with our "desired future reality." The question became, how do we "disturb" a whole community toward sustained optimal health and well-being? The Foundation and HealthEast embraced scenario planning as a tool to reimagine the future, and that's what we were here to do.

After the scenario development we reassembled the group a few months later to develop and monitor the signals of change. We asked the question, "What signposts indicate our scenarios may be emerging?" A short while later, we inventoried and mapped the existing East Metro well-being community assets through a complex social network analysis software program.

All of this led to adoption of a three-year Foundation strategic plan which includes new metrics and structure for staff along with a re-engaged Board of Directors currently developing new roles, structure and goals.

The approach has spread to the system, with senior leadership and the system board adopting the Neighborhood Strategy introduced by the Foundation.

3:32 pm, Thursday, January 30, 2014
Holy smokes (or perhaps another word was used), I need to get my essay finished and off to Gary. So now I have to figure out what this previous prattle has to do with *Right Being . . . Wise Action . . . In Community*. Quite a bit, I'm coming to find.

Right Being: Historically, healthcare has focused on our internal operations along with doing things to the community. It's a tough sector and our employees are committed to a mission and making extraordinary sacrifices. We know what we're doing. We're smart. We're big. We have power. This sector is extraordinarily complex and maybe the rest of the

community just doesn't get it. We were also incented in a much different way, being reimbursed for sick-care and driving volume to the hospitals. Our being has been as fixers, not people and teams committed to disturbing a community to optimal health and well-being.

Today, we are in the early stages of being rewarded for keeping people out of the hospital. We are incented to focus on the wellness of the population and communities we serve. These incentives, aligned and implemented correctly, are helping to evolve Right Being.

This was a major challenge in our transformation as we engaged the community to rebalance the Foundation to "Right Being." We initially continued to steer our discussions back to healthcare. Several times I caught myself thinking "why are we talking with these people about crime and poverty and bike paths and food deserts? And how does this fit with our work?" We are consistently tempted with the urge to go solve some problems and fix things. We are now challenged to "be" in a different way. We need constant reminders and coaching to see and recognize the community as a whole and our role as a community asset. Engaging in Right Being and being/doing with the community, instead of to the community. We are just at the inception of living into "Right Being" but the transformation is underway and our commitment is declared.

We also must resist the temptation to force our theory of change on other individuals or organizations. We are now so enlightened and forward thinking, right! And on top of that, everything is continually changing, so we can never master or control the change anyway. Right Being reminds us to help others live into this perpetually evolving vision and to have patience.

This type of commitment inherently involves risk and can be difficult to build into the culture of a large, busy and traditional organization. Early on our team freed ourselves from this fear by pledging to act with resolve and without apology. Innovation, experimentation, wise risk and intentional diversity intersect with each strategy as we grow into Right Being.

Wise Action: A wider and collective community lens has allowed us to understand our potential role to address troubling social issues and their related impacts on health and well-being. At times we will take the role of convener and leader; at times follower; at times funder; and at times no role at all. That's OK.

Collective action and collaboration with the community, while it exists in small pockets or specific projects, is not a cultural competency in our organization.

Through the engagement of our community and our new lens, we are realizing that we possess the resources to have impact in collective action with the community. We are harnessing all assets of the enterprise, beyond financial, including human and intellectual capital.

We are hardwired to view some community assets as competitors and found through our planning process that several other sectors are struggling with the same issues. Our calling to Wise Action is an iterative process. Not everyone will join us on this journey, and that is a fact we are accepting.

In Community: Our authentic approach and embedding our enterprise into the community is slowly changing the dialogue in our community. Internally we heard early statements of certain areas being "in charge" of the community. It is a struggle for us internally to understand that no one owns the community (or rather, we all own the community), and it will continue to be a challenge with our ongoing community engagement initiatives.

In the past, our grant making was 100% internally focused. A goal in our strategic plan is to invest 50% of our funding in the community. This is a dramatic shift and opens the opportunity to partner with other community organizations for innovative funding. Some community organizations are able to tackle issues at a grassroots level and already have the connections and organization. We need to consider our assets and our role as a health and well-being enterprise. Perhaps we can partner and provide resources such as grant writing and reporting capacity. The case for support or investment is being broadened and needles will be moved through a transformational approach versus our traditional transactional approach. It is obvious that this is being done In Community.

4:43 pm, Saturday, Feb. 1
Sent this off to Gary. I wish I had his facility with words and speech, but the bright side is that my comments are much briefer.

Yes, I am committed to my journey of developing into a transformational futurist. I may even put it on my business card. And I earnestly answer all of Gary's phone calls now, too.

Kim Scott

President and CEO, Trillium Family Service

Kim Scott is responsible for providing executive leadership for all Trillium program operations. He provides direct supervision to the Medical Director, the Director of Clinical Quality, the Chief External Affairs Officer, the Chief Administrative Officer, and the Executive Director of Human Resources.

Kim provides leadership in the development of organizational policy and procedure, compliance with national accrediting bodies, and program and business development activities.

Kim also provides statewide leadership in the development of intensive treatment services that are family focused and integrated with local communities and planning structures. He serves on the Advisory Board of the American Association of Children's Residential Centers, on the Strategic Planning Committee of the National Alliance of Children and Families, and has been invited to participate in the Building Bridges Summit sponsored by SAMHSA. He is actively involved with the Oregon Alliance of Children's Programs.

Prior to joining Trillium Family Services, Kim served as Associate Director of the Children's Farm Home in Corvallis, Oregon. In this role, he was responsible for directing all the residential care and treatment services operations and supervised coordinators responsible for managing residential, community-based and clinical services program operations.

Kim started his career as a childcare worker at Waverly Children's Home in 1978 and he became the Residential Services Coordinator in 1983. In 1985, he moved to Alaska, where he served as Detention Unit Leader for the Department of Health and Social Services in Juneau and as youth counselor at Johnson Youth Center, also in Juneau, Alaska.

Kim has presented at conferences for the Child Welfare League of America (CWLA), Oregon's Children & Adolescent Residential Psychiatric Programs (CHARPP), the Council on Accreditation (COA), and the University of Southern Florida's Research & Best Practice conference and has provided quality assurance, accreditation and electronic record consultation for mental health agencies in Oregon and Alaska.

Kim received a Bachelor of Arts degree in Counseling Education from Columbia Christian College in 1980. He received a Masters in Public Administration from the University of Alaska Southeast in August 1995.

This is Kim's second *GHC Conversation*.

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Being Leaders…In a New Way

Kim Scott

"Acting Within Community"

Last year I was fortunate enough to be invited by Gary Hubbell to *Conversation 2013.* The meeting focused on the concept of resilience from the personal, organizational and broader community perspectives. I must not have done anything too embarrassing because Gary invited me back to GHC *Conversation 2014*, which is focusing on "Right Being…Wise Action…In Community"

For me *Conversation 2013* was a significant experience and a call to action to re-awaken previous commitments to being intentional in thought, action and deed. By taking a deep dive, as Gary and Ken Hubbell might say, in conversation and with support from colleagues, I was able to see that resilience might require courageous decisions. In a moment of clarity, I realized that resilience in its deepest form, that being, true social impact, may require me to make personal decisions on behalf of the organization and the community that could lead to scenarios where I might not be part of the solution. In a time of resource scarcity, increased complexity, and a universal call for collaboration and consolidation, taking the "high-road" might mean working myself out of a job that I am most passionate about. I shared these thoughts with 2013 participants and voiced that I hoped I was strong enough to make decisions and support actions that led to stronger community resilience regardless of potential personal consequences. This concept of subordinating personal goals or needs for a higher purpose seems to me a fundamental cornerstone of "Right Being" and without it I don't believe we can get to Wise Action in Community.

By design, I refer to my *Conversation 2013* experience as a re-awakening of **previous** commitments that focused on being more intentional. I believe all of us in our youth in one way or another understand the possibility of "changing the world" and that is our intention as we enter the workforce. Only after years of experience, upward mobility, and increased responsibility, is this innate understanding slowly drummed out of us. In essence, we give in to external pressures or "realities" and most of us become more focused on personal and

organizational success and what started out as a transformational process becomes more transactional in nature.

In a conversation with Ken Hubbell, I described to him my dream for the organization I represent (Trillium Family Services in Oregon), a dream that would move the organization to deeper community involvement and engagement--becoming a catalyst for building stronger communities. Ken's response is one that I have cherished and used many times and it is beautiful in its simplicity. He said, "It sounds like you want to move from acting *upon* a community to acting *within* a community." This concept of acting within a community and not upon a community is foundational in how I think about "*Right Being…Wise Action…In Community*."

When we are truly acting and accepting our place within a community we can't help but see many of the gaps that exist in our social fabric. Schools, neighborhoods, and support systems in one way or another all seem to be eroding before our very eyes. The problems seem almost impossible to address and they probably are if we approach them from a myopic perspective. We tend to think about and value interventions that are highly specialized or technical in nature but the problems we face are more about people, beliefs, and core values and these problems may require a different set of solutions. These solutions must be collective in nature and will require skills and a way of being that focuses on opportunity mining, dreaming, engaging, learning, visioning, and leading.

Opportunity Mining

I'm not sure if I have heard this phrase before or if it came to me while sleeping but it seems to describe what I think is a critical skill for navigating complexity and times of great challenge. Not that I have done any mining, but my assumption is that there is a lot of hard work involved--digging, drilling, blasting and sifting through all kinds of earth and debris– before any nuggets, precious metals, or treasures are found. But for those willing to engage uncertainty and continue the hard work there is the potential for great reward. I think the same is true for the work required in bringing about deep social impact. Communities, individuals, organizations and leaders, will have to sort through all kinds of problems and challenges and search for those rare opportunities that bring people together and create alignment around a shared way of being. Much like mining, this work will require us to embrace uncertainty and risk while displaying the patience to invest in long term impact rather than quick fix solutions that bring about short term gratification. Another aspect of this type of work is the ability to stay focused on the long view and sort out what are true opportunities versus distractions that may simply be "fools gold."

Dreaming

We should dream more about the kind of impact we want to see in our community and world. We should spend more time examining what is possible. Beyond my human and social services world I see overwhelming evidence that other industries spend considerable time dreaming and envisioning possibilities; so much so that we take for granted

technological advancements such as smart phones, personal computers, and other devices that can pull movies, books, and information from thin air. However, seeing the possibilities is not always easy work and historically there are examples of some very smart individuals who missed the boat entirely. The following are just a few examples:[57]

> *"The wireless music box has no imaginable commercial value. Who would pay for a message sent to nobody in particular?"*
> —Heads of RCA in response to David Sarnoff's pitch for investment in radio

> *"TV will never be a serious competitor for radio because people must sit and keep their eyes glued on a screen; the average American family hasn't the time for it."*
> —The New York Times, 1939

> *"What use could this company make of an electrical toy?"*
> —William Orton, President, Western Union when asked by Alexander Graham Bell to buy his struggling telephone company for $100,000

> *"Who the hell wants to hear actors talk?"*
> —Harry M. Warner, Warner Bros Pictures 1927

> *"There is no reason for any individual to have a computer in their home."*
> —Kenneth Olson, founder Digital Equipment Corp. 1977

> *"There's no chance that the iPhone is going to get any significant market share. No chance."*
> —Steve Ballmer, CEO, Microsoft April 30, 2007

Aside from the obvious consequences of failing to grasp possibilities or unleashing our imagination, giving voice to our dreams and examining possibilities may be the most important work we can do. In my lifetime every huge social shift or impact started with the articulation of a better world and a call to action. Think of Dr. Martin Luther King and his "I have a Dream" speech or President Kennedy's inspirational challenge to, "Ask not what your country can do for you, but what you can do for your country." These powerful words are more than just speeches or mantras, they are calls to action by individuals who took risks and dared to dream and envision a different way of being.

Engaging
Do we have the courage to discard practices, methods, behaviors and earlier learnings, that we know really don't work, and to be open to engaging people, perspectives, ideas, and new ways of thinking. Are we ready to engage in difficult conversations- the kind of conversations that will lead to new thinking about old problems.

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[57]From a presentation by Dennis Morrison. 1-14-14, Netsmart Technologies, At The Speed Of Thought: The Role Of Disruptive Innovation In Behavioral Health - One Year Later,
http://www.openminds.com/library/102513tiidisruptiveinnovation.htm

Engaging individuals, groups, and our community and world at a deeper and more significant level requires us to seek understanding while postponing judgment. In the community building context it is about our ability to understand each other's stories and circumstances in such a way that leads to inclusion, investment, support, encouragement, inspiration, empathy, and action. If we are truly engaged, how can we not respond to such deep rooted problems as poverty, social injustice, inequity, and all of the "isms" we experience in our communities.

Learning

At a recent conference I heard a speaker reference the complex world we live in and the need to be constantly engaged in adapting and learning in order to stay relevant. One great quote from his presentation was "Our world going forward is not for the learned but for the learners." I think the message here is pretty clear—for those who think they have all the answers, the future might hold some bleak possibilities. Think about the daily advances in science and technology or social advances, such as national healthcare transformation. We live in an incredible time of learning opportunity and broad sweeping change. Do we have the fortitude and foresight to embrace disequilibrium as a catalyst for learning and innovation or will we be incapacitated by fear or the need to "hunker down" in a perceived state of comfort and stability.

Learning should not be limited to adapting to only what's new but expanded to include the rethinking or re-imagining of historical solutions or ways of doing things--in essence, bringing about disruption. The Harvard Business Review recently published an article about "Reframers." People who are reframers, radically shift the perspective of their world to conjure up disruptive innovations that re-write the rules. From a constructionist perspective, reframers show the power of asking "why not" rather than accepting present paradigms as truth. The article focuses on Indra Nooyi, CEO of PepsiCo, as one example of a reframer. In her role as CEO, she is reframing PepsiCo's business paradigm from "fun for you" products to "good for you products." According to the article she is borrowing and building on a concept from Ayurveda (India's 5,000 year old traditional medicine system) which states that "food is medicine and medicine is food." With brands such as Tropicana and Quaker, Nooyi plans to have revenues from these products increase from $10 billion presently to $30 billion by 2020.[58] Our capacity to impact community will only be limited by our inability to imagine a different way of being. If we commit to being the learners and not the learned and if we can master the ability to reframe, question, disrupt and innovate, Wise Action must follow.

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[58]Navi Radjou, Jaideep Prabhu, Prasad Kaipa, Simone Ahuja. July 13, 2010. How Reframers Unleash Innovation in Their Companies (And Beyond), in HBR Blog Network, downloaded January 14, 2014 from: http://blogs.hbr.org/2010/07/how-reframers-are-unleashing-a/

Visioning

Purposefully creating a narrative about what our world will look like out on the horizon is a key element in constructing our future way of being. The narrative will happen anyway as each day we are co-authors of the stories that take place around us. Sometimes this process is all too random and we simply wait for whatever is going to happen. Creating and articulating a collective vision is complex purpose-driven work that clearly sets the course for a desired state and a better way of being, but it is also about being intentional in our daily lives. As Gandhi said "be the change you envision."

The complexity of the process gets multiplied when you add the word "collective" to vision. How do we ensure that the vision we are pursuing is truly embraced by the broader community? As a human service professional, you would think that the catalytic power of inclusion, convening and listening would not be lost on me, but it is only in the last couple of years that I have come to understand and value just how critical these processes are. Maybe this lack of understanding goes back to my conversation with Ken and his statement about moving from "acting upon a community." From my perspective, a state of not being "withIn Community" leads to isolated visions, decisions, and solutions that are in the best of interest of something or someone from the perspective of a single individual or a single organization. A critical role we can play in the visioning work ahead will be in convening forums that bring diverse groups of people together to conceptualize a future that captures our best thinking and our hopes and dreams in such a way that creates passion, alignment, and collective action.

Leading

Ultimately leadership is a about a willingness to organize, support, and sometime discover the good will and intentions of others in the achievement of goals (and hopefully) toward higher purposes. From my own experience, effective leaders strike an emotional chord that makes me want to perform better and ultimately to be a better person. I think this emotional chord comes less from charisma than it does courage. Charismatic leaders seem like a comet flashing across the sky for a short while before burning out. Courageous leadership is more about a sustained effort over time to "do the right thing" regardless of personal consequences or disruption of the status quo. Again, from my personal experience, the strong leaders I've witnessed were not always the best managers, making me think of the old adage "Managers do things right and leaders do the right thing."

The strong leaders that I have spoken to often see their roles as stewards who are responsible for capital or resources that are precious. This stewardship does not diminish their responsibility or enthusiasm as change agents but underscores the importance of the thoughtful, and intentional adaptive work required to keep their organizations embedded within the community and at the forefront of social impact. I recently had the opportunity to hear Don Berwick, former head of Center for Medicaid/Medicare Services (CMS), speak at a conference. During his presentation he shared a quote from the Native American philosophy which states "we do not inherit this earth, we borrow it from our children." I

think this philosophy is consistent with the type of leadership we need moving forward, leadership that takes into account the "long view" and embraces the hard work in understanding the potential future impact of today's decisions.

I have always enjoyed working with and for optimists. If the work place, or our very lives, only focus on problems and what isn't right or what isn't working, then a serious "reframing" is needed. Leaders who can envision possibilities and who are confident that constraints are just exciting challenges attract people. Their positive attitude is contagious. Optimism fans the flames of creativity and focuses collective work on what can be, not what won't work. This is a critical way of being when you consider that future leadership effectiveness may very well be measured by the abilities to collaborate and partner effectively. I'm quite sure I want to work with people and leaders who know that their thoughts, actions and deeds make a difference in the world around them.

Effective leaders have voracious appetites for learning and continuous development. Not just their own, but they feel strongly enough about it that they ensure that their organizations become environments where learning is constantly occurring. Leaders who convey a willingness to learn and share set the tone for organizational cultures that become incubators for conversation, healthy conflict and resolution, innovation, and effective relationships.

Conclusion

Our society is at an incredible tipping point, where the optimist in me says incredible things will happen. More and more I see evidence of people caring in new ways. As a child of the sixties, I have seen first-hand the change in behavior and view of critical issues such as the environment, civil rights, and how to operate business responsibly. Today young and old alike seem more focused on the health of the planet and preservation of natural resources. We have a long way to go on civil rights but the battle is being waged and most people still hold to Dr. King's dream of a better world. There are businesses that embrace social responsibility with a focus on people, planet and then profit. These are the beginning waves of what needs to become a tsunami of social change. I'm excited because we get to be at the forefront of this incredible time and the fact that we are coming together in conversation is the start of a narrative that will have a profound impact on those who desire to make it so. To borrow from chaos theory, I hope the change in our minds and hearts is akin to the butterfly in Hong Kong that unleashes a tornado in Texas. Not that I want a tornado in Texas per se.

Craig McGarry

VP University Relations, Briar Cliff University

A California transplant, Craig has spent most of his adult life in the upper Midwest and Rockies. He is a recovering banker that has changed careers after unsuccessfully retiring. He presently serves as Vice President for University Relations for Briar Cliff University, his undergraduate alma mater. Not completely weaned from banking, he also manages a $100MM trust department for a Native American owned bank.
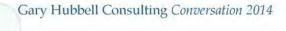
An attorney by education, Craig spent most of his career leading turnaround and reinvention efforts for trust and investment groups within the banking industry.

He has turned an avocation during his business career into a vocation after retirement. He invested a significant portion of his community service work in boards with a focus on kids and education. He has served on the boards of both his undergraduate and graduate almae matres. He also served as National Alumni Board Chair for Creighton University, where he attended law school.

Craig and his wife of 43 years are the parents of six children with 14 grandchildren.

This is Craig's first *GHC Conversation.*

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Competition as a Gift

Craig McGarry

Right thinking requires us to believe that cooperation is superior to competition. Or does it? While growing up, most of us were taught that it is critical to cooperate to get things accomplished.

"Can't you get along with your sister/brother? "

There is considerable logic to this admonition in support of cooperation. Literature suggests that in social groups where there is broadly experienced and shared satisfaction there are several common characteristics. It is the combination of effective social ties between group members coupled with significant levels of cooperation that are the two most common characteristics. But, recent research has also found that a reasonable level of self-interest can actually encourage a balance in which cooperation and grouping flourish and societal cohesion prevails. (http://phys.org/news/2011-07-cooperation-competition-greed)

So, what does this exercise of self-interest or competition mean for our work? It would be a natural reaction for any entity to view a crosstown rival as an enemy. In the case of a university, every student a competitor recruits is a threat to your survival. If they recruit a football player, it means one less football player for you to recruit. If they recruit a music student, it's one less music student for you to recruit. In an environment in which the population of traditional college-age students is shrinking, this is a significant threat. In any setting, if a competitor prices a product or service at less than what you need to breakeven on that same product or service, they threaten the very existence of your competing product or service. From one perspective, it would be easy to feel that everything a competitor does is driven by evil motives, and likely aimed at you.

For those competing for grant dollars, a hypothetical discussion with a grant-making entity could bring the issue into even sharper focus.

"We believe that the way for us to get the most out of our grant investment is to ask you to collaborate with your competitor. Can you figure out ways in which you could work together to accomplish goals and have it require a single investment, not competing

investments in both of your institutions. We believe that it will insure that we don't compete against ourselves with our investments."

Could you forget your displeasure with your competitor for long enough to work together and apply for the grant? Would you simply say you didn't want that source of funding anyway and go somewhere else for the funding? The granting agency "………can't possibly understand what it's like to compete in the real world. How could they possibly expect us to team-up with our rival? How could we possibly be expected to cooperate with somebody who would be happier, and likely more successful, with us eliminated as a competitor?"

This discussion poses a couple questions. The first is whether our constituents are better off for the existence of competition? This first question can be explored by looking at both the impact of competition on an organization and also in the overall impact of competition on donations. The second question asked is how do you model behavior for those that look to you as a mentor? What does the next generation of leaders deserve in modeled behavior?

As to the first issue, it is frequently said that nonprofits are not businesses. Embracing that saw entails significant peril. Nonprofits acquire and use resources to create and provide goods and services for communities and customers. A desire to operate above the mundane fray of the business world does not reconcile with reality. Many nonprofits operate in a world in which competitors, including some of whom are for-profit, operate with the same goals of educating students, caring for the ill, providing shelter for the elderly and providing other needed services or products.

Unfortunately for some, the nonprofit badge of honor means there is no owner demanding efficiency, effectiveness and something left over to cover the costs of capital at the end of the day. While there might not be demands of shareholders to answer to, surely the demands of the marketplace ought to require the use of resources to accomplish the mission and optimize the benefit for those served. Stakeholders are entitled to efforts that optimize success to the extent that the marketplace, the mission and the law allow.

All of the tools that are regularly used by successful for-profit organizations could and should be employed by nonprofits. These tools and efforts should include planning and organizing, working to take advantage of market niches, downsizing or rightsizing to match need, consolidating efforts with others, diversifying revenue sources, investing in training to strengthen staff and potentially even going out of business. (How Nonprofit Organizations Fight Off Competition, Barry D. Friedman, Ph.D., 2008) No organization has a right to be in business simply because they have existed for some period of time. The ability to provide a product or service and be self-sustaining may be the best yardstick. For discriminating donors that measure is frequently taken using tools like Charitable Navigator.

In the opinions of some, nonprofits should be insulated from the pressures of competing in the marketplace because there is no need to generate a profit. As long as their donations

and other resources hold out, they can continue to compete for customers regardless of their efficiency. I believe that it is competition that pushes us to be more efficient and effective with our resources and more innovative in our application of our efforts. That seems to be in the best interest of those served.

Concern and discussion about the propriety of a nonprofit using its nonprofit status to compete against for-profit businesses adds another level to the discussion. The Girl Scouts organization, for all the good they do, takes hundreds of millions of dollars of retail cookie sales from for-profit retailers. These sales, totaling nearly $800MM (in '11-12), are just short of the total annual revenue of all NCAA sports combined! The goal is not to criticize the Girl Scouts organization, but rather to highlight the sacred place occupied by some pretty big hitters. This competition exists in everything from higher education to blood banks to recreation centers to testing laboratories to day-care facilities to health care providers to insurance providers. Does the privileged status carry with it some special responsibility? (Friedman, 2008) The purpose is not to suggest that nonprofit status should be eliminated, but rather that it should not insulate from competition or the obligation to focus on efficiency and effectiveness.

The tax-exempt status exists in part, because many believe that nonprofits need special protection to be able to compete. As small, weak and vulnerable organizations, they need protection to compete. Since they are needed to provide essential services, a special status exists to encourage and support endeavors that society considers important. While this clearly does not apply to all nonprofits, in some cases, a self-serving monster may have been created that has the potential to be focused on its own survival, even to the detriment of its stakeholders.

The other part of this first question looks at the impact of competition on total dollars raised. Frequently there are multiple choices in a receptacle for your eleemosynary largess. In many cases there are multiple choices for entities serving the same avowed purpose or cause. Nothing precludes multiple organizations from pursuing the same good work, but what does this mean for the beneficiaries of that good work? Should there be a mechanism that eliminates overlap and duplication? Is the marketplace not that mechanism?

Wouldn't the ultimate recipients of the largess be better served with the aggregate dollars raised devoted to a single solution instead of competing solutions? While the net revenue raised by two separate nonprofits might be less than the net revenue raised by a single combined organization, after taking into account efficiencies and a reduction in work force, the solution might not be that easy to get to or even the desirable result. It appears that the effect of competition for donations is that it lifts all boats.

A study originally published in 2012 leads to the conclusion that competitive motivations serve as a driver and raises more funds than a cooperative or collaborative approach among donors (Ned Augenblick and Jesse M. Cunha, July 2012). A field study was used to test lab

results (Bornstein and Ben-Yossef, 1994; Bornstein et al., 2002) that had shown this to be true. The field experiment tested the impact on donor contributions when presented with information about the 1) contributions of members of their own group, 2) contributions of members of a competitor group and 3) no information about the contributions of others. There seem to be clear indicators that suggest that competitive motivators drive both higher contribution rates and total contributions. At the very least, this study suggests that when there are multiple nonprofits competing for donations, even if for the same ultimate beneficiaries, this competition may lead to a larger total raised.

The downside of aggressive competition is that many will perceive that the competition as putting them personally under attack. Yet, isn't that what is both desired and required? Those served deserve creative, innovative and relentless pursuit of individual missions.

As leaders, how then can we model behaviors for dealing with the likely reactions to the competition that we must seek? If a lack of stiff competition deprives us of the stretch and challenge we need to be our best, it means that we likely will sub-optimize our own performance. Who really knows what they are capable of without having competed against a worthy opponent? Encouraging vigorous discussion and disagreement about ideas and processes polishes the finished product. This dynamic seems true whether it is in a work situation, committee or board meeting or simply in your own head. A discussion in which you alone are the two voices or views likely will not be enough. Force yourself to find someone who will help you stay objective in light of inconvenient facts. Force yourself to have a discussion with someone who will challenge you to re-examine your thinking. Do this both in your work and in your personal life. Bring those you would mentor into those discussions. They have much to learn and much to teach. Their insights will surprise and delight you. The innocent questions will educate both you and them.

Demonizing competitors serves no useful purpose, reflects poorly on the person doing the characterizing and likely diminishes rational capacity to glean the very insights from analyzing methods and approaches that might improve our own efforts. Ego requires us to believe that every action a competitor takes is because of us. Shamanic teacher, Don Miguel Ruiz provides uncommon insight when he, in his "Four Agreements" advises us against taking things personally. While hesitating to guarantee that your life will "become filled with grace, peace, and unconditional love," as a result of not taking things personally, it seems appropriate to suggest that it will at least give us the opportunity to focus outside of ourselves. A focus outside of ourselves will allow us to realize that actions that might seem to be aimed at us may not be quite so sinister. Regardless of the actions of another, we cannot know their motivations. Lest we desire the same interpretation of our actions, we are best served by avoiding judgment of motivations.

The exercise of keeping score in a game lets us know how the competitors are doing. Keeping track of performance in our work measures our success. Access to meaningful measures will make donors and consumers better at what they do. It seems appropriate to

suggest that there is both an obligation and an opportunity to provide donors and consumers quality information that will aid the consumer, the donor and the provider. Each of us, in our own sector, needs to support the free and accurate flow of information and the objective analysis of that information. Donors have a right, and an obligation, to know information about the effectiveness and cost structures associated with the nonprofits they support. While emotion will drive some to invest in horribly inefficient nonprofits, we need to encourage transparent, high-quality information.

As leaders, we need to model behaviors that rationally react to the aggressive competition we see in the marketplace and in our competitors. We have an obligation to promote appropriate behaviors and call out actions within our organizations that do not serve the mission or the constituents. Appropriate reaction is the rule of the day.

God, grant me the serenity to accept the things I cannot change-

Reinhold Niebuhr's serenity prayer offers a calming, rational and appropriate approach to many challenges, not the least of which is this work we do. Living with imperfection and uncertainty is the human state.

The courage to change the things I can-

To protect the efficiency and the effectiveness of this important work we do, we must seek to inform. By creating wise donors and consumers, we insure that our efforts are truly for the benefit of those we serve.

And wisdom to know the difference-

Seek out counsel and advice, even if, or especially if, it is not what we want to hear. Look in the mirror. This work we do to help those that need our support, requires no less of us, but at the same time, provides us with uncommon reward.

Kevin Matheny

Chief Development Officer, Concordia University

Kevin Matheny has worked in all phases of resource development since joining the field in 1986. He is a veteran of the secondary and higher education, as well as the health care, sectors.

Kevin is currently Chief Development Officer for the Concordia University Foundation in Portland, Oregon. He holds a Master of Arts degree in Philanthropy and Development from Saint Mary's University of Minnesota. He is designated as a Certified Fund Raising Executive (CFRE).

Formerly an Adjunct Assistant Professor of Public Administration at Portland State University, Kevin taught in PSU's Institute for Non-Profit Management for 15 years. Kevin currently teaches in the Master of Arts in International Development and Service program at Concordia University.

This is Kevin's third *GHC Conversation.*

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On the Road to Creating Safer, Healthier, More Educated Communities

Kevin Matheny

I have been reading a new book for the last couple of months. Its title is The Generosity Network, by Jennifer McCrea and Jeffrey Walker. I am so excited about this book that I gave it to my entire staff to read, sort of a Christmas gift. Now I have my fundraising class at Concordia University reading the book. I'd suggest to our President that our Council of Trustees read it but I don't think they are quite ready for that experience yet. (Although it just occurred to me that I should give it to the President to read.) Why am I so enamored of this book?

I have been coming to this place that McCrea and Walker describe for what seems like many years now. The authors have invited us to a place where generosity is an act that shapes our life. McCrea knows exactly when the game changed for her. She tells a story of working aimlessly while on a visit with benefactors in Manhattan on behalf of the university she served. Tired and discouraged, McCrea chose, instead of once again describing the college's latest exploits or newest programs, to shake things up and ask the alum sitting across the table from her how he wanted to make a difference with his life. The ensuing response and conversation that followed moved the focus from one of transaction to one of relationship. McCrea describes a place where two people sit down and hold a conversation about what they can do together that might be unique and compelling for all concerned, not just the institution. It moves fund–raising away from being transactional and about money and to a place where dreams are touched and felt and more often than not, organizations are changed. It is a place where philanthropists are bound together by their innate desire to share passion and wonder and to carry out their expressed intent to do good in the world. Going forward, McCrea has declared this the space from which she will collaborate with all donors. To that end she has been incredibly successful.

My introduction to McCrea and Walker has been most timely. Nearly four years ago I came to Concordia University to serve as its Chief Development Officer. At the time, my charge was fairly straight ahead: lead the staff, grow the annual fund to $1m a year within five years, and conduct a $7.5m campaign to build a new athletic stadium. The annual fund goes to $1m next year and the stadium opened two years ago. I like my staff a lot.

About three weeks after I joined the team at Concordia University, I attended a meeting in our library that not only included the President's cabinet but leadership from Portland Public Schools as well. Turned out that we had a pre K through 8 school directly across the street from us that we had been involved with for several years. PPS officials wanted to talk with us about their plans for the school's future.

The plans that PPS leadership described were truly unique. Faced with aging facilities across the district, PPS intended to float a bond measure out to the voters that would include Faubion School and that would allow them to completely rebuild the school. Faubion is a school that draws from the largest catchment area in the school district (On paper it looks like the state of California). Eighty-one percent of its students are part of the free and reduced lunch program and thus rely on the school to provide breakfast and lunch five days a week. Approximately 20 percent of the students are classified as homeless.

Based on the partnership we had built with the school and the district over the previous few years, one that included our providing student teachers, mentors, aides in the classroom, reading partners, and playground supervision, the district invited us to partner with them in building the new school. Among other things, they envisioned that Concordia University would co-locate its college of education in the new school. For a college that is land-locked in a residential neighborhood, the opportunity to expand the campus seemed like an incredible turn of good fortune.

In the fall of 2012, PPS successfully undertook the bond campaign. A new Faubion would open in September of 2017. Concordia, which began planning in the summer of 2012, conducted a capacity assessment among 37 local, regional, and national key informants concurrently with the bond campaign. Though the ideas shared by the university were unformed, there was enough merit in the presentation that respondents suggested that the university bring its plans back to them when the scope of the project had firmed. There was real interest.

Several important recommendations were gathered from the responses including:

- The project needed to reflect opportunity for replication in other schools and districts;
- The project must be more than new buildings for the school and the university;
- The project must impact the opportunity gap for underserved children;
- The notion of shared programs, leadership and a continuum of pre-K to graduate level education, carried out in a public/private partnership held strong appeal;
- There was sufficient interest that $6-7.5m could be raised for the project from among the respondents.

With the passage of the bond and with its capacity assessment in hand, Concordia University began the process of developing its strategy for what quickly became known as 3 to Ph.D.

As the project and all of its ambitions began to be shaped, it was clear that the project could have huge collective impact if structured strategically and innovatively. One of the first inclinations was to gather a network of support services in order to assure a level playing field for the children to be served. Services would include mental health care, grocery and nutrition services, arts organizations, family resources, and health and wellness, among others. While a breadth of wrap-around services was essential to the success of the project, Concordia University knew it did not have the band-width to manage this essential component alone. The university found it imperative to secure a qualified partner to lead this. Thus, we have reached out and secured Trillium Family Services, the largest mental health provider in the state as our partner in providing these services. Further, we have engaged the "I Have a Dream" Foundation as an advisory partner because of their success in building an innovative series of partnerships in establishing the Earl Boyles School.

I have maintained from the outset that this project can move the university closer to a realization of its mission than has ever been possible before. The university's mission is to prepare leaders for the transformation of society. Currently, the university places upwards of 300 students each semester in servant leader roles at Faubion. (The university also places many other undergraduate students at other sites throughout Portland.) Having the opportunity to actually work in the field is critical to realizing the mission. The hands-on experience can only occur through deployment in the field. Concordia University can and will bring a variety of resources to bear in this project – fundraising, management, innovative educational ideas and practices, other partners, among others – but it is the servant leadership effect that no else can offer. It is the university's "secret sauce" and incredibly is a resource of which the university has in abundance.

Why is this so important? Because it speaks to the breadth and the depth of the project. This is not something being built narrowly to only serve the School of Education at Concordia University and the children at Faubion School in their work together to demonstrate better classroom performance. On the contrary, 3 to Ph.D. demands that the entire community be engaged because it will take that much to build a safer, healthier, more educated community. So much more is required to position students for a successful classroom experience. Children will learn so much better if they aren't hungry, if they have a place to sleep, if they are receiving medical care and mental health service. We believe we have captured what is necessary to achieve our mission of a safer, healthier, more educated community. Now, in much the same way as Jennifer McCrea, we have set about finding others who want to make a difference with their life.

As our ideas have taken shape and been molded through our Theory of Change model, the project has become clearer. Now, instead of us seeking conversations, conversations are

starting to come to us. The substance that was required a year ago is arriving through the development of our model and through the partners we have invited to join us. People readily get it about what it is we are trying to accomplish. The diagrams and the text convey what we are seeking to impart.

As partners join us, we are building capacity within the philanthropy sector. This capacity is being built through collective impact that, as the catalyst question suggests, "rallies teams from many organizations." We have long-believed that if our project is substantial, the money will follow. We have $15.5m to raise for the capital side of 3 to Ph.D. Such an amount is as large as any the university has ever attempted to raise for a single project. What those dollars will build is only relevant if the buildings provide a home for the ability to create a safer, healthier, more educated community. We will be successful in raising the money to the extent that the project reflects the desire of potential philanthropists to make a difference with their lives. On that our future rests.

Sandra Wilson, CGA

Chief Financial Officer, Vice President Philanthropy, Hamilton Health Sciences Foundation

Sandy is CFO, VP Philanthropy of the Hamilton Health Sciences Foundation which includes Hamilton General Hospital Foundation, Juravinski Hospital and Cancer Centre Foundation, McMaster Children's Hospital Foundation, St. Peter's Hospital Foundation and all of their associated programs. Through the generosity of our donors, we fund capital redevelopment projects, purchase medical equipment and technology, and invest in research and education. Our missions is to raise funds and manage donor gifts to support outstanding clinical care and research for the communities served by Hamilton Health Sciences; our goal is Health Care, Transformed.

Sandy is a Certified General Accountant (CGA) with over 24 years of day to day financial accounting experience and more than 13 years of not-for-profit management experience. Strategic vision and growth have been a key area of responsibility in both the for-profit and nonprofit sectors. She has a strong emphasis on analyzing and identifying organizational efficiencies and inefficiencies with a focus on developing and implementing a plan to realign and strengthen the organization and realize cost reductions while maintaining and improving operational integrity.

Sandy is married to Michael and very proud mother to Connor and Shirley-Ray.

This is Sandy's first *GHC Conversation*.

gary**hubbell** consulting

Acting Above Self-Interest

Sandra Wilson

In order for us to achieve social and community betterment it will necessitate collaboration with others, and it will require us to act above our own organizations, and more importantly our own base self-interest. Wise Action will be to wholeheartedly accept the teachings of the past, learn from them, and move forward in the best interests of our community.

Pursuing Organizational "Realignment" as One Path toward Wise Action

The nonprofit sector faces many challenges not dissimilar to every other sector. Economic downturns, competition for market share, attracting talent at all levels, and acquiring and retaining senior leadership are just some of the competitive factors that nonprofits are facing. Donors and funders continue to scrutinize organizations expecting more impact for the cause and reduced operational costs.

These challenges have spurred a myriad of ways to deal with them. Whether strategies for marketing, creative funding models, talent acquisition or enhanced organizational sustainability setups, the discussion of consolidation comes up. However the discussion should not be so narrow as to whether to consolidate separate entities. The discussion should be – what are the reasons for consolidation; what is the end goal; is consolidation the only option; have we honestly examined the intent of the need. Are we truly prepared for the change and are we prepared to give-up control?

As a certified accountant with more than two decades in the accounting world and more than 13 of those years in the nonprofit sector, I can attest to the reaction of consolidation in both the for profit and nonprofit sectors. Accountants are generally black and white ruled folk with the best intentions for their organizations within a framework of accounting rules. In researching and framing my thoughts on the Wise Action for an organization or an aligned group of people with an intention to do good, I was pleasantly surprised by the vast amount of forward thinking groups and individuals in our sector.

Merge Minnesota defines "Realignment" as a broad term that describes multiple kinds of organizational collaborations used as a strategy to address economic pressures and also as a

natural process that occurs as the nonprofit sector grows and matures.[59] Consolidation is one of the eight defined options for organizations to consider in the realignment of an organization within the sector (Appendix 1). Deciding among the choices requires senior management experience with the organizations and acknowledging the multiple layers of affect of a realignment option will produce for the affected organizations. Without proper investigation and true consideration of the possible benefits and pitfalls will lead to an unsuccessful realignment of the organizations involved.

Factors to Consider in Realignment

The nonprofit sector is a unique arena. In the United States, with the change in policy, any 501(c)(3) organization is considered a nonprofit, which includes associations set up to collect and support political organizations. Reporting of data at this time is not advanced enough to discern what is political versus what is social benefit, which raises concerns to the metrics that are published regarding past consolidation metrics and the increase in current nonprofit organizations. The data doesn't support making a rational and informed decision. However, anyone within the industry with the right heart and an open mind is aware that the need outweighs what the sector can provide for the true purpose of the sector.

In preparing for a Board Retreat presentation, I was introduced to the article "When Good is Not Good Enough"[60] to provide perspective to our Board where our organization was in relation to our own 2030 vision and to open discussion on where we felt our organization was in relation to the four scenarios that we had defined three years ago. The article addressed "collective impact" as an approach for solving problems, defining bold goals that change the game and lead to different decisions that would set your organization on a new trajectory that could ultimately lead to greater and accelerated impact.

In reading the article, both featured organizations had amazing results. Since 1984, Share Our Strength raised and invested more than $376 million with no previous philanthropic experience. KaBOOM was very similar, with more than 15,000 playgrounds have been built, more than 1 million volunteers and service to more than 6 million children since 1995. However both organizations felt they had shortchanged themselves and those they were meant to serve.[61]

In reviewing various articles and organizations that have focused on transformational change, a major factor in all of these organizations is the strength of the leader and the conviction of the organization. Do we have the experienced leadership in our sector to move the needle on social change now and in the future? In 2006 Thomas J. Tierney and the

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[59] Merge Minnesota

[60] When Good is Not Good Enough, *Stanford Social Innovation Review,* Bill Shore, Darrell Hammond, & Amy Celep Fall 2013

[61] When Good is Not Good Enough, *Stanford Social Innovation Review,* Bill Shore, Darrell Hammond, & Amy Celep Fall 2013

Bridgespan Group carried out an extensive study of leadership needs for U.S. nonprofits and determined that the sector has little choice but to think and act in new ways to recruit and retain the best leaders.[62] Based on the forecast prepared in this study, which included a growth rate similar to 1995-2004 and a retirement rate constant from 1996 to 2016, the study projected that nonprofits would require 78,000 new senior managers in 2016 alone, up from the 56,000 in 2006.

Will the future quality of leaders be enough to move social change to the forefront? For profit organizations invest heavily in developing current talent into future leaders. Nonprofits have very little bandwidth to cultivate future leaders with on-going budget constraints and increased social need. Will recruitment from the for profit sector delay the progress of the sector in social change? Will realignment plans be the knee-jerk reaction to bringing profit-based senior managers into the sector? Will Wise Action and presence be in the forefront of the interview process in the future for nonprofit senior recruitment? Will we have the experienced senior leadership in the right positions in order to effectively analyze realignment options and provide the necessary guidance for the right path?

As I consider Wise Action for our sector, I worry that a leadership deficit of seasoned professionals will impact our sector in more than a financial manner. I believe that the advancements in social change and organizational development will be significantly impacted and or regressed to a much earlier development phase. How can a business manager effectively assess the impact of combining organizations with different social mandates and missions when they are relatively new to the sector and/or possess only business acumen? I strongly feel that there are many more layers of social and environmental implications in a nonprofit realignment than in a for profit business combination. Advance investigation of the loss of donors due to a consolidation of entities needs to be considered, as certain grant funders have material limits for consideration while other donors will consider the organization not needing their support if they are larger. Critical to the success of any realignment is communication of the desired outcomes to all funders and donors.

David La Piana reported that the urge to merge shows no signs of abating.

> "Underlying this trend is two core beliefs: The nonprofit sector has too many organizations, and most nonprofits are too small and are therefore inefficient. Mergers, the thinking goes, would reduce the intense competition for scarce funding. Consolidating organizations would also introduce economies of scale to the sector, increasing efficiency and improving effectiveness."[63]

The article provides some very insightful examples of successful and unsuccessful mergers and the considerations that should be explored prior to deciding what option an

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[62]*The Leadership Deficit*, Thomas J. Tierney
[63]*Merging Wisely*, David La Piana, Spring 2010

organization should take. Reduced operating costs cannot be the driving factor in nonprofit consolidations. Mission, vision, and values need to be forefront. Seasoned leaders need to be able to work with boards to promote or defend their operations and clearly identify all of the possible pitfalls and successes of a merger. All possible scenarios need to be brought forward for consideration and the risks weighed appropriately. At times, it may be in the organization's best interest to close the doors.

La Piana points out that

> "Casual observers often perceive costs savings after mergers. But a closer inspection usually reveals that a merger itself did not save the money. Instead, it created a structure within which management was able to make the tough decisions that ultimately led to better financial footing – decisions such as instituting layoffs, restructuring contracts, and launching new fundraising programs, any of which could also have been undertaken without a merger had the organization's leadership been willing or able to do so."

A Barrier to Effective Collaboration: Living Systems Continually Recreate Themselves

During my tenure at Hamilton Health Sciences Foundation, there have been two foundations consolidated into the main Foundation. Both of these consolidations were significantly different and had very different and similar challenges. Each foundation's needs, current donors, programs and Board of Directors had to be intimately researched in order to achieve the objectives set out for the merger of the entities. Strong leadership, defined policies and processes, and a focused leadership team are integral to a successful consolidation. Consolidation of the operational aspects of the foundations is the easy part. Defining an aligned mission and vision and living and daily leading the values of the organization is the challenge that has to be overcome for a consolidation to be successful.

When I reflect on consolidations, I am brought back to thinking about the relationship between and among parts and wholes as discussed in Presence, Human Purpose and the Field of the Future.[64]

As the old adage goes, the whole is greater than the sum of the parts. We cannot continue to focus only on the "part" that we have the ability or the desire to change, we must focus on the greater good and the impact that our "part" is able to make in our society and to work collectively with others.

> "We cannot solve problems with the same kind of thinking that created them."
> —Albert Einstein

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[64]*PRESENCE, Human Purpose and the Field of the Future*, Peter Senge, C. Otto Scharmer, Joseph Jaworski, Betty Sue Flowers

We as leaders must think beyond self-interest, ego and easiest path to the betterment of society as a whole. Buckminster Fuller pointed out,

> "A living system continually recreates itself. But how this occurs in social systems such as global institutions depends on both our individual and collective level of awareness. An organization's members become vehicles for presencing the prevailing systems of management because those systems are most familiar. As long as our thinking is governed by habit – notably by industrial, 'machine age' concepts such as control, predictability, standardization, and 'faster is better' – we will continue to re-create institutions as they have been, despite their disharmony with the larger world, and the need of all living systems to evolve."[65]

I am reminded of political science - balance of power terminology; you must look beyond packaging to see what true policy is.

An article brought to our Management Team recently and explored at a previous GHC Conversation entitled "Ten Things to Do In A Conceptual Emergency"[66] reaffirmed the need for evolving and for "living more deeply and consciously in the present" – Re-Perceive the Present.

> "We underestimate the importance of living more deeply and consciously in the present. To make sense of the confusion around us we need to draw on our full capacities, extending our habits of what counts as "knowledge". In an age of boundless complexity plausibility is as powerful as truth. What drives the system is belief.
>
> Our reliance on numbers and objectivity has downplayed other ways of knowing that are more subjective; knowledge gained from experience, from intuition that we cannot justify from emotional response, from esoteric levels of consciousness, from the science of qualities rather than the science of quantities. The aesthetic arts, poetry, music, are powerful forms for generating and communicating knowledge, including conceptual knowledge and insight. We once knew this instinctively – we have forgotten. Today we learn from the future that we can no longer neglect traditional sources of wisdom, and that we cannot know everything. Knowledge lives in the darkness and the mystery, as well as the light."

> Traditional giving helps one person at a time by providing charity for immediate short-term needs. Strategic giving focuses on change and builds for the future.

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[65]*PRESENCE, Human Purpose and the Field of the Future*, Peter Senge, C. Otto Scharmer, Joseph Jaworski, Betty Sue Flowers

[66]*Ten Things to Do In A Conceptual Emergency*, International Futures Forum

William Schambra of the Hudson Institute issued a sweeping challenge during a speech to the staff of the Hewlett Foundation: "After a century of strategic philanthropy, involving untold billions of dollars, we have in fact failed to solve even one social problem once and for all, by penetrating to its root cause." The speech and questions were captured in a riveting article by Chris Cardona – What's Strategy Got to Do With It?[67] In this article, Schambra states "there are many institutional incentives for each foundation to pursue its own insulated and prideful way, and very few submit to a larger collective." I believe that he is referring to Wise Action of our sector and of philanthropic donors. "Just because you have money to invest in philanthropic causes doesn't mean your ideas are good. Rigor and humility are necessary guides."

In reading the article Philanthropy and the Social Economy: BLUEPRINT 2014,[68] I was intrigued by the "social economy frame" to capture the full set of options for both donors (those with the financial resources) and doers (entrepreneurs and organization executives). I am in complete agreement and awe of the digital civil society as outlined in this report. It further supports the work that the Rockefeller Foundation supports with their partnership with InnoCentive that links together a network of 150,000 engineers, scientists, and entrepreneurs around the world.[69] This article speaks to innovation and how it will take all forms of innovation, public, private and governmental to solve social problems. The collaboration from around the world will be the breakthrough for social chance and impact.

> "If I have seen further it is only by standing on the shoulders of giants"
> —Sir Issac Newton

There is unlimited knowledge available to anyone that desires. Interpreting the knowledge for the betterment of self and others can be the challenge. Wise Action for our sector will be to accept the teachings of the past and move forward from them. Expand on the already known, test the boundaries that society has put around us. Change the lens that we look out of on our everyday lives and interactions and be willing to accept. Collaboration with others will require us to 'act above' just our own organizations for the betterment of a great audience and impact, but in the end will be the reward that we are aiming for.

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[67]What's Strategy Got to Do With It? Chris Cardona, August 2013
[68]Philanthropy and the Social Economy: BLUEPRINT 2014, The Annual Industry Forecast by Lucy Bernholz
[69]Q&A Judith Rodin, by Eric Nee, Summer 2009

APPENDIX 1

Merge Minnesota – What is Realignment?

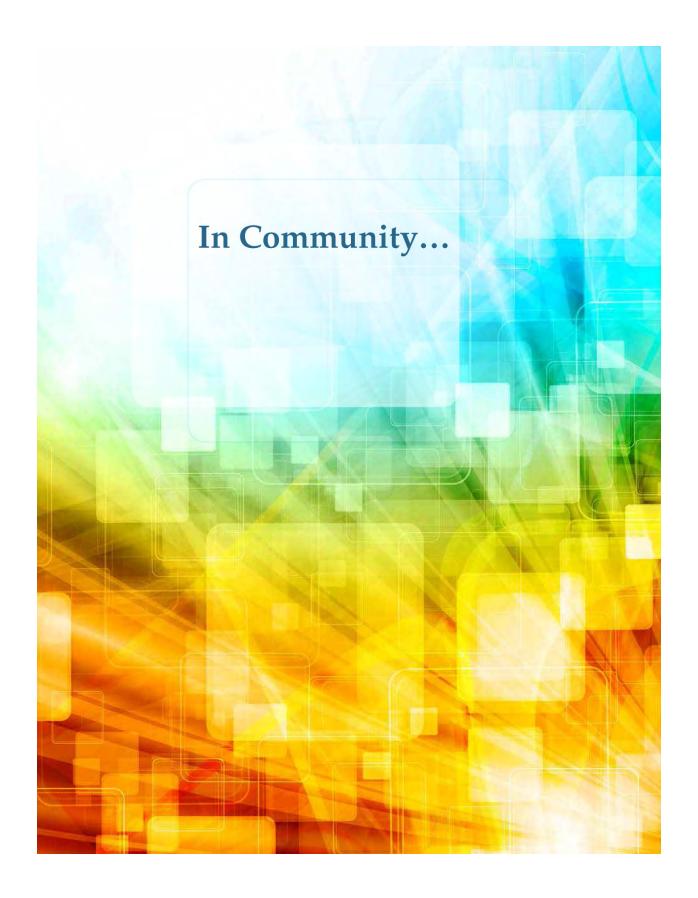|	
Administrative consolidation	Restructuring that includes the sharing, exchanging, or contracting of administrative functions to increase the administrative efficiency of one or more of the organizations involved. Such functions may include accounting, human resources, information and technology systems, marketing and purchasing, among other.
Consolidation	Combining separate organizations into a single one. Consolidation differs from a merger in that a new entity is created in the consolidation.
Joint programming	Restructuring that includes the joint launching and managing of one or more programs to further the programmatic mission of the participating organizations. For example, a domestic violence shelter and a rape crisis services organization got together to form and manage a domestic violence offenders' program, while continuing to operate their existing organizations and programs independently.
Joint venture corporation	An integration that includes the creation of a new organization to further a specific administrative or programmatic end of two or more organizations. Partner organizations share governance of the new organization.
Merger	The integration of all programmatic and administrative functions of multiple organizations, to increase the administrative efficiency and/or program quality of one or more of the partners. They can also integrate to increase geographic reach or achieve synergy between programs. Mergers occur when one or more organizations dissolve and become part of another organization's structure. The surviving organization may keep or change its name. A merger also occurs when two or more organizations dissolve and establish a new structure that includes some or all of the resources and programs of the original organizations.
Parent-subsidiary	An integration that combines some of the partners' administrative functions and programmatic services. The goal is to increase the administrative efficiency and program quality of one or more organizations through the creation of a new organization(s) or designation of an existing organization(s) ("parent") to oversee administrative functions and programmatic services of other organization(s) ("subsidiary"). Although the visibility and identify of the original organizations often remain intact in a parent-subsidiary relationship, some organizations involved in such restructurings consolidate to the point where they look and function much like a merged organization.
Program transfer	Occurs when one organization spins off or transfer administration of one or more of its programs to another organization.
Strategic restructuring	Occurs when two or more independent organizations establish an ongoing relationship to increase the administrative efficiency and/or further the programmatic mission of one or more of the participating organizations through shared, transferred, or combined services, resources, or programs. Strategic restructuring ranges from jointly-managed programs and consolidated administrative functions to full-scale mergers.

In Community…

Ken Hubbell

Principal, Ken Hubbell & Associates

Ken Hubbell is Founder and President of Ken Hubbell & Associates (www.kenhubbell.com), a consulting firm based in Little Rock, Arkansas. Established in 1992, the firm of Ken Hubbell and Associates (KHA) specializes in organizational development, change coaching, and strategic planning. Clients include charitable, regional and community foundations, nonprofit organizations, city governments, state and federal agencies, educational institutions, and select private companies.

Ken Hubbell has twenty years of experience developing resilient organizations and communities. KHA specializes in highly visual strategy tools and systems thinking. Ken has a wide range of experience with multi-stakeholder collaboration, social innovation, economic development, and equitable approaches to grassroots civic participation and poverty alleviation. He has worked in urban neighborhoods, rural regions, and in Namibia (in southern Africa).

His foundation clients include W. K. Kellogg, Northwest Area, Winthrop Rockefeller, Walton Family foundations, the Foundation for the Mid South. He provided unpaid strategic assistance to the Arkansas Community Foundation as it refined its community partnership strategies. Hubbell provides on-going consulting and coaching services to national nonprofits including MDC, Inc. in North Carolina, which provides wise strategic thinking to the field of philanthropy.

Ken has experience designing social solutions to complex problems (Native leaders and private foundations collaborating on social enterprise and governance in Indian Country across the upper Northwest; empowering vulnerable communities to redesign the future of their neighborhoods; and coaching collaboration among diverse stakeholders to accelerate Latino student success across the U. S.), adapting whole systems to organizational strategy (ecosystem and force-field mapping, scenario building to rehearse futures and test strategy for foundations and natural resource, health, arts, and food relief organizations), and facilitating new leadership development and learning for social sector organizations in Canada and the U.S.

Ken is the author of The Art of Change: A Handbook for Leading Effective Social Change (2012) a Field Guide to Community Coaching (2010) and "What's Love Got to Do with Philanthropy" and other insightful scenario essays on the future of nonprofit organizations for monographs edited by Gary J. Hubbell focused on discovering new meaning in the application of philanthropy in our times (http://www.garyhubbellconsulting.com/ghc-conversations/ghc-conversation-2012).

This is Ken's sixth *GHC Conversation.*

gary**hubbell** consulting

Dancing Lovingly with Communities

Ken Hubbell

Out beyond ideas of wrongdoing and right doing,
There is a field. I'll meet you there.
When the soul lies down in that grass,
The world is too full to talk about.
Ideas, language, even the phrase "each other" doesn't make any sense.
Mevlana jelaluddin rumi-13th century[1]

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[70] Retrieved 12-19-13 from worldprayers.org/archive/prayers/meditations/out_beyond_ideas_of_wrong.html

Figuring out right action or right doing requires us to follow our heart.

The Community Context: Steadily Evolving Living Systems

The context for social and community change is a natural place, often one that also supports people and economies. These complex living systems are highly interconnected. To affect something in a living system it is best to get to know it deeply, to identify leverage points and seek to learn from the changing patterns of the system over time. We can't force or expect a system to behave on our terms or in our timeframe no matter what kind of pressure is being applied by our organization, our leaders, or our funders. Undertaking skillful and effective change in communities requires leaders to be constant learners because we rarely can be sure that we know enough about the system's components, relationships, and time horizons to predict success or outcomes from our interventions. We have to be respectful, humble, and open to the consequences of our actions. In the words of an experienced system thinker, we have to dance with communities.[71]

Toward what lasting difference should we work?

Success would look like resilient, caring communities where people are healthy and feel at home. To ensure that more communities are viewed that way by their own residents, we clearly must close gaps and accelerate improvements by

- Reducing inequality and vulnerability
- Increasing the range of opportunities and plugging people into the best ones available
- Improving access to health and
- Opening up creative and untapped potential for every person.

What is the current situation for most communities in the U. S.?

It is impossible to capture simply the breadth of possibilities and challenges that are unfolding in communities. However, several disconcerting trends suggest that the uneven economic recovery has increased long-standing social imbalances. We have a reinforcing set of hard problems that have been distressingly resistant to our best attempts to solve them:

- We have almost 48 million Americans getting food benefits—they are often hungry.
- Almost 50 million people (including those dependent on food assistance) are considered poor, which covers almost 17% of our citizens—they are economically very unstable. This was clearly summarized recently in the New York Times: "Despite a half-century worth of technological progress and some fairly robust economic growth for much of that time, the labor market does a worse job lifting

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[71]Donella Meadows, "Dancing with Systems," *The Systems Thinker*, Vol.13, No. 2, March 2002, page 2.

people out of poverty today than it did before Neil Armstrong set foot on the moon."[72]

- Overall child-well-being has stagnated since 2002…the economic recession of the past few years effectively wiped out all of the gains we made cutting child poverty in the late 1990s.[73]

- The level of Americans who have been unemployed for six months or longer is almost 36% of the total unemployment. New studies discovered that in "a weak job market long-term unemployment tends to be self-perpetuating…the very fact of their unemployment made it very hard to find a new job."[74]

- Access to health insurance and care is now in the process of being extended to a large slice of these folks but estimates are that 20 million remain without insurance even after the Affordable Care Act is fully operational and several states health care payments and prescription costs are expensive for many working families.

- The Centers for Disease Control and Prevention reported in 2011 "progress on certain objectives **but less than adequate progress toward eliminating health disparities for the majority of objectives among segments of the U. S. population** (especially racial/ethnic)."

- Other government safety net programs are under funding pressures, many have been reduced.

These feedback signals indicate the country is facing multiple limits in our current systemic responses to providing access to health and well-being. Clearly, what we have is a set of cascading system failures; our typical responses look like "fire-fighting."

What could be the wisest and most skillful response to catalyze action leading to caring and lasting impact in communities?

In a macro sense, the wider situation suggests a more integrated and systemic response is in order. Considering the continued weight of the vulnerability, we need a blend of the rational and the ethical. What works and what creates the most good for those who are struggling? For individual leaders the question is: what is the highest of my own understanding? For groups, institutions, organizations, firms and agencies, the guiding question is: what is the highest and best use of our resources, ideas, and energies that produces the most good –especially for those most vulnerable?

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[72]Eduardo Porter, "In the War on Poverty, a Dogged Adversary," *New York Times*, December 13, 2013.
[73]2001 Kids Count Data Book, Annie E. Casey Foundation, Summary and Findings, page 32-34; downloaded from www.aecf.org
[74]Paul Krugman, "Writing Off the Unemployed," *New York Times*, February 9, 2014

Parker Palmer calls this "wu-wei, rightly understood—action that is harmonious with his own reality and the reality around him." He suggests a simple four-part framework to help us determine and execute "right action"[75]:

- **Motives:** Every action has some motive behind it, some impetus, a force field out of which it arises. If we do not explore that force we will never act in a transcendent way.

- **Skills and Gifts:** An authentic spirituality of action will celebrate our desire and capacity to co-create the world with the gifts we have been given. Palmer emphasizes the inherent tensions: "in order to gain the strength that comes from knowing our gifts, we may have to fight the ego's drive to dominate our lives."

- **The Other:** Every action, Palmer notes, is a dynamic meeting between an individual and an other. This means giving up one the most cherished but destructive myths of our technological society—the myth that all things are plastic, malleable, capable of being molded into any shape we require or desire."[76]

- **Results:** Palmer suggests that "right action is a process of birthing that cannot be forced, only followed."

Like Palmer, who shines a bright light on the pivot of motives as a driver of Wise Action, many ethicists emphasize a similar focus on the power of intention as a key determinant. "The individual's overall state of heart and mind, or motivation, in the moment of action, is generally speaking, the key to determining its ethical content."[77]

Buddhist practitioners frame the path to skillful, lasting action by linking it harmoniously to intention and discernment that produces insight.

"Action, like View and Meditation, does not stand alone. Action without clarity of view is blundering and apt to cause more harm than good. And action without meditation tends to be speedy and complex, rather than spacious and simple. But if these three factors are in balance, clarity of view and meditative awareness permeate all our activities."[78]

What would an ethical, holistic approach look like in practice? Are there some ethical principles to help?

Discerning real right action that improves communities requires leaders to move past "can we do this?" to "should we do this?" It seems that we got sidetracked by utility and a desire to at least get something done. There is a difference between efficiency—what some scholars refer to as rational action-- and that which is also morally right. There seems to clearly be a morally and socially "right" set of actions that a person can intuit as criteria for

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[75]Parker Palmer, "The Woodcarver," in *The Active Life*, Harper SanFrancisco, 1991, pages 58-75
[76]Palmer, op cit., page 69-70
[77]Dalai Lama, *Ethics for the New Millenium*, Riverhead Books, New York, 1999, page 31.
[78]Judy Lief, "Back to Basics: Is Meditation Enough?" *Tricycle* collection; retrieved on 6-3-2013 from http://www.tricycle.com/special-section/back-basics-meditation-enough

Wise Action in Community. In their Defense of Utilitarianism, C. L. and Quinqai Sheng explained

> "One the extension from utility for the agent to social utility has been established, we are entitled to say that the bridging of the is/ought gap in moral actions is also by definition. That is, we deliberately call these actions that maximize social utility right actions."[79]

Thus, we can see the underpinnings of wise and right action in ethical philosophy, Christian and Buddhist ethics, and even in commonsense principles for community development.

To figure out what action is both good and right, contemporary philosopher Philippa Foot echoes the right moral actions platform of Sheng and Sheng when she argued there was no criterion for practical rationality that is not derived from that of goodness of the will.

> "For surely human beings, who are capable of judging which states of affairs are better and which worse, could never be right to choose to produce a worse state of affairs when they could produce a better? Mustn't they always choose the better over the worse? To this one should reply roundly that it is no doubt a truism that they should act as well as they can. And there is also no doubt often a place for an enquiry, somewhere within morality, for a question about which action will have the best consequences on the whole, given, for example, that the end is to relieve suffering or to see that justice is done."[80]

Christian ethics

Most Wise Action reflects basic Christian ethics, and illuminates the ethical principles of servant leadership, especially that which aims at social justice for those in need. "What is good; and what doth the Lord require of thee but to do justly, and to love mercy, and to walk humbly with God. (Micah 6:8, King James Bible).

In this biblical passage, "good" is framed in very intentional, yet simple terms: care about what is just, be compassionate and merciful toward others, and live with humility as a servant of God. Pursuing a clear path toward what is the very best you can envision that is good for people and this earth. Such an ethical path reinforces the vision of putting the spirit into action.

> "Jesus teaches us to pursue the life of heaven now and also then, anticipating the day when earth and heaven are one. Honest business, redemptive art, honorable law, sustainable living, medicine, education, making a home, tending a garden— they're all sacred tasks to be done in partnership with

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[79]*A Defense of Utilitarianism*, C. L. Sheng, Quingai Sheng, Millburn, NJ, University Press of America, 2004; Page 181.
[80]Philippa Foot, *Natural Goodness*, Clarendon Press, Oxford, 2001, location 808 in Kindle edition

God now, because they will all go on in the age to come. In heaven, on earth. Our eschatology shapes our ethics. Eschatology is about last things. Ethics are about how you live."[81]

Wise and just action is built on a scaffolding of conscience. Catholic theologian Thomas Aquinas described just action in Summa Theologicae. Aquinas described laws and action toward ends that broadly fulfill the common good, do not exceed the authority or reach of those who direct or impose the action, and do not place disproportionate burden on people in the community.[82]

A branch of Christian social gospel is still influential in mainline U. S. congregations. A Wikipedia entry noted In the United States, the Social Gospel is still influential in mainline Protestant denominations such as, African Methodist Episcopal Church, the Evangelical Lutheran Church in America, the Presbyterian Church USA, the United Church of Christ, the Christian Church (Disciples of Christ), and the United Methodist Church; it seems to be growing in the Episcopal Church as well.[83]

Buddhist ethics

There is an integrated approach in classic Buddhism that can help in creating purposeful and skillful action, especially that which expands happiness or relieves suffering for others." Buddhist ethics inform us that what is 'right' is behavior that is helpful rather than harmful, that is conducive to liberation and freedom."[84] In *Compassion in Action: Setting Out on the Path of Service*, Ram Dass suggested that "compassionate action is not done for others—it is done with others, for ourselves, because we can no longer avoid it. It helps fulfill our lives. It is acting from our deepest understanding of what life is, listening intently for the skillful means in each situation, and not compromising the truth. It is working with others in a selfless way, in a spirit of mutual respect."[85]

His Holiness The Dalai Lama emphasizes a small set of ethical principles that, when diligently practiced, can aid in the transformation of one's actions so they can optimize good outcomes: virtue, restraint, and compassion. But he counsels that the real challenge is not to view an ethic of Wise Action as merely the acquisition of knowledge, but instead as applied personal transformation so these principles can live through everyday action. "Those who are religiously minded must understand that there is no blessing or initiation—which, if only we could receive it—or any mysterious or magical formula, mantra, or

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[81]Rob Bell, *Love Wins: A Book about Heaven, Hell, and the Fate of Every Person Who Ever Lived*, HarperCollins eBooks.
[82]Retrieved 2-8-14 from http://www.patheos.com/blogs/kathyschiffer/2014/02/martin-luther-king-jr-quotes-st-augustine-and-st-thomas-aquinas/
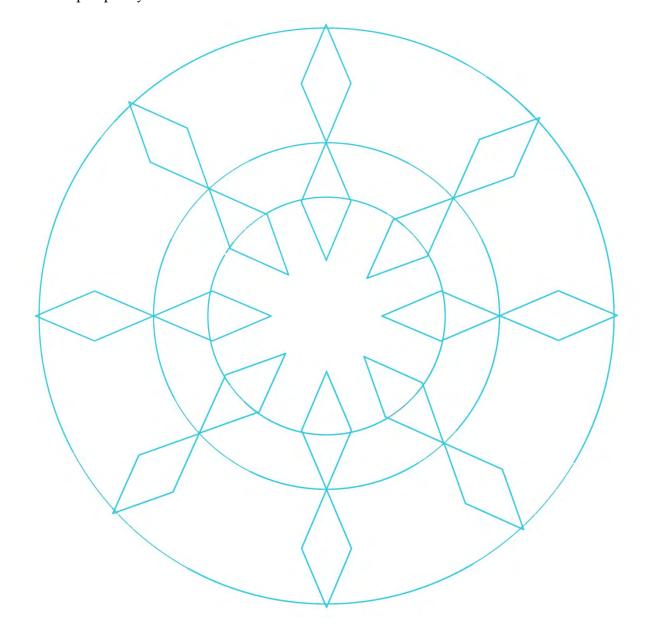[83]Retrieved 2-8-14 from http://en.wikipedia.org/wiki/Social_Gospel
[84]Lama Surya Das, *Awakening the Buddha Within, Tibetan Wisdom for the Western World*, Broadway Books, New York, 1997, page 200.
[85]Ram Dass, *Compassion in Action: Setting Out on the Path of Service*, Bell Tower (an imprint of Harmony Books), New York, 1992, Preface.

ritual—if only we could discover it—that can enable us to achieve transformation instantly. It comes little by little, just as a building is constructed brick by brick."[86]

Part of putting right action into practice means ensuring that your actions support ideas and directions framed by the local population and do no harm In Community. The Principles of Good Practice of the Community Development Society have withstood the test of time and still provide a guide for sincere and concerted community change that is community driven, respectful of local culture, sustainable, and enhances the local leadership capacity.[87]

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[86]Dalai Lama, *Ethics for the New Millennium,* page 119
[87]Retrieved 2-8-14 from http://www.comm-dev.org/

We can sense an emerging design of a holistic mandala built from the core principles of right action that have stood the test of time across many traditions and practices. We fill in the blanks on the following pages. In many different traditions, mandalas act as visual aids for reflection on an ideal vision, grounded in sacred intent, to restore harmony or well-being.

How do we sincerely work in concerted, compassionate, respectful ways In Community?

We can create a working synthesis from the moral and ethical platform that was highlighted in the previous sections. It is Illuminated by love, goodness and goodwill and focused with resolve on fairness and justice. Our opportunity is to make this real wherever we are.
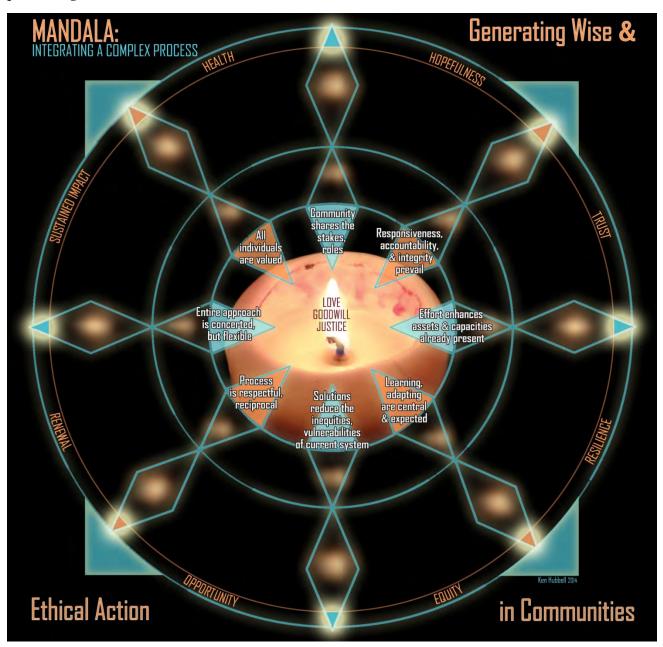
The eight essential principles add detail to our integrated mandala:

- All individuals are valued—voice, history, unique gifts and competencies, potential
- Community must share a major stake in the effort and play vital roles
- Responsiveness, accountability and integrity must prevail
- The effort should enhance the assets (human, social, cultural, natural) and capacities already present
- Solutions should address systemic issues, reduce important inequities and vulnerabilities not merely fix a sorry symptom, no matter how troubling
- Change processes should be grounded in respect and reciprocity
- The approach and action should be framed and coordinated in a concerted manner that amplifies impact and increases learning
- Continuous learning and adaptation are expected, failures will happen, rethinking and innovation will be key advantages

The outcomes produced by organizations paying serious attention to these principles would be resilience and increasing

- Hopefulness
- Health and well-being
- Trust
- Renewal (for people and environment)
- Opportunity
- Equity

Without living the principles, we can't fully generate the outcomes we are seeking. An illustration follows that fuses the light of love with the integrated principles to illuminate a path to right action.

Change-making as a Koan for Leaders

We have much work to do. We will have to stay awake in the face of daunting uncertainty. It feels like we have reached a leadership koan for our time-- an intentional expression of opposites we are challenged to dissolve, that we can use to shape discernment and spiritual practice. How we "be" with it is as important as what we "do." We can think of "one of the central functions of the koan as being to illuminate and then deconstruct our habitual

tendency to dualistic thinking in all the ways we dichotomize our life."[88] We won't be able to turn or run away from the common dilemmas that arise when we confront questions related to right action In Community.

1. How can we dissolve the apparent contradictions In Community improvement? Our temptation is to focus on small models in the face of wicked problems. To adequately address systemic challenges (improving health, access to quality affordable health, food, and higher education, etc.) demands decades yet resources and interests are narrow and often support only short-term solutions that aren't fully effective or sustainable.

2. How can we confront our own blind spots? Confronting our own assumptions is critical for transcending barriers to effective change. Just because we care doesn't mean our "way" forward is the right or most skillful way. Even a clear theory isn't sufficient to catalyze lasting change. It usually requires collective action and learning from many partners.

3. How can we implement our solutions and not get so attached to them that we can't see other alternatives. How can we avoid becoming blind to our own contradictions? One path for leaders is to loosen our attachment to success and failure and hold the "brand" lightly: it is in service of a greater ideal. Many organizations carry out their missions, yet can't move the needle on the social change they wish to see. Many also create visions for their organization, but don't purposely describe the future conditions beyond the boundaries of the organization they hope will follow if their organizations grow to be world class or highly effective. Take time to answer and discuss the "so what" or "to what ends" questions. Be sure to see if your programs are making a visible down payment on the preferred future vision.

4. How can we find inspiration when the gap is often so large? Despite small success stories and important gains in important indicators, generally, the situation is stagnating for a large chunk of Americans. How shall we continue chipping away in the face of system feedback suggesting our approaches are insufficient to fundamentally alter the outcomes? The opening is for an inventive overhaul of many of our social strategies. It is important to replace discouragement with fresh thinking and a loving embrace of new concerted engagement and ideas. When your faith, practice, and feedback systems are working, right action will feel "right." This creates an opening for spaciousness, gratitude, and energy in the work.

Leading into and through dilemmas and continuous complexity will be the backbone for wise and right action. Taking as a start the essential principles from the Mandala, we can sense one way forward. As we extend our programs or services into community:

- Are all individuals valued? How well have we ensured that their voice, history, unique gifts and competencies, and potential have been incorporated?

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[88]Barry Magid, "Uselessness: The Koan of Just Sitting," *Tricycle*, Fall 2013; 34

- Does the community share a major stake in the effort and play vital roles?
- Are we truly responsive and accountable? Are we acting with integrity?
- How well does our current effort enhance the assets (human, social, cultural, natural) and capacities already present in the community?
- Do our solutions adequately address systemic issues, reduce important inequities and vulnerabilities not merely fix a sorry symptom, no matter how troubling?
- Have we grounded our engagement in respect and reciprocity—where each stakeholder is seen as having something to contribute as well as something to learn in the process?
- Have we framed and coordinated the approach and action in a concerted manner to amplify impact and increase learning across the community?
- Can we really adapt to unexpected changes and failures with innovation?

Dancing our Way to Wise Action

It is important to hold a view or generous mental model to locate Wise Action. Putting the Mandala into action requires taking one step at a time in exquisite relationship with community. As Ronald Heifetz reminds us we "need to sense the dancing space of others nearby to stay off their toes."[89] Donella Meadows captures the loving attitude toward community complexity and shines a light on the dance floor of community change for all of us. It helps answer the mystery of the Rumi poem at the beginning.

The Dance[90]

1. Get the beat
2. Listen to the wisdom of the system
3. Expose your mental models to the open air
4. Stay humble. Stay a learner
5. Honor and protect information
6. Locate responsibility in the system
7. Make feedback policies for feedback systems
8. Pay attention to what is important, not just what is quantifiable
9. Go for the good of the whole.
10. Expand time horizons
11. Expand thought horizons
12. Expand the boundary of caring
13. Celebrate complexity
14. Hold fast to the goal of goodness.

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[89] Ronald A. Heifetz, *Leadership Without Easy Answers*, Belknap/Harvard University Press, Cambridge, MA, 1994, p. 253.
[90] Donella Meadows, op. cit.

Stan Sawicki

Chief Development Officer, Trillium Family Services

Stan Sawicki is responsible for leadership and oversight of fundraising, communications and marketing programs for Trillium Family Services, the largest provider of mental and behavioral health services in Oregon. He and his Development team, both in the Portland Metropolitan and Mid-Willamette Valley regions, manage Trillium's special events, corporate relations, foundation grants, major gifts, volunteer programs, donor records, prospect research, media relations, advocacy, marketing materials, website content, annual reports, newsletters and special appeals. Mr. Sawicki is also directly responsible for major capital campaigns, planned giving and board development.
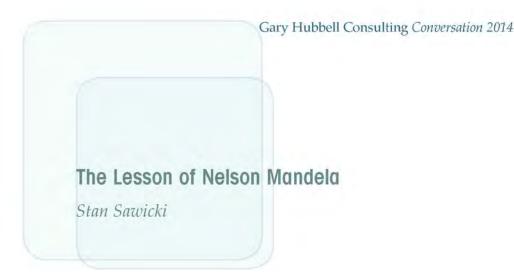
Stan studied, trained and worked as a journalist and public relations professional in Calgary, Canada prior to relocating in 1993 to Portland, where he joined the advertising agency, Chan Clarkson & Associates, as a copywriter and account manager. His work with a particular client – the inner Portland nonprofit agency, HOST Development – inspired his interest in fundraising, and he was hired by the United Way of the Columbia Willamette in 1995 to develop and expand charitable giving in the Portland area's burgeoning technology sector.

In 1999 he moved to the Christie School, an organization which at the time provided psychiatric residential services to children, first as a grant writer and then development director. In 2006 he guided its transition and re-branding to ChristieCare. He has been with Trillium since 2009.

Stan possesses a Bachelor of Science in Business Administration from Warner Pacific College. His volunteer activities include serving on the Board of Directors of the Duniway Educational Foundation.

This is Stan's first *GHC Conversation.*

garyhubbell **consulting**

The Lesson of Nelson Mandela

Stan Sawicki

Polarization (po.lar.i.za.tion):

a) division into two opposites b) concentration about opposing extremes of groups or interests formerly ranged on a continuum

Merriam-Webster

During the heart of Oregon's 2010 gubernatorial campaign, nearly 1,000 guests gathered at the Portland Hilton for the Oregon Community Foundation's annual luncheon. The keynote speaker was David Frohnmayer, the universally respected former president of the University of Oregon.
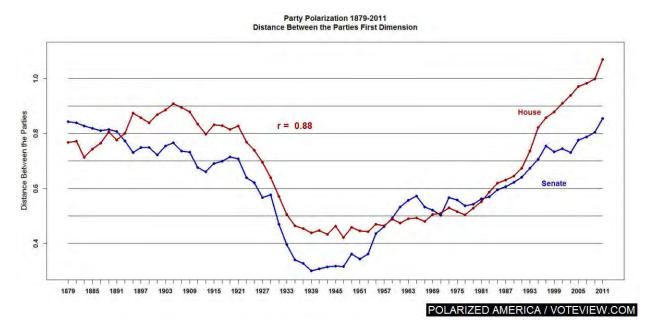
Frohnmayer's message that afternoon was mildly shocking to many in attendance. He spoke of a "disease" that had infiltrated our political system and was now spreading into our communities. He named the disease partisanship, and warned of its crippling and polarizing effects in the meaningful progress of our state and nation.

Really? In Oregon? To be sure, Oregon was, and is, sharply divided along political lines, with the wildly liberal metropolitan centers of Portland, Salem and Eugene on one end (does anyone watch *Portlandia*?), and the staunchly conservative rural communities of pretty much everywhere else in the state on the other. Even so, the two sides have for the most part peacefully co-existed and effectively co-governed for decades. Wasn't it just a few years ago when Oregon's senators – Democrat Ron Wyden, a Portland attorney, and Republican Gordon Smith, a millionaire businessman and devout Mormon from eastern Oregon – famously pledged to work together in Washington, with transparency and steadfast bipartisanship, to benefit all Oregonians – and then did?

On a national level, the euphoria that swept through much of the country with Barack Obama's 2008 election was waning somewhat, but the forces were not yet substantively aligned against him, the economy was slowly recovering, and there remained much to be optimistic and hopeful about. Surely Frohnmayer's warning was nothing to get worked up over, was it?

Turns out it was. Frohnmayer's portent has come to pass with Shakespearean dread, particularly at the national level. Quite simply, the nation's political engine has practically ground to halt as the result of ever widening partisanship and polarization. In his July 2012 Washington Post blog,[91] Ezra Klein listed 14 reasons why the 112th Congress was the worst in the nation's history, at least since Reconstruction (see below graph, based on roll call votes). Reason #3 was "They're incredibly polarized," and one could make the further case that #3 was a direct cause for many of the other 13, which included "They're not passing laws" (#1), "They're hideously unpopular" (#2), "They lost our credit rating" (#5), "They can't get appropriations done on time" (#9) and "There are actually problems they need to solve" (#14).

About that last one, there lie the casualties of polarization: the problems that need to be addressed now – poverty, student debt, gun violence, mental health stigma, income disparity, crumbling public education, hunger, to name just a few – go unaddressed, let alone unsolved. At least by the government sector.

Party Polarization 1879-2011
Distance Between the Parties First Dimension

POLARIZED AMERICA / VOTEVIEW.COM

"Nelson Mandela set me free."
Koos Botha, former leader of the Republic of South Africa's Conservative Party, in the film "The 16th Man" (2010)

After decades of unthinkably repressive rule, the South African government finally relented to intense international pressure and growing internal unrest, and released Nelson Mandela from prison on February 11, 1990, following 27 years of captivity. Many white South Africans – Afrikaners – feared the worst. They believed that Mandela's release signaled the

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[91]Klein, Ezra (2012). 14 reasons why this is the worst Congress ever. Washington Post. Retrieved February 1, 2014 from http://www.washingtonpost.com/blogs/wonkblog/wp/2012/07/13/13-reasons-why-this-is-the-worst-congress-ever/.

beginning of the end of apartheid, an ideology they felt was their birthright, and perhaps more to the point, one that ensured their safety and prosperity. The most fervent among them – known as the familiar-sounding "far right" – took up arms and vowed to fight rather than cede to the country's black majority.

Four years later, as South Africa's first ever democratic elections approached, along with the foregone conclusion that Mandela would become president, the far right lashed out with violence and bombings. Nothing, however, could stop the will of the newly liberated South African blacks who were voting for the first time in their lives, and Nelson Mandela was elected president on April 27, 1994.

As president, and with apartheid now abolished, Mandela could be easily forgiven for pursuing an agenda that marginalized the Afrikaners, as many in his African National Congress Party desired. After all, they had been his brutal oppressors throughout his entire life, including those 27 years in prison, and his people's brutal oppressors for many generations.

Instead, Mandela used his five-year presidency – his only term – primarily to achieve national reconciliation for all South Africans, and populated his cabinet with a racial coalition, representative of all South African people, ideologies and political parties, including white conservatives.

Perhaps the most unifying of Mandela's actions occurred at the 1995 Rugby World Cup, hosted by South Africa and immortalized in the films, Invictus and The 16th Man. South Africa's whites-only national team, the Springboks, had become global pariahs, forbidden to participate in previous World Cups and other international tournaments because of apartheid. Now, South Africa prepared to re-enter the world rugby stage.

Inside the country, blacks were skeptical. The Springboks had come to represent white oppression among blacks, so when Mandela appeared at a public rally wearing a team jersey, with the Springbok logo squarely over his heart, it shocked blacks and whites alike. It did, however, unify the country behind the Springboks, who obliged by winning the World Cup against much stronger competition.

It was Mandela's strength, humility and humanity in the face of intense polarization that brought his country's factions to a middle ground. His approach had a profound effect on Koos Botha, former leader of the Conservative Party and true believer in apartheid, prompting a man who had lived in privilege and freedom his whole life to declare that the former prisoner had set him free.

> **"There can be no liberation without reconciliation."**
> *From the film "The 16th Man" (2010), written by John Carlin*

This is the lesson of Nelson Mandela. For true progress, true change to occur, there must be acceptance by all, or at least almost all. Acceptance cannot be achieved by force or in

isolation. It is gained through inclusion, by respecting the voices of others and creating a forum for all to be heard. It requires the traits of Mandela noted above – strength, humility, humanity – but also kindness, compassion, tolerance, persistence, mercy and justice.

How can we in the nonprofit sector bring about progress and change in the face of the paralyzing partisanship and polarization that grips our nation? We lack the power and influence of the government sector. We lack the economic might and resources of the business sector. We lack a charismatic figure like Mandela.

We must lead by example. Many of us work for missions or causes than are nonpartisan in nature. As such, all people, regardless of their political or ideological stripes, have a stake in solving the problems that plague us today. We must engage all of them. For others in our sector who work for cause-related missions and practice advocacy that positions us squarely at one end of the ideological continuum or another, we must steel ourselves to respect opposing voices, no matter how wrong or misguided we believe them to be. Through acceptance and reconciliation we open minds to the possibility of working and achieving something together. A mind opened to possibility is then fertile to be influenced by fact, research and data. A closed mind is blind to these things.

This is not to say our sector has been immune to the "zero-sum mindset" referenced in the GHC Conversation 2014 Essay Preparation Guide, which often gets in the way of partnerships, collaborations and collective will. We've been encouraged by government, business and philanthropic interests to collaborate with like organizations to achieve efficiency and reduce redundancy, but we've been generally reluctant to share our trade secrets with our competitors.

While achieving efficiencies and reducing redundancies are noble pursuits, I see the emerging movement of cross-sector, or horizontal collaborative efforts as having much greater impact for our constituents and communities than partnerships with same-field organizations. At my organization, Trillium Family Services, we have with all good intentions sought out collaborations and partnerships with like organizations, but with modest success. The possibilities to effect change are endless, however, with the broad collaborations we now seek with partners in areas such as primary healthcare, education, social impact, economic empowerment and even government.

Through these relationships, true progress is measured by outcomes such as transforming systems that don't work, or changing lives rather than simply stabilizing them. Perhaps most importantly, it delivers the message to everyone, particularly our leaders, that polarized self-interest will get us nowhere.

> **"Having resentment against someone is like drinking poison**
> **and thinking it will kill your enemy."**
> *Nelson Mandela*

Richard Herman

President, Wheat Ridge Ministries

Richard Herman became the fourth president of Wheat Ridge Ministries on January 1, 2006. He joined Wheat Ridge in 1992 as Vice President and was appointed to Vice President/Chief Operating Officer in 2002. As vice president, Rick managed Wheat Ridge Ministries' grant program ministry and other programmatic issues and was also responsible for strategic planning, human resource issues and office management.

Rick served as a teacher, then principal of Lutheran High School of South Florida in Fort Lauderdale; principal of St. Paul Lutheran School in Boca Raton, Florida; and from 1986-92, he The Lutheran Church – Missouri Synod Florida-Georgia District as Executive Director for Parish Services with responsibility to assist Lutheran congregations and schools in the areas of education, youth ministry, and social ministry.

Rick holds a bachelor's degree from Concordia University, River Forest, and both a master's degree and an educational specialist's degree from Florida Atlantic University, Boca Raton, Florida. He continued his post-graduate studies at the University of Central Florida in Orlando. In 1991, Rick was honored by Concordia University with an honorary Doctor of Laws degree.

Rick is a former president of the national Lutheran Education Association (LEA) and served as chairperson for the Conference of LCMS Education Executives (CONFEDEX). He has written articles for several journals, including Lutheran Education, and for many years authored On Board, a quarterly resource for Lutheran school boards.

Rick is married to Deb Herman, Professor and Chair of the Art Department at Concordia University, Chicago. They have two daughters. Kristy is an Air Force veteran currently working for the U.S. Government in Germany and Katie, who lives in Chicago and serves as a compliance and regulatory specialist in the food industry.

This is Rick's first *GHC Conversation.*

garyhubbell consulting

Reflections on Wellness, Wisdom, and Community

Rick Herman

I am looking forward to participating in the Hubbell *Conversation* for the first time this year. I suspect I have not been alone in facing the challenge of finding time to write in the midst of many competing priorities at work and at home. But, Gary Hubbell always seems to have a method to his madness, so I trust that this aspect of our preparation will be worth the time invested and that it will be of collective benefit as we converse.

What follows are some reactions, opinions, observations and questions that came to mind in consideration of each of the three "sub-themes" of our conversation. I confess that this format was chosen because I was having trouble getting my head into the theme and lacked context as a first time conversation participant. I look forward to reading the work of other conversation partners confident that they will significantly expand and deepen my limited thoughts.

Right Being

Working closely with Gary during his year of engagement with Wheat Ridge Ministries on our new strategic plan, I came to appreciate his gift for using a word in a unique context or twisting a phrase in an interesting way. So, it was not surprising to see a phrase like "Right Being" as the leading thought for our theme.

The only results from a Google search of 'Right Being' changed the phrase to 'being right.' A simple flipping of words sure changes the meaning! It's probably too extreme to conclude that the results of this Google search illustrate that in today's society we place a high value on being right. It's interesting that changing the phrase to 'being right' conjures up other images and issues related to wisdom In Community. The pursuit of 'right' certainly can be an obstacle to progress and impact, especially since the path to being right often requires proving that others are wrong. Many of the world's challenges could be much more easily resolved if leaders started with the assumption that they aren't always right.

"Right Being" places a focus on 'being,' and uses the word 'right' to describe a state of being. Thus, it seems like it would be appropriate to say that 'Right Being' has to do with being well and having a healthy perspective on life.

At Wheat Ridge Ministries, the organization whose mission I've been privileged to pursue for the past twenty-one years, we would say a person who possesses "Right Being" is a person who experiences wellness of body, mind and spirit. A Biblical reference point for "Right Being" is Christ's statement that He came into the world so that we might experience "life to the full" (John 10:10). We often illustrate the concept of whole person wellness using the illustration of a "wholeness wheel" which describes various aspects of wellness and the importance of alignment and balance among them.

If this assumption about the definition of the phrase 'Right Being' is correct, it seems like a very appropriate lead phrase for our theme. Whether or not viewed from a theological perspective, well-being is an important prerequisite for effective leadership, including leadership that pursues Wise Action In Community with the goal of making the world a better place.

Wise Action

From the Old Testament book of 1 Kings:

> *At Gibeon the LORD appeared to Solomon during the night in a dream, and God said, "Ask for whatever you want me to give you." Solomon answered, "Now, LORD my God, you have made your servant king in place of my father David. But I am only a little child and do not know how to carry out my duties. Your servant is here among the people you have chosen, a great people, too numerous to count or number. So give your servant a discerning heart to govern your people and to distinguish between right and wrong. For who is able to govern this great people of yours?"*

People often refer to "the wisdom of Solomon" and lift him up as the exemplar of great wisdom. When God gave Solomon carte blanche to request whatever he wanted, the gift he requested was a discerning heart. Even in requesting this Solomon was demonstrating wisdom. Somehow he knew early in his leadership journey that more than power and authority was going to be needed in order for him to lead effectively.

Gary's thought provoking questions related to Wise Action trigger other questions, including questions about the relationship between being wise and being intelligent. Are wisdom and intelligence synonymous? If not, is wisdom always more important? If one has a "zero-sum" mentality about resources, does this reflect a lack of wisdom or intellect? Is implementing the organizational change needed for collaboration In Community primarily a technical or adaptive process? Which process requires more wisdom?

In Community

The desire for wisdom also begs an interesting question related to the third leg of our theme. Can organizations be wise? If so, how so and from where does this wisdom come? How do complex communities comprised of multiple organizations and systems arrive at wise decisions? Do the dynamics involved in more basic communities, such as families or work teams, hold true for larger community efforts?

Over the years, it has been very interesting to participate in and observe a variety of work teams. A number of years ago, Wheat Ridge Ministries developed a "Healthy Teams Workshop" to assist teams of church leaders as they strove to be effective. Among the resources shared during this workshop was a list of elements of healthy teams developed by Les Stroh of Cornerstone Consulting:

- Having a *charter* that articulates the team's reason for existence;
- Being able to *manage conflict* effectively;
- Intentionally determining how *decisions* will be made;
- Being able to provide honest and appropriate *feedback*;
- Establishing *norms* for acceptable expectations and behavior;
- Clearly defining the *roles* of each team member;
- Providing opportunities for *spiritual wellness* and renewal;
- Believing in the *synergy* that results from effective team-work.

One of the conclusions that most teams attending this workshop reached was that they significantly underestimated the energy, dedication and skill required to work together effectively as a team.

Recent experiences at Wheat Ridge Ministries in pursuit of impact reflect the joys and challenges of collaborating with other organizations. A few years ago, Wheat Ridge Ministries developed a relationship with Lutheran Immigration and Refugee Service that resulted in a jointly administered seed grant program to help local churches begin new outreach to immigrants. For a variety of reasons, we had a relatively easy time defining what we wanted to achieve together, establishing responsibilities and roles, and agreeing on how we would make decisions together. It was a great experience that resulted in a synergy that increased the impact of both organizations beyond what we could have done individually.

On the other hand, a recent experience that rose from a quest to expand collaborations did not work well. We had identified a need that we felt required additional capacity from a partner organization. A candidate partner that seemed to hold great potential was quickly identified. We moved rapidly into significant discussions with this organization and some very interesting possibilities emerged, including the feasibility of merger. Our staffs became deeply engaged and energized and our boards, it seemed, were encouraging these

discussions. However, the exhilaration of envisioning bold new possibilities quickly turned to frustration as concerns from board members increased. In retrospect, it is evident that I had misinterpreted signs that I took as encouragement to move forward. We had moved too quickly and in the process had underestimated the challenge of achieving clarity regarding our board's readiness to seriously consider significant changes that would alter its level of authority.

Working effectively with other organizations is much more complex and difficult to achieve than collaborating with other team members within a single organization. Instead of 'simply' aligning the focus of a small group of individuals, many individuals, teams, and systems are involved. And, mission and culture alignment can be a challenge.

An example of this complexity is a "Stages of the Collaboration Continuum" chart developed by James Austin, the author of The Collaborative Challenge. Austin describes three stages of collaboration that move in a continuum from low to high intensity engagement:

He then identifies several dimensions of collaboration that help determine the stage of collaboration that exists. These dimensions include: level of engagement, importance to mission, magnitude of resources, type of resources, scope of activities, interaction level, trust, managerial complexity, and strategic value.

A similar reminder of the complexity of working to achieve collective impact is a February, 2014 blog post in the Stanford Social Innovation Review by Chris Thompson, director of regional engagement at the Fund for our Economic Future, a collaboration of philanthropy in Northeast Ohio. In this post, Chris shares that his efforts to build collaborations have taught him several valuable lessons:

1. Pursuit of collective impact is long-term work;
2. Collaboration requires capacity;
3. Collective impact requires funders to shift their perspective

Because of these realities, Chris contends in the post that "collective impact remains more of an aspiration than an accomplishment for most of us."

Perhaps most important among these lessons is the issue of capacity. Many leaders, especially in the not for profit sector, are so busy doing what they are doing to keep the organization afloat that it is difficult to take the time to envision or pursue collaboration In

Community with others. When an organization is under-staffed, responsibility for pursing collaborative opportunities becomes yet another of many leadership plates to spin.

One solution to this dilemma, according to authors John Kania and Mark Kramer, managing partners at FSG, is a separate entity dedicated to coordinating and resourcing collaborations. In the article Collective Impact (*Stanford Social Innovation Review* - Winter, 2011) they state that "creating and managing collective impact requires a separate organization and staff with a very specific set of skills to serve as the backbone for the entire initiative. Coordination takes time, and none of the participating organizations has any to spare. The expectation that collaboration can occur without a supporting infrastructure is one of the most frequent reasons why it fails."

Once again, there are many questions to pursue regarding this element of our conversation theme. Are we, as stakeholders in our various communities, willing to change our behaviors and individual priorities in order to work together for collective impact? Are those of us who are funders willing to change our criteria and notions of successful grant making in order to support collective action? Who will establish the 'backbone' organizations needed to lead and coordinate collective efforts? Will we have the patience to participate in the long-term commitment required to achieve collective impact?

A Final Thought - Interdependence

Right Being… Wise Action… In Community. Each concept contributes to an organization's ability to impact the lives of people for good. Each can bring value independently, but just as is the case in effective work teams and in organization collaboration, the synergy when Right Being, wisdom, and collective commitment   are engaged as a whole package provides the greatest potential. Well-balanced leaders who make wise choices together for meaningful impact… a great vision for the 2014 Hubbell *Conversation*!

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End

Gary Hubbell Consulting works with organizations on the cusp of doing great things—retooling business income and philanthropy strategies; engaging board members and community in unprecedented ways; raising more money than ever before. Clients contact us seeking help to develop strategies that strengthen adaptive organizations for inevitable change and greater impact by fostering organizational agility, setting a plan in place around which commitment runs deep, and determining how to generate resources to fuel the resource engine of the future.