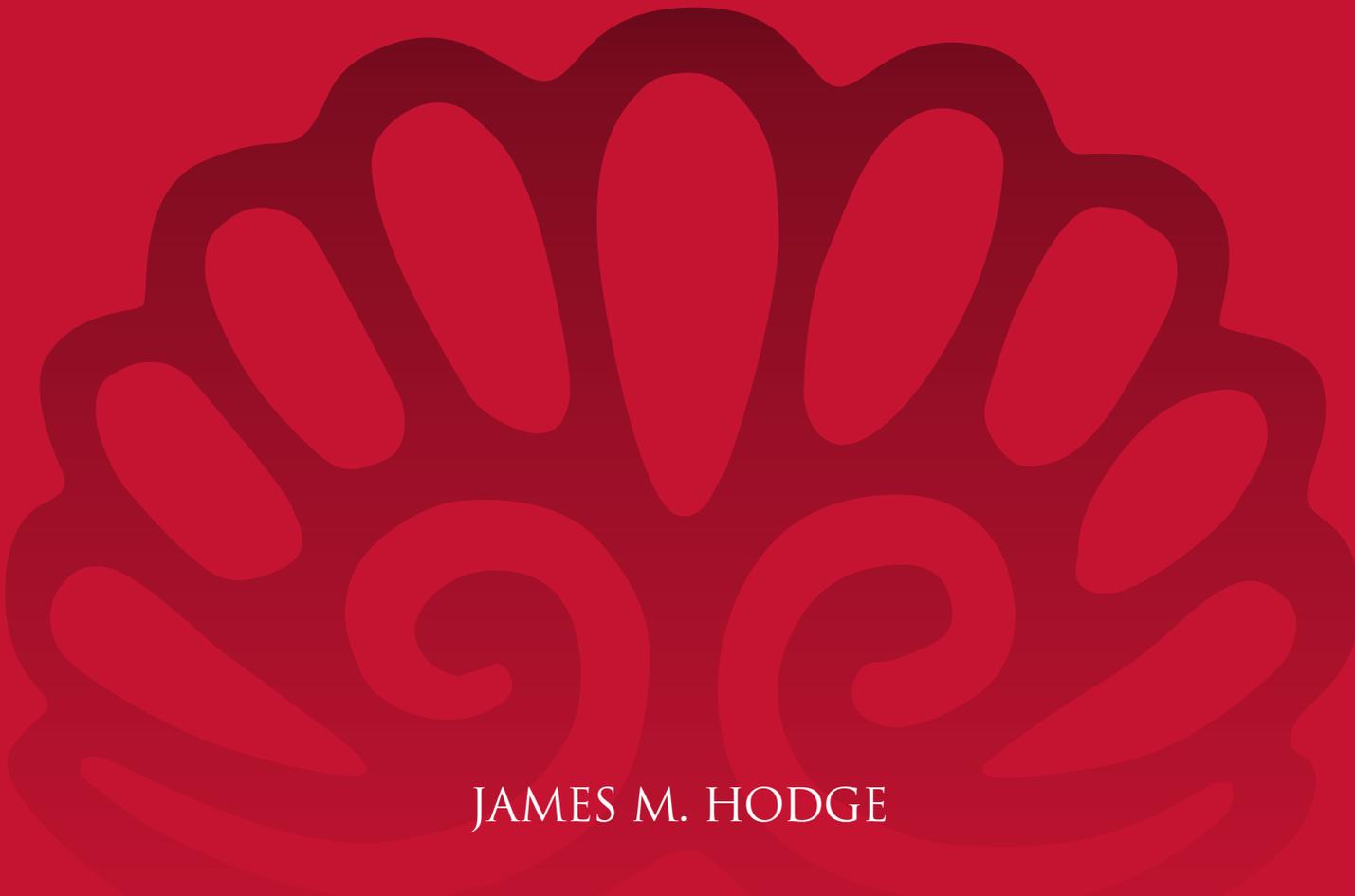


LAKE INSTITUTE ON FAITH AND GIVING

PHILANTHROPY & RELATIONSHIPS

IF PHILANTHROPY IS ALL ABOUT RELATIONSHIPS,
THEN WHY DO METRICS ONLY MEASURE MONEY?



JAMES M. HODGE

PHILANTHROPY & RELATIONSHIPS

*IF PHILANTHROPY IS ALL ABOUT RELATIONSHIPS,
THEN WHY DO METRICS ONLY MEASURE MONEY?
The Material to Spiritual Transformation of Philanthropy*

James M. Hodge
Mayo Clinic



The Center on Philanthropy at Indiana University
Indiana University-Purdue University Indianapolis

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FOREWORD

The Center on Philanthropy is dedicated to advancing the common good, understanding the powerful role that philanthropy can play in improving the world. On March 22, 2012, the Lake Institute on Faith & Giving, a keystone program of the Center on Philanthropy at Indiana University, hosted the ninth Thomas H. Lake Lecture. This annual lecture has historically served as a catalyst for positive change in our society, casting a positive impact on the broad field of philanthropy. Our extensive experience and expertise, our grounding in research and our commitment to marrying practical skills with a theoretical understanding of philanthropy is showcased through the annual Lake Lecture series.

Each year we are pleased to host an original presentation by a recognized scholar interested in the intersections of faith and giving. We intentionally elevate ideas that foster engaging discussion and yield practical insights for a diverse constituency of participants. Past speakers have covered a wide range of topics that include the role of charity in religious identity and have explored key topics examined through the distinct lens of research across three major faith traditions—Christianity, Judaism and Islam. Lecture respondents represent the various cross-sections of our community as they offer their responses to and understanding of the lecture topic selected each year. Together the Lake Lecturer, the respondents and the audience have made the Lake Lecture an anticipated community event.

This year, we had the pleasure of hosting James M. Hodge III, Associate Department Chairman and Director of Mayo Clinic's Principal Gifts Program, faculty member of The Fund Raising School at the Center on Philanthropy and past Vice President of Development at Bowling Green State University. He addressed the topic "If Philanthropy is all about relationships, then why do metrics only measure money?" with wisdom and deep reflection. A national voice on values-based philanthropy, Jim speaks frequently on the importance of transforming philanthropy, relationships and metrics. An accomplished speaker and author, Hodge also wrote the chapter entitled "Gifts of Significance" in the seminal guide for fundraising *Achieving Excellence in Fund Raising* edited by Jossey-Bass.

Co-founder of a multi-million-dollar for-profit business within Mayo Clinic that provides a 24/7 nursing and medical advice service worldwide, Jim Hodge challenges the world of philanthropy to shift from material to spiritual transformation in both approach and measurement. He cautions "when our focus is primarily on money in seeking philanthropy, we chase money rather than meaning in our profession." He notes that the focus on the product (money) lessens the importance of purpose in our work, and it not only raises less philanthropy, it devalues the noble

role that philanthropy can play in a well-examined life. Such reflection encourages an idealized, new and engaged philanthropy that results from nonprofit organizations and philanthropists working together to create a future where shared interests are both valued and pursued.

The Thomas H. Lake Lecture, a program of the Lake Institute, is the legacy gift of Tom and Marjorie Lake, their daughter Karen Lake Buttrey and Lilly Endowment Inc. We honor the philanthropic values of the Lake family through strategic priorities that continually examine how faith inspires and informs giving. Through years of intentional community building, we have nurtured an environment for public inquiry and crafted hands-on training that assists faith communities and donors in the pursuit of their philanthropic passions. The Lake Institute exists to explore the relationship between faith and giving in various religious traditions. We celebrate the Lake Lecture as an extension of this philanthropic passion.

Patrick Rooney
Executive Director
The Center on Philanthropy
at Indiana University
March 2012

Philanthropy & Relationships

If Philanthropy Is All About Relationships,
Then Why Do Metrics Only Measure Money?

The material to spiritual transformation of philanthropy

If it is a truism that “what we focus upon we become,” then perhaps we need both a vastly wider aperture as well as a more relevantly focused system of metrics for philanthropy. If we only focus on money, we will not only raise less money, but also we will devalue the noble role that philanthropy can play in well-examined lives.

When our work is primarily directed toward raising money, we chase money rather than meaning in philanthropy. We become less aspirational for our institutions and less inspirational to our benefactors.

There is another way. I contend there is a higher path for our work and that the creation of a relationship-based system of mentoring, coaching, and leading the philanthropic process will result in philanthropy well beyond our present levels, and indeed beyond our highest hopes. A focus on shared value systems, on the good that can come from combining visionary nonprofits and committed philanthropists, will propel philanthropy to new levels, resulting in a greatly expanded third sector in our economy.

Philanthropy is more about openings rather than about closings. It is about mutual aspirations of what is important and valuable to society. Gifts of significance are not so much about money as they are about meaning. We have much to learn from America’s most successful entrepreneurs in this regard. The truly successful, hypo-manic serial entrepreneurs all sing the same melody about their energetic and

euphoric foci on their work. It rarely involves the word money. From Edisons to Disneys to the unsung successful entrepreneurs in each of our communities, the same motivational mantra is spoken: It is not about money. It is, however, about inventing, about a contagious idea, about entering a market first, about building an elegant widget, about changing peoples' mindsets. Money is just a way of keeping score. Edison perhaps said it best when he exclaimed, "After I have completed an invention," remarked Edison, upon another occasion, "I seem to lose interest in it. One might think that the money value of an invention constitutes its reward to the man who loves his work. But, speaking for myself, I can honestly say this is not so. Life was never more full of joy to me, than when, a poor boy, I began to think out improvements in telegraphy, and to experiment with the cheapest and crudest appliances. But now that I have all the appliances I need, and am my own master, I continue to find my greatest pleasure, and so my reward, in the work that precedes what the world calls success."¹ Purportedly, when asked why he continued to invent since he was so rich, Edison remarked that people didn't understand his motivations. He didn't invent to make money; money allowed him to pursue his passion of inventing.

If we accept this as true, then our pursuit of money will never inspire gifts of significance.

Indeed, such a pursuit creates a sense within potential benefactors of being considered merely for their financial resources and not the plethora of talents and abilities benefactors can bring to an inspiring nonprofit organization. It is about the difference philanthropy can make in lives and communities and the world, and never about money. Most entrepreneurs I have come to know well and happily, as Bank of America and the Center on Philanthropy studies have shown, are significantly more philanthropic than others who are salaried or make their money in non-entrepreneurial ventures². They describe their passions more like Mihaly Csikszentmihalyi's famous psychological studies and writings on *Flow*. When these contagious souls are in "flow" in their work endeavors, entrepreneurs describe

¹ Marden, Orison Swett. *How They Succeeded: Life Stories of Successful Men and Women Told by Themselves*. Boston: Lothrop Publishing, 1901.

² The Center on Philanthropy at Indiana University. *The 2010 Study of High Net Worth Philanthropy*. Indianapolis: Bank of America Merrill Lynch, 2010.

their mental state as ferociously focused, single-mindedly immersed in a world of new ideas or better processes or novel markets. These are the souls swimming in Marborgne and Kim's *Blue Oceans* and dancing in Chris Anderson's *Long Tails* as described in these popular business books. Money never comes to mind except as the fuel that enables them to accomplish their visions. Thomas Edison once said, his goal was to make light bulbs so inexpensive that only the rich could afford to burn candles. So if these great visionaries in business, and now we recognize great exemplars in philanthropy, see money only as a fuel for joy and passion, then why should we fellow travelers in philanthropy not adopt a similar stance toward our work?

Money applied to philanthropic ends is a medium to serve others, to do purposeful work, to empower people to help themselves, to make an impact, and to improve the lots of others and the very health of our planet. Our philanthropic focus, therefore, must be on ideas and ideals and the power that they can have not only on the improved lives of those served but also on the quality of lives of philanthropists and those who work in the nonprofit world. For as Bob Payton once powerfully inquired, "Do we live for philanthropy, or do we live off of philanthropy?"³ Do we have an occupation in philanthropy or do you pursue a passion for philanthropy?" We indeed become that which we direct our attention to in life. Let us change the picture and start focusing far more attention on relationships with philanthropists and those with a philanthropic nature, rather than merely on money: on qualitative rather than quantitative metrics. Let us bring the relationship aspect of our profession to the foreground rather than assuming it is always the backdrop of our work.

But how do we take idealism into action through philanthropy? How do we explore the "moral dimensions of philanthropy,"⁴ as Paul Schervish contends is the true purpose aspect of our work? Seen as a spiritual exercise, philanthropists create their own moral biographies, according to Schervish. But are professionals in philanthropy trained to be "moral biographers," asking crucial questions and

³ Payton, Robert L. "Philanthropy as a Vocation." *Philanthropy: Voluntary Action for the Public Good*. New York: American Council on Education, 1988. Made available online by PaytonPapers.org.

⁴ Schervish, Paul G. "The Sense and Sensibility of Philanthropy as a Moral Citizenship of care." *Good Intentions: Moral Obstacles and Opportunities*, ed. David H. Smith. Bloomington: Indiana University Press, 2005.

entering into dialogues that significantly shift philanthropic conversations from money to meaning? Schervish has observed that “most wealth holders will benefit from engaging in what I call extended archaeological conversations with trusted advisors, including development officers.”⁵ Attending to benefactors’ needs to create moral biographies requires building genuine relationships based on trust. This is the genesis of relationship-based metrics.

Such metrics do not replace setting financial targets for our work, but they bring out the “better angels of our natures,”⁶ as Lincoln once said, and alter the focus of our work. The currency of our profession is in the enduring good we do together with benefactors, not in the amount of money we raise from benefactors.

By altering our stance toward benefactors, we avoid potential philanthropists thinking, “Do you love me, or do you love my money?” A more powerful reflection might be, “Think of the walk we can take together to make lives and communities better.” When we focus on ever-deepening relationships as outcomes, we open our apertures, we change lives and find better ways to “dilute the misery of the world,”⁷ as Karl Menninger suggested was the purpose of life.

When we only set financial goals, we miss the power that moral questions respectfully, purposefully directed, can mean in the lives of benefactors. We live only in a financial exchange relationship until we can redirect our work on toward the transformative effects that benefactors can have on individuals and communities. As Carl Jung said, “The least of things with a meaning is worth more in life than the greatest of things without it.”⁸ This is the money-to-meaning transformational power of philanthropy. To discover this meaning, our work must be benefactor-centric, values-based, and inquiry-driven. Our principal task then becomes identifying core values of individuals who may have a philanthropic nature, conversing about what brings purpose and joy to their lives, and examining their views of the social

⁵ Schervish, Paul G. “The Moral Biography of Wealth: Philosophical Reflections on the Foundation of Philanthropy.” *Nonprofit and Voluntary Sector Quarterly* 35.3 (2006): 488.

⁶ Lincoln, Abraham. “First Inaugural Address.” 4 March 1861.

⁷ “Biography: Karl Menninger, MD.” *International Child and Youth Care Network*. November 2007. Web. 18 July 2012. <cyc-net.org>.

⁸ Jung, Carl. *Modern Man in Search of a Soul*. Harcourt Harvest; Fifth or Later Edition edition, 1955.

responsibilities of wealth. These mindful conversations allow benefactors to consider the meaning of their lives, the difference they can and should make in their communities and the world, and ultimately the legacy they will leave behind. It is a long, purposeful walk we take with benefactors inquiring about meaning-building through philanthropy and a contemplative view of their lives' real purpose.

One of the most frequent, constantly asked questions I get from the inquiries of young professionals in philanthropy is, "How can I tell if a potential benefactor has a philanthropic nature?" This is a very important question that is rarely addressed at conferences or in institutional continuing education programs. When we practice benefactor-centric philanthropy, we discover an individual's core values, motivational makeup, and personal strivings. This is never accomplished by asking them for money, but rather by asking them questions of significance about their lives, their aspirations, and their hopes for the future.

How to discern a philanthropic nature will be an important skill set to teach professionals in our field. People who are evaluating their lives based upon their core values will not settle for less from professionals in philanthropy. Benefactors expect that we recognize, respect, and reinforce their deepest values played out through their gifts. As John Gardner observed, "If you have some respect for people as they are, you can be more effective in helping them become better than they are."⁹

Exploring core values requires the highest professional ethics and a stance toward benefactors that mirrors what Martin Buber, the great Jewish philosopher, called "I-thou," the authentic existence, rather than "I-it" relationships. "I-it" relationships objectify people, making them tools for our own benefit. We see them as a source of money rather than being in relationships with them and exploring the potential of doing good together in the world. An "I-thou" relationship with benefactors necessitates seeing individuals as ends in and of themselves (their values and their partnership) rather than seeing them as a means to an end (their money). Buber's work contends that "human lives find meaning in that "I-thou" relationship."¹⁰ Viktor Frankl perhaps expressed it in another way when he said,

⁹ Gardner, John W. *Proverbia*. Web. 2 September 2011. <*En.Proverbia.net*>.

¹⁰ Scott, Sarah. "Martin Buber (1878-1965)." *Internet Encyclopedia of Philosophy*. The New School of Social Research, 2010. Web. 18 July 2012. <*iep.utm.edu*>.

“It is not so much a matter of technique that is important but the spirit behind the technique that matters.”¹¹ The spirit of our work in philanthropy requires being in genuine relationships with fellow travelers who have the potential to improve the world. This is the material-to-spiritual shift in our work, and when practiced, the reward is working with more engaged philanthropists and far more joy and fulfillment throughout our careers.

Tom Morris repeatedly expressed this important shift in ethical stance toward people and the remarkable results that ensue when he said, “It is by imagination that we cross over the differences between ourselves and other beings and thus learn compassion, forbearance, mercy, forgiveness, sympathy, and love—the virtues without which neither we nor the world can survive.”¹²

When we have established an I-thou relationship with benefactors, our work becomes infused with powerful stories of our organization and benefactors at their best, stories that illustrate our institutional impact on those whom we serve and celebrate powerful exemplars in philanthropy. We inquire of benefactors: “What are your passions? What drives you to achieve? When do you feel you are at your authentic best for yourself and for others? What can you do with your resources that would bring meaning to your life?”

Over time we discover if an individual’s passions about their vocations or avocations can be grafted to your organizational mission. In truly transformative philanthropy, these passions grafted to your organization can evolve into full-blown passion transplants where benefactors adopt your organizational mission as the most meaningful work of their lives.

As Tom Morris further observed, “People are inspired over the long haul by a sense of nobility in who they are and what they are doing. If you can convey a sense of nobility to people around you, you can unlock their deepest potential.”¹³

Expressed similarly by William Irvine in his book *On Desire*, “Every man, however hopeless his pretensions may appear to all but himself, has some projects by

¹¹ Frankl, Viktor E. *Man’s Search For Meaning*. Boston: Beacon Press, 1959.

¹² Morris, Tom. *If Aristotle Ran General Motors*. New York: Henry Holt and Company, Inc., 1997. 167.

¹³ Morris, 214.

which he hopes to rise to reputation; some art by which he imagines that the nature of the world will be attractive.”¹⁴ About a famous Minnesotan, Charles Lindberg, F. Scott Fitzgerald said, “Something bright and alien flashed across the sky, a young Minnesotan who seemed to have nothing to do with his generation did a heroic thing and for a moment people set down their glasses in country clubs and speakeasies and thought of their old best dreams.”¹⁵

It is meaning we seek, and it is meaning we must address in philanthropic dialogues. Once the spirit behind their work is engrained in professionals, we must equip them with skills to tell important stories, to engage in illustrating our organizations’ missions in powerful metaphors. To finish the sentence which begins, “Isn’t it amazing . . .” with examples of the good our organizations have accomplished. To complete another sentence, “Can you imagine . . .” with examples of how together an effective nonprofit and an inspired benefactor can change a life, a community, and indeed, the world.

When in an “I-thou” relationship with benefactors, the use of appreciative inquiry becomes a natural extension of our philosophy. Instead of talking about the “needs of nonprofits” or the challenges and problems that face one’s organization, a shift in the nature of the questions we use is essential. Nonprofit institutions which speak consistently and insistently of their “needs” become, in fact, “needy” and uninspiring. Instead, specific training in appreciative inquiry developed by David Cooperrider and followers, talks of individuals’ and institutions’ highest hopes and aspirations. Lynn Twist, author of *The Soul of Money*, expressed it well when she observed, “If we can, we must shift our frame of reference from one of ‘problem solving’ to one that seeks to identify the resources available in any collection of people who are inspiring, mobilizing, and sustaining positive change. What you appreciate, the way you direct your attention determines the quality of your life.”¹⁶

Appreciative inquiry is all about co-creating an idealized future for ourselves and for our communities. *What Kind of World Do You Want?* is not only the title

¹⁴ Irvine, William B. *On Desire: Why We Want What We Want*. New York: Oxford University Press, 2006. 34.

¹⁵ Fitzgerald, F. Scott. “Echoes of the Jazz Age.” *The Crack-UP*. New York: New Directions Publishing Corporation, 1945. 20.

¹⁶ Twist, Lynne. *The Soul of Money*. New York: W.W. Norton & Company, 2003. 132.

of a wonderful book by Jim Lord and Pam McAllister but also the essential question behind all appreciative philanthropy. Can you envision our world at its best? Is achieving these aspirations not a noble and spiritual purpose for our lives?

Through observation and inquiry, we examine whether individuals have a propensity toward accumulating in their lives. If they have a high material value orientation, a habit of buying things rather than a more spiritual orientation of creating meaning, we can discern their philanthropic nature, or lack thereof. Newcomers to our profession should be taught, coached, and mentored in storytelling techniques and in questioning skills that can unlock philanthropic nature and maximize philanthropic potential. Self-assessment instruments can be created to determine whether development officers are enhancing relationship equity with potential benefactors as well as the relationship quotients between benefactors and institutions and their missions. Lickert Scale (LS) questions can be employed to determine donor attitude as we assess the evolving relationships between development officers and benefactors. With this system we can further assess how development officers are shaping important relationships between benefactors and their institutions.

Questions can be taught and observational skills developed to determine whether individuals are primarily ego-centric and self-absorbed, or other-centric and generative. Understanding and teaching Eric Erikson's stages of adult development can help in the assessment of individuals inclined toward hoarding from those who are philanthropic and inclined to sharing. Are potential philanthropic partners accumulators, amassing fortunes like Monopoly properties with a winner-take-all mentality? Or are they more like some other souls described in the book *Driven*, who have a strong propensity toward caring and sharing?

Master key questions that center on an individual's spirituality, intellectual curiosity, decision making, learning, and societal styles can be articulated and taught. How to earn trust, to respectfully ask ever-deepening questions concerning core values can be modeled and practiced. Appreciative inquiry workshops abound, and Franklin Covey classes on trust building can be explored.

It is true that highly skilled and experienced professionals in philanthropy

have developed and honed their relationship-building skills. They have an armamentarium of thoughtful questions to ask benefactors, and are skillful at knowing when sufficient trust is established with benefactors to ask significant and deeply personal questions. But veterans and newcomers alike should have a structured system of examining what they know and what they do not know about individuals with whom they work. Simple Lickert Scale questions can be developed that help monitor and chart the relationship metrics of our encounters, engagements, and experiences with benefactors. Such a series of weighted questions can determine how skilled a development officer is at creating and strengthening relationships with benefactors.

Two master key questions of importance are as follows: First, what is my relationship equity with this benefactor? How do I resonate with this benefactor and what is our level of mutual trust?

0	1	2	3	4	5
New/Weak				Mature/Strong	

Second, what is the institutional relationship quotient with this benefactor? Am I strengthening the ties between this potential benefactor and our organization, our leaders and our mission?

0	1	2	3	4	5
Little/Weak				Substantial/Strong	

By asking what we know and what we have yet to discern about a potential benefactor, we begin to see what respectful questions and crucial conversations we need to have to better understand what project might resonate with this person philanthropically. Is it an inspiring initiative that can bring meaning to the benefactor's life? Is it the right time, the right scale, and the right project for this individual? Is it a project that can grow and develop further, and one that will engage the benefactor over his or her lifetime?

All individuals go through ages and stages of adult development, so beautifully articulated by Erik and Joan Erikson. The Eriksons contend that later in one's adult life as they age, they can either ripen or spoil, either reach integrity, and generativity and be self-actualized or become more and more self-absorbed and stagnant. By observing benefactors' actions over a period of years and by probing values, one can be sensitive about emotional events occurring in a benefactor's life. What triggers and shifts are occurring in their lives that are emotional moments appropriate for favorable philanthropic dialogues or moments graciously to give benefactors space and time to deal with the trials and tribulations of life. Schervish again encourages us by saying that when "a process of discernment is carried out with no hidden agendas and with the purpose of helping wealth holders uncover their true aspirations, a deeper commitment to philanthropy ensues."¹⁷ Assessing a benefactor's significant emotional events and key indicators of shifts in thinking is essential when exploring gifts of significance. Do benefactors easily discuss death and dying, estate planning, and ultimate legacies? How do they define as a family when "enough is enough" and what they perceive as the social responsibility of their wealth?

These are not new concepts but a deliberate system of relationship-based evaluations which enable managers to determine if development officers are truly affecting the lives of benefactors and if they have the skills to engage others in questions of significance. Our work requires a purposeful shift to authentic, ever-deepening relationships and not solely requests for money and dollar-based metrics. What might make up a philanthropic nature, a potential to be generous? What roles do compassion, empathy, and gratitude play in the philanthropic personality? How might we deliberately assess these characteristics through stories, parables, metaphors, and questions?

Discussing recent disasters that afflict the world might reveal levels of empathy and compassion in potential benefactors. Determining if a person's empathy is based on feelings—"This is tragic and we feel compelled to help"—or whether

¹⁷ Schervish, 489.

empathy is more of a learned feeling, more grounded in learned behaviors as in “Our parents always taught us, ‘To whom much is given, much is required,’” and it is the obligation of wealth to be generative and to help others. Knowing the predominant form of empathic response may shape how we engage potential benefactors in experiences that are mission impactful.

Gilmore and Pine, in the book *Authenticity*, teach us that, “Today participating in meaningful experiences represents the largest unmet needs of Americans, more precious than economic capital: religion, country, art, and family and education, these are the resources that are literally priceless, from which we draw distinctions regarding our purposes in life.”¹⁸

An outline of the philosophy behind appreciative philanthropy and a potential outline for teaching relationship-based metrics are illustrated in Table I. A system of relationship-based metrics would also be important to the continued energy and passion of development officers. Rather than a practice or orientation of “scheming for money,” development officers would both dream of and aspire to a world of possibilities with benefactors. Through an appreciative-inquiry approach, both benefactors and development officers generate energy between them, resulting in better co-created futures for our organizations and the people whom we serve. Burnout would be reduced, job hopping would lessen, and the nobility of our work would be palpable and efficacious. In such a system we would become more like moral trainers, as Michael O’Neil once described our work in philanthropy, or “agents of change,” as Sheldon Garber viewed our profession at its best.

If we raise our sights and refocus our energies, we will find remarkable results that are impactful and patently obvious to philanthropists. They will fund new models of doing our work and efforts to assess the replicability and scalability of those models. They will, as the newly engaged philanthropists demonstrate, bring all of their resources to bear on solving significant societal issues. Those resources will include their business acumen, talents in raising capital, insights and experiences in the marketplace, financial resources, and more importantly, their commitment.

¹⁸ Gilmore, James H, and B. Joseph II Pine. *Authenticity: What consumers Really Want*. Boston: Harvard Business School Press, 2007. 76.

They will be compelled to join us in improving people and the planet. They will know when to apply capital and when a project should be halted if it is ineffectual or inefficient. We will stop all notions of pursuing benefactors for their purse strings rather than inspiring them for their heartstrings. A relationship-based model of metrics is not only possible, it is essential to the work we do in the long haul, and it will transform managers of solely dollar-based metrics into mentors and coaches for transformational philanthropy.

Again, Lynn Twist implores us to, “Renew our sense of a noble calling, not to settle into mediocrity, but to strive for our own personal form of greatness. If we could come to appreciate the meaning of life as a creative striving with love, we would be preparing ourselves to take on a new outlook toward the phenomenon of change.”¹⁹ A change in the spirit of our work in philanthropy and a change in what we teach, coach, and measure in our profession, the strategies, the techniques, the details, the methods, and the metrics, for a qualitative relationship-based model of philanthropy will ensue from such dialogues and will attract and retain the best in our philanthropic profession. We owe it to ourselves and our benefactors to further explore the why for giving instead of merely the how or what, to examine the core values of potential benefactors and how they intersect and overlap with our institutional missions. For in the end, philanthropy has little or nothing to do with money and everything to do with meaning and purpose in a well-examined life.

The great Spanish poet Antonio Machado said,

*Traveler, your footprints,
Are the path and nothing more;
Traveler, there is no path,
The path is made by walking.*²⁰

So I ask you today, shall we begin a new path?

¹⁹ Twist, 99.

²⁰ Machado, Antonio. “Traveler, There Is No Path.” Web. <minimo.50webs.org>.

TABLE I
APPRECIATIVE PHILANTHROPY
 A Qualitative Relationship-Based System of Metrics

PHILOSOPHY/ PSYCHOLOGY SPIRIT BEHIND OUR WORK	CHARACTERISTICS OF PHILANTHROPIC NATURE/INCLINATION		DEVELOPMENT OFFICER'S SKILL SETS		STRATEGIC ENGAGEMENT	OUTCOMES
Buber: I and Thou	Relationship stance	Empathic/ compassionate quotient	Signs of caring and sharing	Storytelling	Relationship equity Institutional quotient	Philanthropic joy and fulfillment
Schervish: Moral Biography	Moral dialogue	Questions of significance	Trust: permissions and protections	Demonstrated excellence and ethics	Co-creation of commitment and plan	Gift of signifi- cance
Erikson: Stages of Adult Development	Generativity Integrity	Ages and stages of development	Awareness, observing. Triggers and shifts	Matching philanthropic opportunities with benefactor	Respectful timing Pledge/planned gift	Act of generativity
Cooperrider/ Lord: Appreciative Inquiry	Aspirations	Highest hopes and striving	Positive future- directed focus on opportunities	All skill-building	Idea with meaning and impact?	An attitude of aspiration
James M. Hodge Mayo Clinic March 1, 2012						

James M. Hodge



Jim Hodge is presently overseeing the efforts of Mayo Clinic's principal gift program. He has been a member of the Department of Development for 15 years. Prior to his time at Mayo Clinic, Jim was the Director of Development, Associate Vice President of Bowling Green State University in Bowling Green, Ohio. His 21 years of fund-raising experience include specific emphasis on planned giving.

While at Bowling Green, Jim was a faculty member of the College Student Personnel Program and taught classes in fund raising. For more than 7 years he has been a guest lecturer at the Center on Philanthropy, served on the editorial board for *New Directions for Philanthropic Fundraising*, and has written articles focusing on planned giving and major gifts. The most recent focus of his numerous speaking engagements is on Values-Based Philanthropy and Transforming Philanthropy.

He presently serves on the Bowling Green State University Foundation Board of Directors and previously has served on the Bowling Green State University Alumni Association Board of Directors. He is a board member of numerous nonprofit organizations in the Rochester, Minnesota, area and has served as a gratis capital campaign consultant for several local capital campaigns.

The Center on Philanthropy's Lake Institute on Faith & Giving is dedicated to helping people of faith, regardless of their religious persuasion, think creatively and reflectively on the relationship between their faith and their giving. The Institute engages in research, provides resources that will educate and help people better understand giving as a reflection of their faith, and creates venues for civic conversation on this subject.

The Lake Institute on Faith & Giving honors the legacy of Thomas and Marjorie Lake. Thomas H. Lake served as president and chairman of Lilly Endowment Inc. for more than 20 years, accepting that leadership role after 30 years at Eli Lilly & Company, following his retirement as president of the company. The Lake Institute honors Mr. and Mrs. Lake and their many contributions through leadership in philanthropy.

