

**Navigating the Ocean of Philanthropy and the Inner Life:  
Spirit-Infused Philanthropy**

Retreat Report  
November 29- December 3, 2000  
Kona Village Resort  
Kailua-Kona, Hawaii

## Prayer

Today like every other day we wake up empty and frightened.  
Don't open the door to the study and begin reading,  
Take down the dulcimer.  
Let the beauty we love be the work that we do.  
There are hundreds of ways to kneel and kiss the ground.  
Rumi

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**Mary Ellen Shumway Gaylord**  
**May 30, 1931 – June 28, 2001**

This report is dedicated to reverend Mary Ellen Gaylord, mother of ten, minister in the United Church of Christ, active with the Graduate Theological Union, The Center for Women and Religion, the Interfaith Center at the Presidio, the Pacific School of Religion, Women's Donor Network, and the United Religions Initiative. Mary Ellen was an active philanthropist who truly led from her deep inner life, helping all of us to come from our own depths. A favorite quote from Kahlil Gibran expresses how she lives: "You give but little when you give of your possessions; it is when you give of yourself that you truly give."

Mary Ellen will be missed.

# INTRODUCTION

“We are creating a larger community of spirit and philanthropy. As Nainoa said, we are navigating the waters without any technology, and the only way to do that is to be inside yourself and be clear. I feel like we are in training; if the vision isn’t cohesive, it won’t work. We are like the prow of a boat going through this process, deepening in ourselves and with each other, in small and big conversations. The silence helps us with the inner navigation.”

- quote from a participant using a metaphor from Nainoa Thompson’s revival of ancient Polynesian, instrument-free navigation.

In November 2000, 54 individual donors, staff and trustees from public foundations, family foundations met in Kona on the big island of Hawaii, for the fourth Philanthropy and the Inner Life gathering. Although aspects of this topic have been explored in faith-based philanthropy for years, this group is exploring the spiritual dimensions in a secular context.

This group came together to explore the uncharted waters of spirit, inner life and philanthropy. There is no map to show the way. We strive to learn from navigators like Nainoa who learn to read the environment around them and to listen deeply within themselves in order to reach the imagined goal of an integrated philanthropy informed by our inner and outer realities.

## **Mission of Philanthropy and the Inner Life**

The Working Group on Philanthropy and the Inner Life that organized the Hawaii gathering is a diverse group of institutional grantmakers and individual donors committed to exploring ways to deepen and integrate what we value most in our inner life with what we value most in our philanthropic work.

By fostering dialogues on philanthropy and the inner life, providing opportunities for contemplation and reflection with colleagues, convening workshops and gatherings and publishing materials to support ongoing conversations on these issues, we have hoped to inspire the philanthropic community and catalyze more effective and just solutions for society’s most critical problems.

Philanthropy and the Inner Life began as a project of the Tides Center in San Francisco.

Because of changes in the Working Group, we have decided to pass the work and assets of the Working Group to the Center for Contemplative Mind in Society. This work includes:

- Encouraging the articulation of visions for philanthropy that include practices that illuminate the inner life and are mindful of the common good;

- Convening philanthropists and either introducing or reinforcing the powerful relationship between spiritual practice and philanthropy;
- Working in small groups with philanthropists who are able to make a deeper and more intensive commitment to these ideals.

### **Planning Team And Process**

The planning committee was composed of Kathy Barry (Phone Spirits), Mirabai Bush (The Center for Contemplative Mind in Society), Jennifer Ladd (Threshold Foundation), Idelisse Malave (Tides Foundation), and Charles Terry (recently of The Philanthropic Collaborative), and staffed by Sunanda Markus, Program Coordinator, with the help of Tomoe Maciejewski. The planning group wanted to create an intimate gathering for participants of previous conferences as well as for new participants from diverse sectors of philanthropy.

The planning committee chose Hawaii and the Kona Village Resort as a setting highly conducive to achieving the goals of the gathering. These were to:

- Discover and recover access to perspectives and practices that enable us to experience some degree of the true meaning of philanthropy through the interweaving of silence, being in nature, plenary, and small group conversations and story telling.
- Deepen the conversation, and stay connected.
- Create tracks which people can gather around.
- Ask questions or queries (from the Quaker tradition) that help people reflect.
- Learn about this field through people sharing their stories grounded in experience.
- Encourage more and better funding from a spiritual point of view (what ever that might mean for each funder).

### **Participants**

The 54 participants included individuals with both created and inherited wealth, staff from foundations or related institutions, members of family foundations, and other private and public foundations. We also invited teachers of contemplative practice, presenters and resource people. A number of participants were both grantmakers and grantseekers.

There were about 20% more women than men; most people were 40 years old and over. There were seven people of color. A multitude of faiths was represented including but not limited to Jewish, Buddhist, Quaker, Protestant, Catholic, Sufi, Hindu, Wiccan, Theosophist, and Anthroposophist. There were about an equal number of newcomers and previous participants.

### **The Setting**

The Kona Village Resort is comprised of small bungalows built in a variety of South Pacific architectural styles. The bungalows are open, light, and unlocked; there are neither televisions nor telephones in the rooms. Every hut stands next to palm trees and is either by the sea, a fishpond, a lagoon, or a great expanse of black lava that stretches for miles in all directions from the crescent beach upon which the resort is built. The dining room and meeting space are all open so there was never a time when the group was shut behind four walls without natural light or fresh air. Yoga and contemplative meditation were practiced

on a green lawn bounded by a wall of black lava. Every night the sky offered up a brightly shining inverted bowl of stars.

## **Resource People**

### Speakers

*Mirabai Bush*, Executive Director of Center for Contemplative Mind in Society.

*Bob Burnett*, Quaker, founder and vice president of Cisco systems, and publisher of “In These Times.”

*Helen LaKelly Hunt*, founder of the New York Women’s Fund and the Sister Fund and currently a doctoral student in religious studies.

*Meleana Aluli Myer*, Native Hawaiian artist, educator, community arts activist, and documentary filmmaker.

*John a Powell*, Founder and Executive Director of the Institute for Race and Poverty in Minneapolis.

*Charles Terry*, Board member of Center for Contemplative Mind in Society and recent President of The Philanthropy Collaborative/Rockefeller Family Office.

*C. Nainoa Thompson*, Program Director of the Polynesian Voyaging Society and Navigator and Sail Master of the Hokule’a.

### Leaders of Contemplative and Spiritual Practice

Kathy Barry and Bob Burnett – Quaker meeting

Mary Ellen Gaylord – Christian worship service

Sunanda Markus – Yoga

Steven Smith – Insight meditation

Diane Wexler, Bruce Beron, and others – Shabbat

Auntie Eleanor Makida – Chanting

Lani Opunui – Kona historian

### Cultural Workers

John and Hope Keawe, Songwriter and Slack-Key guitarist and dancer, respectively.

Halau o Kekuhi, One of Hawaii’s premier traditional-classical hula groups.

## **Meeting Agenda**

Every day started with optional yoga, meditation, or some form of worship. Discussion sessions began with extended periods of silence followed by speakers and whole group discussion. On Friday evening some participants led others through a Shabbat service. On Saturday morning there was a Quaker meeting and Christian worship. There were two small group meetings and a one shared-interest meeting.

The meeting began with introductions and background on former Philanthropy and the Inner Life Gatherings. On the second morning John Powell and Meleana Meyer addressed the question of spirit in activism, and in the afternoon Bob Burnett and Helen LaKelly Hunt addressed the theme of spirit-infused philanthropy. Mirabai Bush and Charles Terry discussed the larger context of the role of contemplative life in the Center for Contemplative Mind in Society’s work in law, journalism, academia, business, and the environment. The last day of the gathering began with an opportunity for people to express thoughts and

reflections that had been “cooking” throughout the gathering. Later that afternoon we considered actions we might take after the meeting.

Each day had a long break at lunch so people could relax, reflect, network and enjoy the outdoors. There were two site visits: one to a Hawaiian language immersion high school the day before the gathering and one to the future retreat site of the Hawaiian Insight Meditation Center, located on sacred land. Each night the group enjoyed and learned from some form of Hawaiian culture: slack key guitar, community building through navigation, and hula.

### Philanthropy and the Inner Life Detailed Agenda

#### **Wednesday Nov. 29**

Site Visit to the ‘Aha Punana Leo Immersion School in Hilo

#### **Thursday Nov 30**

- (7:00 – 7:30) Yoga led by Sunanda
- (7:30 – 8:00) Mindfulness Practice led by Steven Smith
- (8:00 – 9:00) Breakfast
- (9:00 - 10:30) Opening Ritual led by Kupuna Eleanor Makida and Leina'ala Keakealani
- (10:30 - 10:45) Break
- (10:45 - 12:30) Opening Circle: "What deepest question brought you here?"
- (12:30 - 3:30) Lunch and Break
- (3:30 - 3:45) Mindfulness Practice led by Steve Smith
- (3:45 - 4:15) Framing the Gathering, Introduction by Charles and Mirabai.
- (4:15 - 4:30) Break
- (4:30 - 6:00) Small Group Sharing: Diverse Understandings of Philanthropy and and the Inner Life.
- (6:30 - 8:00) Dinner
- (8:00 - 9:30) Music and Hula with John Keawe and his wife Hope

#### **Friday Dec. 1**

- (7:00 – 7:30) Yoga led by Sunanda
- (7:30 – 8:00) Mindfulness Practice led by Steven Smith
- (8:00 – 9:00) Breakfast
- (9:00 – 10:00) Mindfulness practice led by Steve Smith
- (10:00 – 11:30) Talking Story – “Spirit Infused Action for Social Change” Speakers: john powell and Manu Meyer
- (11:30 – 11:45) Break
- (11:45 - 12:30) Small Group Discussion: Spirit Infused Action for Social Change.
- (12:30 - 3:00) Lunch and Break
- (3:00 - 3:30) The Contemplative Contribution led by Mirabai
- (3:30 - 4:00) Mindfulness Practice led by Steven Smith
- (4:00 - 4:45) Large Group Discussion: Spirit Infused Philanthropy.  
Speakers: Bob Burnett and Helen LaKelly Hunt
- (5:40 - 6:00) Phone Spirits: An Experimental Funding Collaborative.
- (6:30 – 6:45) Shabbat service led by Bruce Beron & Diane Wexler

(6:45 – 8:00) Dinner  
(8:00 - 9:30) Nainoa Thompson - Polynesian Voyaging Society

### **Saturday Dec. 2**

(7:00 – 7:30) Christian Prayer Circle led by Mary Ellen Gaylord  
(7:30 – 8:00) Quaker Contemplative Practice led by Kathy Barry and Bob Burnett  
(8:00 – 9:00) Breakfast  
(9:00 –11:30) Imagining the Future: New Approaches to Spirited Funding led by Idelisse Malave  
(11:30 – 3:30) Visit to Kohala Coast – future site of Hawaii Insight Meditation Center  
(3:30 - 5:30) Grounding the Vision and Taking it Home led by Jenny Ladd  
(5:30 – 6:30) Closing Ritual  
(6:30 - 8:00) Dinner  
(8:00 – 9:30) Edith Kanaka 'ole Foundation presents traditional hula

## **The Philanthropic Context**

Working Group member Charles Terry opened the meeting by reminding us of the huge intergenerational transfer of wealth that is in process, and the general growth in philanthropy, particularly family foundations, over the past ten years. He questioned the spiritual meaning of this accumulation, asking, “Is there a magnitude of healing that can occur for the planet and the global society as this wealth is released, particularly when giving is based in deeply-held values of respect for all life?”

Mirabai Bush and Charles Terry talked about the previous conferences, which were held in Big Sura, Santa Fe, and Sedona. They reminded the group of questions that arose from those past gatherings and remain with us now. These questions speak to our conceptions of spirituality, of philanthropy, and our work in the world and how these all intersect.

### **On-Going Questions**

- What is our deepest intention in doing social activism/philanthropy?
- What does it mean to do “spiritually based” philanthropy—is it what we fund that is “spiritual”, or how we do it, or both?
- When is it more appropriate to fund where spirituality is embedded, rather than overt?
- How do we integrate our inner and outer lives, and what can that teach us about philanthropy?
- Are there issues at this time in our history that particularly call for this kind of philanthropic response?
- What are examples of social change initiatives that embody this?
- What does each of us mean by “spirituality”? How are we using this word in the group?
- How is philanthropy spiritual?
- How is the act of generosity an act of philanthropy?
- How does awakening spirituality lead us to our generosity and working for the common good?
- How do we bring together resonance in our personal and professional values?

- How do we bring spiritual values into our institutions, our actions, and relationships?
- How can we support others and ourselves, sustaining compassion while doing the work we need to do?
- How can we balance the importance of the outcomes of philanthropy with this inner work?
- How do we deal with issues of “measuring” in granting and doing work while developing sacred trust?
- How do we take the best of our spiritual traditions and build a spiritual space that helps bring people together instead of polarizing them?
- If religion is one of the things that separates us, how can we penetrate to the level of spirituality and find what unites us all?
- Can we and how can we develop a common language around these questions, and if so, how can we do it?

## **THEMES OF THE GATHERING**

### **Philanthropy and Contemplation**

Mirabai Bush addressed the value of contemplation. She talked about the immense commitment and serious work it takes to transform the problems in our world and raised the question of whether social change arises out of contemplation. She said, “We can not make anybody be spiritual; spiritual practice simply helps create the environment in which awakening is more likely to happen and people are more likely to make wholesome inner choices that will reduce suffering.

In the course of their work with activists The Center for Contemplative Mind in Society has learned that, “people need to be heard before they can be silent.” CCMS has begun to develop a meeting model that includes talking and silence.

Charles Terry talked about the significance of contemplative work in the world of philanthropy. “In Philanthropy and the Inner Life we are trying to provide inspiration and motivation, to create spaces where we can go deeper together. It really does lead to transformation in the world. go deeper and understand what it is all about. He said, “My experience is that often the best philanthropy emerges from a connection with one's inner life, from one's sense of soul -- and the more directly connected, the better.”

### **Inner Life and Social Justice: The Importance of Action**

john powell talked about the role of practice and action coming out of one's compassion. “The definition of compassion is to suffer when faced with serious suffering: ours and others’. This is the demand for social justice and for action. To help the ‘other’ is to claim our humanity and to become human beings. Human being have potential that is realized through practice.”

He went on to say that challenging oppressive institutional forms is a deeply personal spiritual act, “Our sense of self is mediated through our social relationships and systems and structures. In many ways, living from the inner life means challenging systems.” john went on to say that if we silence some part of ourselves inside, we are bound to silence ourselves

and perhaps others outside. Looking at social change this way shifts the focus from doing something for someone else disconnected from self, to coming from a deep sense of interconnectedness within and without.

## **The Split between Intentions and Actions**

Helen LaKelly Hunt, founder of the Sister Fund said, “Spirit infused philanthropy is about the capacity to be in connection.” She talked about ways that we are connected with ourselves and ways we are connected with others: grantees, other funders, board, and staff. “In the West there is a cultural split that goes back a long way; we say one thing and do another. American colonies left George III for individual freedom and a democratic system at the same time the institution of slavery was being birthed in the country. We are capable of living an enormous disassociation. We pretend it is not there, espousing another vision but often there is a shadow side. Spirit infused philanthropy is learning about your own shadow and your organization’s shadow.”

john powell pointed out that, “Spirituality and spiritual practice are not necessarily the same. We assume that if we meditate or go to church, somehow we are immersed in spirit; those are just practices that may or may not have any application.” john echoed sentiments that Michael Lerner wrote in the pre-conference packet. “Some of the most truly ‘spiritual’ people I know are people for whom the language of spirituality has no attraction whatsoever. And some of the most dedicated spiritual practitioners I know have a great deal of psychological work left to do. I have not found that the development of either wisdom or compassion is reliably proportionate to the esotericism or intensity of a seeker’s spiritual practice.”

## **Tensions in Philanthropy**

john powell addressed the tension that can exist between donors and grantees, among donors, and between grantees. He observed that though there is a profound urge to resolve the tensions in philanthropy prematurely, that would be a profound mistake. “Tension is another word for energy, which can be constructive or destructive. When something is intolerable there is an urge to move away into silence instead of embracing, being aware of that tension.”

One participant applied insight gained from his extensive experience with couples to the field of grantor/grantee relationships. He said, “I used to try to help people solve conflicts, but I have failed, because the conflict served a purpose that the couple needed. Something wanted to be born in the relationship.” If the donor/grantee power dynamic is glossed over, denied, or “fixed” an unimagined result may be lost. We as philanthropists and grantees need to learn how to be in the tension in order to be truly open to new emergent forms. As one person said, “Spirituality is facing that part that gives birth to your own discomfort and seeing that part of you that is changing.”

## **Authentic Donor-Grantee Relationships**

*How can donors and grantees be in authentic partnership?*

A donor suggested that if foundations and organizations share a common mission and passion they can be partners bringing different assets to the table. “The guilt, angst and challenges have to be listened to but they tend to be secondary when the passion is primary and the concern is how to get the whole darned thing to work.”

john pointed out that it is important to remember how much structures can distort dialogue. Inevitable structures must be addressed and changed if there is to be authentic dialogue between colleagues. He said, “To really have intimacy with a grantee you have to, at some point, not identify so primarily with your role as a funder.” He also acknowledged that foundations and funders need to have expectations of each other if they are intent on changing the world.

Meleana and john discussed the elements of trust and mutual respect, and the need for the donor to be as willing to be vulnerable, to be willing to be changed by the relationship as the grantee is. They said funders need to be willing to take risks on grantees who are passionately and thoughtfully involved in their projects. Grantees need donors who are willing to respectfully wrestle with them, engage them in discussion about the pros and cons of a particular direction. john said that real relationships are those in which grantees can make demands on the funder. Both john and Meleana pointed out that they do not need philanthropists to be parents; they need colleagues engaged in the same goals of achieving social justice. They both said that not all donor/grantee relationships can be deep and connected, and that it is important to discern when *not* to require deep personal connection.

*Who defines the nature and degree of intimacy in the relationship?*

It is usually the philanthropist who determines with whom they will have a deeper relationship and what that might look like. When grantees come seeking they often do not have as much power to equally establish the ground rules of engagement. When grantees seek to establish a closer relationship with a donor, their actions can be perceived as irritating or inappropriate. One person talked about how, “when a new person calls me on the phone, obviously searching for money, and they are asking about my family, that is tiring, wanting to be my friend, that is creepy.”

One donor pointed out that if intimacy was one of a donor’s criteria, groups could be rejected because of personality factors that might overshadow the worthiness of their project as a whole. “There are people I have given money to whom I don’t even like, but what they are doing is really important. The granting process is so much more complicated than waiting for this wonderful connection and moving on it.” She also asked, “Can I have a spiritual relationship with anyone where there is that power imbalance? I believe that class is critical to every relationship I have. If people can’t walk away, they can’t be honest. I know that I can tell myself incredible lies; privilege has a way of doing that. I need people to talk straight to me.”

Another donor said that it is very challenging to have a true partnership with grantees, since she often feels like she is seen as just a bank. How can she have authentic relationships with people or organizations in this situation?

*What is our philanthropic culture and how do we communicate it?*

We are different people and different kinds of foundations. Grant-seekers often have to determine the culture of one donor or foundation without the grantmaker being aware of this challenge. One person pointed out that, “It seems important to know ourselves as philanthropists; we need to tell people, for instance, that we are one-year funder or a multi-year funder so they know our intentions. The more clearly we can communicate, the better others can deal with us. Right now they have to guess what we mean by partnership, the better we know ourselves and articulate that, the more helpful it is to them and to the philanthropic relationship.

*How do rigid ideas of “giver” and “receiver” hold us back from true partnership?*

“We are all philanthropists” said Meleanna Meyer, articulating a strong and growing assumption in this gathering. “Philanthropy is not about some people having and others not having. Anyone can give money; it is a commodity, a tool.” Meleanna stressed the importance of realizing that it is all a gift; “Everything we have is gifted: the money, the talents, all that we bring to the dynamic is from a greater source. If it is seen in any way as being better to give than to be doing the work then there is a problem in the philanthropic relationship.” She considers herself a philanthropist when she cooks supper for a large group of folk stranded at the airport or when giving attention to a friend. She said philanthropy is about the active engagement in something of purpose.

This was echoed by a participant who said, “We as donors don’t have all the power. I have seen groups that have such a strong sense of their own vision and capacity that, in fact, funders are drawn to them. In what ways do I underestimate people by assuming weakness just because there is a financial power differential? They come with an embedded sense of the power of their ideas and their implementation.”

One participant talked about her experience with giving and receiving in Burma: “In that culture anything that is given is really received in a very different way than in our culture. When we gave pencils to every school child, every child came up, received the pencil, and made eye contact and hand contact. There was such a feeling of joy in the receiving; there was no feeling of it being power-full and power-less. Burmese culture honors generosity; they believe that both are receiving and both are giving, so all are valued. Trust comes out of that.”

## **Joys of philanthropy**

There were those participants who also expressed that, in the midst of the struggle, despite all the pain and power differentials, they feel a great deal of joy in philanthropy. One person said, “We need a holistic approach. As a group we are pretty aware of the struggle and pain and power differentiation in the world, and we are part of that. But I don’t hear a lot about the incredible joy of being a steward, of having the money, and what a gift that is. I feel it but I can hardly talk about it. How can I hold the joy and still feel the suffering out there?”

Another donor talked about the joy of grantees, “I have found in the philanthropy that I have been involved with that grantees become empowered. We tend to fund small things,

really on the edge, which no foundations would consider. During the last couple of years we have been holding grantee conferences where people come and be with each other, and they are incredibly empowered. The feeling of joy is huge, they become empowered and they can do the work they didn't think, didn't feel they could do before. That elevates them and therefore elevates everybody.”

### **Changing Posture of Philanthropy: Being the Peace**

As we move forward we agreed that we must work to embody the peace we are working toward. In our philanthropic structures we must create partnerships and practices that reflect the kind of democracy and respect that we espouse. One benefit of contemplative philanthropy is that we can act from a calmer, more centered and essentially joyful part of ourselves.

The new philanthropy may eventually reflect this. One participant spoke about the changing posture of philanthropy. He said, “We are naming what is coming into being. There is a Declaration of Philanthropy: we support healing work on this planet, we support the resistance to cultural oppression by being the peace we seek to build, not living the opposition. The new activism is much more grounded; we are going to celebrate the joy that we seek.”

# VOICES OF THE HEART

## Spirit Infused Philanthropy

In the session on Spirit-Infused Philanthropy, Bob Burnett posed to the group these four queries, in the Quaker tradition, followed by silence and reflection. He then commented upon them.

1. *What does spirit mean to you? What is the role of spirit in your life?*

Quakers believe spirit to mean being open to the light. Spirit is made manifest into communal mysticism when we gather in a group. It is a physical experience, not just an intellectual experience, in which one finds the courage to look at the darkness.

2. *What is the role of spirit in action for social change? What does it mean for me to say that the spirit moves me to take action?*

The idea of a leading is that one is physically impelled to take action, and one doesn't always want to do it. Acting for social change is an interaction between the belief and the action. We need the feedback loop of identifying the belief, taking action, then going into silence and looking to the light.

3. *What is philanthropy? How does philanthropy spring out of spirit and then social action? What is the relationship that you have found between them?*

For me, being a wealthy Quaker activist, giving of myself, my time, my talents, bringing my whole being into the pursuit of justice is being an instrument for justice. My wife, Kathy Barry, and I have a broader definition of philanthropy. We see political activity as part of the pursuit of justice, along with philanthropy; business start-ups can also be instruments for social justice

4. *What is the philanthropic process? What is the process we use in philanthropy in the pursuit of justice?*

The process is as important as the result. How we do things is actually part of what we want to achieve. We try to work by consensus, we try to work with groups in consensus, and expect relationships will be long term.

## SONG

Kavita Ramdas, President and CEO of the Global Fund for Women sang this beautiful song written by Guru Nanak, the founder of the Sikh religion, who sought to bridge the divisions between Islam and Hinduism. Translated it reads:

Like a bird without wings,

A man with out woman,  
A child without parents,  
So are we human beings without the sound and the name of the divine.

Like a well without water,  
A tree without fruit,  
The earth without clouds,  
Pundits without scriptures,  
So are we without the sound and the name of the divine.

Like a life without eyesight  
Like the sky without moon,  
Like a temple without candles,  
Lamps without oil  
So are we without the name of the divine.

Desire, anger, greed, and lack of generosity,  
Leave behind these petty feelings, my people,  
Look inside yourself,  
In this world of ours,  
There is none other than yourself, the divine within yourself.

## **Questions of Commitment in Philanthropy**

### **Philanthropy, Spirituality, Intimacy: Philandering Philanthropy**

A foundation staff person said, “The three words that come to me are: intimacy, power, and responsibility. In the foundation I work for, we do relationship-centered philanthropy. We get into a relationship first and bring a number of partners together at the conference center; we meet, talk and generate something together. Very often it is a very intimate experience; we are co-parenting a project. We are in relationship serving something larger, and if we are going to go about changing the paradigm we need to have a certain amount of power. So there is the responsibility, the intimacy, and the power.

”Where it gets tricky is when our board says, ‘Well we are going to get out of this.’ All of a sudden we are saying ‘we’re leaving.’ We become the parent saying. ‘Now it’s your job to support yourself on your own,’ or ‘it has gone awry and we are out of here.’ The person feels jilted. We want to go on and seed something else, and something else again, and before you know it we are philandering with our philanthropy. This can be very seductive, particularly as a male, to go in there with the idea and seed something, and boom, it is off, and it’s on to something else.”

### **To Whom, How Long, And Why?**

As the group discussed the nature of good partnership one person related her story of making a long-term commitment to a project. She said, “I have only been doing this work in Burma for five years. One of the questions that keeps coming up is about commitment. I relate to a 20-year commitment. In my own heart I couldn’t do anything less than that. I couldn’t imagine this kind of relationship starting and then bailing, and yet the longer I am

involved the harder it gets. It is just like a marriage. I am starting to penetrate the cultural differences and see what is really happening and it is rough. Many times I will think 'I am tired, this is way too hard.'

### **Being True to Self and Commitment**

Another person's response asked "If one is dedicated to following the inner impulses of the spirit how could one make a commitment of that long without being untrue to one's inner direction. "I understand your wanting to say we will be with you for 20 years, but that is like saying I know what I will be doing in 20 years. For me it is very important to be in the moment. It is a grand paradox. I don't want to blindly set myself on a path that is not the deepest and most authentic path. I don't want to lose sight of my relationship to self either. When you do, that is one of the biggest betrayals of all. When you end up living someone else's life, you may get to the end of it and you wonder whose life was it anyway happened. Am I willing to disappoint another to be true to your soul?"

## **Insights from Indigenous Culture**

Indigenous Hawaiian's voices wove throughout the conference creating an atmosphere of reverence for the earth, care for one another, and deep sense of the interconnectedness of all life. All of this within the context of struggle, or reclamation and working hard to create meaningful and strong community in the face of an atomizing, homogenizing, commercial dominant culture.

### **Power of Indigenous Education**

Meleanna Meyer began her talk with a chant of gratitude and appreciation for our gathering thus including us in the powerful role of ritual and invocation held in the Hawaiian culture. She spoke of the importance of indigenous education for everyone. She pointed out that all indigenous cultures have a conscious relationship to the earth, something we as a culture have totally lost. She pointed out the intergenerational benefits and the importance for all of us to understand where we have come from in order to know better where we are going. She also talked about the growing Hawaiian movement to reclaim and recover Hawaiian culture. After 200 years of not being used, it is now being resurrected and revived.

### **Site visits to 'Aha Punana Leo: A Hawaiian language immersion preschool and high school.**

Five people went for a daylong visit to the school in Hilo and had this to say, "What has stayed with me since visiting the school? That a small group of teachers did the impossible. Faced with the imminent extinction of their language and unable to speak it themselves, they decided take action to save it, regardless of the odds against them. Their success is an affirmation of the combined power of courage, determination, creativity and faith. It is what will save us all. I carry it around with me as a shield against hopelessness. With the new administration, I have been in need of a shield. I did not list love above because it can so easily sound trite. But it was love for their elders and their children that motivated them and love that they showed us on our visit. Despite the sad history of the US conquest and colonization, they still greeted us with open hearts, with joy. They didn't deny the history but they didn't flail us with it either."

“The students gave us an official welcome. They sang chants to the spirits for permission for us to enter the buildings. The whole school assembled – preschool with high school students, teachers and administrators - as one body. What power in the humility of being in collaboration with a larger universal whole? Our response to the welcome was offerings of singing and prayer, spoken from our own roots - in Spanish, Polish Italian, Hebrew and good ol' English. How do we each honor our origins in our daily practices? If we all go far back enough, we are connected to a people who were as connected to spirit in action as the people before us that day.

## **Experiments in Partnership Philanthropy**

*Christine Jurzykowski of Innovative Frontiers of the Marion Foundation*

”We are looking to push through the established borders between donors and grantees, to explore the nature of giving and receiving. We were led deep into underlying beliefs and often –invisible patterns of culture. Back to basics. Even language of philanthropy had to be questioned. Identity is separate from function. Nature of mutually reciprocal relationship-we each are givers and receivers. Money is just one of the currencies of exchange. Instead of ‘donor’ and ‘grantee’ we call ourselves project partners. If we identify ourselves as ‘philanthropist’ or ‘grantee,’ there is a world of assumptions and perceptions in the word itself that keeps us in the old patterns of behavior. We have engaged with four organizations as a start. It is not for everyone. It takes time to sit together, dialogue and look at the barriers that stop us from being connected, to name and embrace them, then out of the witnessing, create new ways of relating to one another. We commit to the long term as a way to eliminate the fear around truth-telling evaluations of one another and acknowledge the power dynamic behind those fears. It is a profound experience to sit in council and learn in this way, to par as much attention to the ‘how’ as to the ‘what.’ Now we feel ready to expand into new realms of learning and continue to share this learning with others.”

*Joanne Lighter of Allegany Franciscan Foundation*

“The heart’s desire of the sisters was to be a catalyst. We understand that all we have is money. The grantees have the people we want to serve and the services. We visit the applicants and all the grantees. We are interactive in the application process, and we read drafts. After deliberations we are sitting across from folks, telling them directly that their work is or is not our work to do. It’s real tough. We believe in spirit, connectedness, we give all the grants in person, bring grantees together, and encourage site visits between them. We tell them “We have chosen you because of what you do and the spirit within which you do it, and we will help you gain the skills to do it.” We keep the door open; if there is a problem we convene with the party and ask how they want to go forward. We are trying to be vulnerable, authentic, articulators. I call the grantees and ask their advice. They call us for possible partners. We break bread, we do ritual with grantees to honor and consecrate our relationship to them; they are very sacred to us.

*Mark Finzer of the Rudolph Steiner Foundation*

In the Midwest we have a Shared Gifting group. All the grantees have requests and come in individually with their own goals and self interest. The group is given a specific lump sum to distribute amongst themselves. They become grantees and grantors at the same time. All the participants come together in one room and listen to each other about what their needs are. All the projects share expertise, information, and networking as well. Amazing things happen in the meeting and sharing. One time one of the projects really needed help. This was a leverage project; if it could get what it needed everyone would benefit. One group representative said, 'I want to forgo any funds. You across the room need the funds more; my group won't like it but I will make a case for you.' It was very moving. RSF would like to launch this type of Shared Gifting around the country."

*Kavita Ram Das of the Global Fund for Women*

"In an effort to be more accessible to our grantees, we have sought to hold our Board meetings in other countries as well as in the USA. In an effort to share the "joys and responsibilities" of being donors, we developed the "partnership awards program" where the Global Fund makes grant awards (\$10,000 each in 1997 and \$5,00 each in 1992) to "grantees" so they in turn have the opportunity and pleasure of supporting grassroots efforts for change in their own societies."

*Sister Fund-Helen LaKelly Hunt*

At the Sister Fund we want to listen better to the grantees, have an interactive newsletter, publish their words, co-create ourselves with feedback from the grantees, instead of isolation. We have to be able to speak and to be able to listen. The West trains people how to speak, listening is seen as passive, listening is very powerful. It is a miracle, to be open to where connection and community is happening. Open to receiving instruction from something so much bigger than us. We always question how to do better grantmaking; there are no pat answers, we are in process, making as many mistakes as anyone does but it is important to be asking the questions.

*Phone Spirits*

A number of participants are involved in a group called the Phone Spirits. They grew out of the Santa Fe conference and have been meeting on the phone ever since 1998. One of the members commented, "We do a lot of class work, that is the basis from my perspective on intimacy. Class is the last thing that anyone wants to talk about. We work really hard, we have open conflict. We work really hard." Another member of the Phone Spirits said, "Out of that intense pain and conflict that we experience there is this deepening, there is love for each other that is the source for what is going to emerge. We don't know what that is. We struggle every time we get on the phone, deepening and deepening. Maybe that is the model."

# GROUNDING THE VISION AND TAKING IT HOME

## Nainoa Thompson

C. Nainoa Thompson, navigator and sail master and Director of Programs for the Polynesian Voyaging Society's double-hulled canoe Hokule'a, has inspired and led a revival of traditional arts associated with long-distance ocean voyaging in Hawai'i and Polynesia—arts which have been lost for centuries due to the cessation of such voyaging and the colonization and Westernization of the Polynesian archipelagos.

Nainoa spoke about the need to reclaim Hawaiian culture both for the good of the Hawaiian people but for all peoples as well. "We are just watching decline in these islands, We just take what is left before our neighbor does, I am afraid for the world of our children until we change our culture." He talked about the trauma in the Hawaiian family structure itself, the need to reclaim the sense of dignity, deep inner life, strength, courage and intelligence used by ancient Hawaiians.

A primary theme running through Nainoa's talk and the work of the Polynesian Voyaging Society is to build community. Building the canoe was a primary vehicle for and result of this community building. They brought together the kahuna, the elders who taught them about many art forms: making sails, making the hull, and about making masts. They had young people there from the beginning learning from the elders.

In Nainoa's words, "These are powerful deep tools of learning. This community I am speaking of is emerging, growing, redefining itself all the time as it continues to sail. It is an incredible community of people not from ethnic group, yes Hokule'a might represented by modern Hawaiian culture but our understanding of culture is everybody participates. It becomes more about a culture of powerful shared values, being a part of something very special. We need to be able to rewrite our history. That is our obligation; we can not be defined by those who don't understand us. The obligation is ours.

Understanding our culture in a dignified way is the foundation for inner health. The vital need for our people to be proud of who they are, to emerge in the 21<sup>st</sup> century along side other cultures is critical. It is critical that our multiethnic culture here achieves a sense of peace. I am tired of the poverty that I see in our rural areas; we are not going to find solutions by bashing our history and blaming someone else. We are going to find it by getting up and taking care of ourselves, one family at a time. Under all of that is the foundation of strength of the culture.

We are contemplating our next voyage. We will probably head West from here and sail around the island Earth. Our vision is not clear, but our instincts say it is important voyage. Don't underestimate the power of mana--spiritual strength, though you may not understand it. We think we would learn about being with global cultures, and seeing our global environments, hope that with the courage and the where-with-all, we can come up with the

vision and intention then come home, build a healthy future which all our children deserve, based on profound values. We need to learn how to simply, rebuild our relationships with our homes and each other. It is our hope that in doing that we can find a place that is peaceful to be in.”

## **What’s Next in Spirit and Philanthropy**

There were three broad approaches to the question of what is next. One approach was to consider what the forms and activities might take Philanthropy and the Inner Life further. Another approach was to articulate where we are in the larger movement of philanthropy. Still another was to examine in a more contemplative manner the ways race, class, and gender affect our thinking and work in hopes that we will move forward more consciously.

The group as a whole came up with the following suggestions.

### **Self define**

- Clarify definitions of what we mean by philanthropy, inner life, spirituality, and social justice.
- Create common language around philanthropy and the inner life, or create space for dialogue about common language
- Write a Declaration of Philanthropy and Spirit
- Keep questions alive, keep tensions articulated

### **Learn**

- Map who is doing what within the realm of Philanthropy and the Inner Life.
- Involve more people of color or people under 40.
- Find, write up and disseminate case studies on dialogues and partnerships between grantors and grantees.
- Research practices that lead philanthropists to do this work more deeply.
- Create settings where people enter into one another’s forms of spiritual practice that informs how they do their philanthropy. Don’t water down practices.
- Create a set of specific best practices.

### **Disseminate**

- Create a website where one could find all of the above, where one could be in communication and dialogue with others.
- Write journal articles about new models.
- Compile and publish writings.
- Be strategic about moving all this information out.
- Communicate and collaborate with other groups that are also grappling with new models.

### **Educate**

- Develop specific curriculum on philanthropy and the inner life.
- Educate new philanthropists on a broader, more spirited way to do philanthropy.
- Legitimize this impulse by explaining how this fits into the larger philanthropic context.
- Apply couples counseling and family systems principles to philanthropy.

- Write a chapter about spirit and philanthropy for the new edition of Inspired Philanthropy.
- Hire a staff person to implement some of these ideas.

### **Forms for Gathering**

A variety of forms were suggested that would aim to accommodate the different functions that currently exist.

- Hold meetings with the open space format allowing for participants to self-select activities and resource people. This would allow those who wanted to follow a topic in more depth to do so and allow those who wished to remain primarily in meditation to do so.
- Hold smaller groups that would spend time in “retreat” mode around deeper issues in philanthropy.
- Hold regional meetings to reach out to a larger number and different kind of philanthropist and to keep the conversation active.
- Continue and increase mini-meetings at already existing gatherings of funders such as the Council on Foundations, Women’s Funding Network, and the National Network of Grantmakers.
- Initiate small groups connected via email and the website to focus on particular interest areas such as dealing with race, class, gender inequities.
- Encourage anyone in this loose network to go forward with any model or workshop or activity it feels moved to without waiting for direction from the Working Group.

### **Dealing with Inequities in Everything to Do: Class/Race/Gender**

One group explored how racism, sexism, and classism influence our individual and collective thinking, feeling, and actions. They emphatically believe that we all need to continually create space for examining these issues in our daily work. This group summarized their discussion with the following thoughts. They intend to continue to be in touch via an email listserve and welcome any other interested people to join them.

- When we bring spirit into philanthropy we open our hearts, and therefore we open ourselves to the pain of the world.
- We need to sit with this pain and not be overwhelmed with it.
- Spiritual practices help us do this (help us cultivate compassion).
- An essential truth of spirit is the interconnectedness of all things.
- We believe that the deep pain of racism, classism, and sexism is the separation that they create - the loss of connection.
- If we take spirituality and philanthropy seriously, we cannot ignore these separations between us - including those between donors and activists.
- To expand the scope of spirituality and philanthropy we can make a commitment to sit together, acknowledge our pain, heal and create connection, share our different "currencies" as activists and donors, and work together to create a better world - starting with our own staffs and grantees.

- A necessary ingredient to such work is the safety and trust that these gatherings provide.
- We find that addressing these separations are a critical part of the work of Spirit and Philanthropy because these inequities are interwoven into the fabric of everything we do.

## **Conclusion**

This group came together to ask how can quiet, reflection, and meditation help us to create a healthy mutual interaction between grantors and grantees as we all work to be part of a just, caring and sustainable world. The community of individual donors, institutional funders, and grantees that comprise Philanthropy and the Inner Life continued the process of bringing definition and action to the ideas of spirit and philanthropy.

The participants of this conference are in the process of taking a broader look at their giving, becoming more conscious, and examining their successes and their shadows. Philanthropy involves far more people than those with wealth. We are all givers and all receivers, and at the same time, because of the concentration of wealth in the hands of the few, we honor the very real tension and power dynamic that is currently part of philanthropy.