The Heart of Giving

Servant-Leadership and Purposeful Philanthropy

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Chances are high that you wear one or more of the following hats: Philanthropic donor, volunteer, nonprofit leader, fundraising professional, and/or board trustee.

Almost everyone who embarks on the journey of purposeful living eventually becomes both a philanthropist and a servant-leader. One person may give millions, another a few dollars, while others time, but the principle they follow is the same: the more you give the more you get back. This is not to say that philanthropists give with the sole intention of getting back—it only means that a basic principle of life is that you get back from the universe what you put into it. If you open your heart and your pockets to the world, you are likely to be fulfilled in return. The task for us every day is to choose how to serve.

Purposeful philanthropy also has deep meaning for the millions of people who work as paid employees or as volunteers at one of the more than one million not-for-profit organizations here in the United States. The call to give—and to give back to others—finds contributors, volunteers, and paid staff of nonprofit organizations working together as servant-leaders who are involved in purposeful philanthropy.

The spirit of servant-led philanthropy is one of authenticity. It comes from a core "call." Calling is the "inner urge" to give our gifts away. We heed that call when we offer our gifts in service to something about which we are passionate.

I settle into the taxi, hoping to get a bit of work done before my upcoming meeting. As the driver pulls away from the curb, I open my briefcase and take out a folder. Even as I try to focus on my papers, I can see from the cabbie's face in the rearview mirror that he wants to talk.

"So, whattayou in town for?" He asks.

"I'm giving a speech. A presentation to some businesspeople," I say, hoping to make it sound uninteresting so the driver will leave me alone.

He doesn't take the hint. "Oh, yeah? What's it about?"

I'm not interested in giving the speech twice, so I offer the *Reader's Digest* abridged version. "Hearing and heeding your life's calling—doing the work you were born to do."

My cabbie scoffs. "That's a good one. You gotta section on how to make a million bucks while you sleep, too?"

Now he has hooked me. "You sound skeptical."

"Hey look, what am I supposed to say? Your life is 'calling?' C'mon, I drive a cab here. What's that got to do with a calling?"

I close my folder and catch the driver's eye in the rearview. "You weren't born to drive a taxi?"

He just laughs.

"But you like your work well enough?"

He shrugs. "I guess it has its moments."

"I'm interested. What are those moments?"

"You mean besides quittin' time?"

I lean forward and put my hand on the front seat. "I'm serious. What is it about this job—besides the money—that you find satisfying? What is it that gets you out of bed in the morning?"

He smirks as if he is going to say something sarcastic but then stops. Gradually, his face softens. He laughs a little and says, "Well, there's this old lady."

I stay silent and he continues. "A couple times a week, I get a call to pick her up and take her to the grocery store. She just buys a couple items. I help her carry them into her apartment, maybe unload them for her in her kitchen, sometimes she asks me to stay for a cup of coffee. It's no big deal, really; I'm not even sure she knows my name. But I'm her guy. Whenever she calls for a taxi, I'm the guy that goes."

I wonder why. "Does she tip well?" I ask.

"Not really. Nothing special, anyway. But there's something about helping her that, I dunno, just makes me feel good. I guess I feel like I'm making a difference in somebody's life, like somebody needs me. I like to help out."

"There's your calling right there," I say.

"What?" The smirk returns. "Unloading groceries?"

"You said you like to help out. That's a pretty clear expression of calling."

A smile spreads across his face. "Well, I'll be damned. I guess that's right. Most of the time, I'm just a driver, but when I get that chance to help somebody—as long as they're not some kinda jerk or something—that's when I feel good about this job. So, whattayou know? I got a calling."

He is silent for the rest of the short trip. However, I can see his face in the rearview mirror, and even when we hit the midtown traffic he is still smiling.

Each of us, no matter what we do, has a calling. Of course, some work fits more naturally with our calling, but every situation provides us with some opportunities for fulfilling the urge to give our gifts away. Satisfaction in life will be due to how well we take advantage of those purpose moments. What this requires, though, is that we *heed* our calling, that we learn what to listen for. We need to recognize, as the taxi driver did, what our calling really is.

So, what are the lessons to be learned from this story?

First, the Call Comes from a Caller

Each one of us is called. Where does the call come from? There is no calling without a Caller—a Source larger than ourselves. Calling is an inherently spiritual concept that challenges us to see our lives in relation to our deepest beliefs. The concept of calling is founded on the recognition that we are all born with Source-given gifts to fulfill specific purposes on earth. Our calling emanates from a Source much larger and more powerful than we are. No one fully understands all that is "hard-wired" into us, but it seems clear that we come into the world already endowed with unique gifts. These gifts have the potential to enrich our lives immeasurably if they are unwrapped and given away. Yet, calling is not revealed to us automatically at birth. Heeding our calling requires an effort on our part. Quite simply, we must *listen.* We must choose to heed what summons us.

Second, the Call is Personal

There are as many callings in the world as there are people on the planet. This isn't to say that other people might not do the same things we do or that they can't be passionate about the identical issues that compel us. It does mean, however, that each of us is called directly; no one else is called to do the same things we are, *in the same manner we are.* Our calling is our embedded destiny; it is the seed of our purpose. We express calling not only through giving, but more importantly, through *whom we are willing to be when we give. Heeding* our calling involves a conscious choice to be authentic. Our calling is like our signature or thumbprint, uniquely ours. Heeding our calling means we realize that we are here to contribute to life on earth something that no one else can contribute in quite the same way.

THE CALL OF SERVANT-LEADERSHIP

As many philanthropic professionals and contributors know, Robert K. Greenleaf was someone who listened to his heart and wound up heeding his own calling through his writings on the-servant-as-leader philosophy. The concept of servant-leadership originated in his 1970 entitled, *The Servant as Leader.* Greenleaf spent most of his organizational life in the field of management research, development and education at AT&T. Following a forty-year career at AT&T, he enjoyed a second career that lasted another twenty-five years. During this time, he served as an influential consultant to a number of major institutions, including: M.I.T., the Ford Foundation, and Lilly Endowment Inc., to name but three. In 1964, he founded the Center for Applied Ethics, which was renamed the Robert K. Greenleaf Center in 1985.

Greenleaf distilled his observations in a series of essays and books on the theme of the servant-as-leader. Since 1970, nearly a half-million copies of his books and essays have been sold worldwide. Slowly but surely, Greenleaf's servant-leadership writings have made a deep and lasting impression upon philanthropic donors, professionals, and leaders.

Who is a servant-leader? Greenleaf said that the servant-leader is one who is servant-first. In *The Servant as Leader* he wrote, "It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead. The best test is, 'Do those served grow

as persons; do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society; will they benefit?'"

Greenleaf goes on to say that authentic servant-leaders have the capacity for listening to their call. Servant-leadership is an idea that begins with the call, but which leads to concrete action. It is a philosophy of life—one deeply grounded in the notion of providing service and leadership for the betterment of organizations and society.

We are called to be both leaders and followers in different parts of our lives. Servant-leadership encourages us to balance leading and serving within our own lives. For those of us in leadership positions, it reminds us that our primary responsibility is in serving others. For those of us in follower positions, it encourages us to look for situational opportunities to provide leadership. The end result of this moving back and forth between leading and following is to enhance our lives as individuals, and to raise the very possibilities of our many institutions.

Consider the following list of leadership authorities: James Autry, Warren Bennis, Ken Blanchard, Peter Block, Stephen Covey, Max DePree, Peter Drucker, Francis Hesselbein, Joe Jaworski, Jim Kouzes, M. Scott Peck, Peter Senge, Peter Vaill, Margaret Wheatley, and Danah Zohar. What do these authors have in common? All of them have been influenced by the writings of Greenleaf; and, these and many other leadership authors are increasingly calling attention to the growing influence of Greenleaf's concept of servant-leadership.

LARRY'S STORY OF CALLING

In the early 1990s, I invited a handful of notables in the field of fundraising and philanthropy to share with me their thoughts on servant-leadership and philanthropy for possible inclusion within an article that I was writing. Their shared insights never made it into the published article and have languished unread ever since. Here, for the first time, Richard and I are happy to share with you these observations on servant-leadership from a few of the twentieth-century giants in the field of philanthropy and fundraising. It is clear that servant-leadership has become an important calling for purposeful philanthropists and those who operate our nonprofit organizations. The following deep reflections from thought-leaders in philanthropy serve to underscore this belief.

James Gregory Lord, consultant and author, *The Raising of Money: 35 Essentials Every Trustee Should Know*, shared this insight with me:

> The idea of serving before leading is one of the roots of the philanthropic enterprise. The practice of one giving before asking—that is, the practice of a person making his or her own financial commitment before asking another to give—is pure servant-leadership. When that happens, the person goes forward to ask another by example, rather than by advice.
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> In *The Philanthropic Quest* I suggested that the central tenet of servant-leadership is that one who leads thinks of him or herself as a servant first—serving those who follow. When we, as servant-leaders, invite someone to join in making a philanthropic investment, we ask ourselves, "Does it seem that this is a good and growthful thing for this person to do?" This is clearly a different approach from thinking you are taking something away from a person when you invite investment.
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> I see the servant-leadership concept as central to being able to distinguish the conventional "arm-twisting" brand of fund raising from what I call "the philanthropic quest." At base, the quest asks us to respect the donor. So does servant-leadership. Both are obsessed with the notion that human beings (donors included!) are, at heart, good folks who want to do the right thing. It's merely our job as professionals—as servant-leaders—to give them a way to bring what's inside them outside.

The late Milton J. Murray (1922–2009), founder of Philanthropic Service for Institutions and a past recipient of NSFRE's Outstanding Fund-Raising Executive of the Year award had this to say:

> Greenleaf's thoughts have always intrigued me because they seem to verbalize in a very precise way what I believe are excellent values to be found in the professional who works in the field of philanthropy. For example, we like to be thought of as idealists—professionals who are committed to improving society. Greenleaf said, "There is a place for the lone idealists, but their servant-leadership will have much greater influence if they become institution builders and take their stand for ethical quality within those institutions where it will have the effect of supporting the performance of large numbers who otherwise might falter. I have cast my lot with institution building." That inspires me to stay on track professionally with a good cause, and to continue to build it.
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> As professionals, we have many opportunities to build our ego, although we are charged with the responsibility to make others—leaders particularly—to look good. This fact leads me to react positively to another

statement Greenleaf made: "As good a definition as I know is that maturity is the capacity to withstand the ego-destroying experiences and not lose one's perspective in the ego-building experiences."

Greenleaf's statement that "the most effective servants are those who can persuade others to go with them and who have learned to work in teams" really turns me on! I could hope that we—as professionals—would read more of Greenleaf and make his philosophy of servant-leader an important part of our competence. We would all be the better for this, as would society.

The late Henry A. Rosso (1918–1994), founder of The Fund Raising School, offered this cogent insight:

Servant-leadership, to me, has always been an expression of the spirit, a commitment to perform, to give oneself beyond our more selfish needs. Servant-leadership is the volunteer who goes beyond the ken, serving because the work returns a spiritual satisfaction and not a monetary one. The servant-leader gives because of the very joy of giving and not in anticipation of applause, notoriety or any other form of public acclaim.

It has always been my feeling that fund raising is servant to philanthropy, and that those of us who work in Sy Seymour's vineyards do so because we believe it is a privilege to help a person to do what they really want to do; volunteer their spirit, their energy, their talents, and give of their resources because of the infinite joy of doing it quietly, selflessly in service to some public good.

It is thrilling to me to see younger people entertaining the profession of fund raising because they want to make a difference in life through service. It is equally thrilling to witness the dedication of an older person who gives up a better paying position because of an ideal, a reaching out, and an opportunity to become involved in something that will give meaning to their life. I have witnessed this often in the classroom, and it is an exciting experience to witness.

Finally, the late James P. Shannon (1921–2003) was editor of *The Corporate Contributions Handbook* and senior advisor to the Council on Foundations. Jim served as executive director of the General Mills Foundation from 1980 to 1988, and he wrote the Afterword for *The Power of Servant-Leadership* (Greenleaf/Spears; Berrett-Koehler, 1998). Jim was a friend of mine who shared this big-picture perspective with me:

In his years as vice-president at AT&T, Robert Greenleaf was really a company talent scout for "comers" among young middle managers. In that role he discovered empirically that his most promising in-house

discoveries were what he came to call "servant-leaders." After taking early retirement from AT&T in favor of fulltime consulting and teaching, he learned that government at all levels, the non-profit sector and academia are also searching for servant-leaders.

Even before Dr. Karl Menninger warned grant-makers that "grant-making can be harmful to your mental health," Greenleaf was saying that the best philanthropists and non-profit executives are persons more concerned about the common good of society than about their own personal agenda.

Since Greenleaf's death in 1990, a growing chorus of American writers (Robert Bellah, Peter Drucker, Amitai Etzioni, John W. Gardner, James A. Joseph, Brian O'Connell, Robert Payton and Paul Yivisaker) have been telling us that the good old American "habits of heart" and our traditional commitment to community service are losing ground steadily to the more modern habits of hard-driving individualism and personal rewards.

Greenleaf's basic thesis that a pluralistic democratic society depends for its survival on its ability to produce successive generations of servant-leaders, in every discipline and on every level, is steadily gaining acceptability in our culture.

As you can tell, all four of these respected leaders see servant-leadership as being at the heart of purposeful philanthropy. So do we. Perhaps you do, too.

THE HEART OF PURPOSEFUL PHILANTHROPY

The following ten heartfelt characteristics are central to the development of philanthropic donors, professionals, and leaders as servant-leaders:

1. *Listening*: Servant-leaders focus on listening intently and reflectively to others in order to identify and clarify the vision and voice of a group of people. This is a powerful skill in any environment, but especially within philanthropic institutions.
2. *Empathy*: Servant-leaders strive to understand and empathize with others. They accept and recognize others for their unique gifts and spirits. We assume the good intentions of others.
3. *Healing*: Learning how to help heal difficult situations is a powerful force for the common good. We recognize that we have an opportunity to help make whole those people and institutions with whom we come in contact.

4. *Persuasion*: Reliance upon persuasion rather than using our positional power in making decisions is essential to us as servant-leaders. We are effective at building consensus within groups.
5. *Awareness*: Self-awareness strengthens our servant-leader relationships. Awareness aids us in understanding issues involving ethics and values, and it enables us to approach situations from a more integrated, holistic position.
6. *Foresight*: The ability to foresee the likely outcome of a given situation is a characteristic that enables us to understand the lessons from the past, the realities of the present and likely consequences of a decision for the future. It is deeply rooted within our intuitive mind. Moreover, it is key to creating long-term, meaningful change.
7. *Conceptualization*: Servant-leaders seek to nurture their abilities to dream great dreams. This means that we must be able to think beyond day-to-day management realities.
8. *Commitment to the growth of people.* Servant-leaders believe that people have an intrinsic value beyond their tangible contributions as workers. As such, we are deeply committed to the personal, professional, and spiritual growth of everyone.
9. *Stewardship*: Greenleaf's view of servant-leaders was one in which philanthropic donors, professionals, and leaders all play significant roles in holding their institutions in trust for the greater good of society. In effect, we all have a responsibility for being good stewards within organizations.
10. *Building community*: Servant-leaders seek to build a sense of community among those within our organizations. Greenleaf said in *The Servant as Leader*, "All that is needed to rebuild community as a viable life form for large numbers of people is for enough servant-leaders to show the way, not by mass movements, but by each servant-leader demonstrating his or her own unlimited liability for a quite specific community-related group.

These ten characteristics of wholehearted servant-leaders are by no means exhaustive. However, they serve to communicate the power and promise that this concept offers to those who are open to its invitation and challenge.

PURPOSEFUL PHILANTHROPY THROUGH SERVANT-LEADERSHIP

The promise of purposeful philanthropy through servant-leadership takes place in a world that is increasingly glutted with information and yet starved for meaning. Those who provide leadership within our many

philanthropic organizations have a unique responsibility to search for and articulate meaning for the groups they lead. Servant-leadership teaches the value of building relationships, using persuasion in decision making, understanding the use of foresight, and other elements that are essential to creating meaning.

Wholehearted servant-leadership forms a powerful set of behaviors that can be practiced by philanthropic donors, professionals, and leaders in every organization. Servant-leadership is not a tool. However, individuals and organizations have found it to be most helpful in times of transformation. The trust that results from servant-leadership has helped philanthropic organizations and individuals to weather many challenges.

TRUSTEES AS SERVANTS

Another area for servant-leadership is its role as the heart of board trusteeship. Greenleaf wrote extensively on servant-leadership as it applies to the roles of boards of directors and trustees. In his essay, *Trustees as Servants*, Greenleaf urged trustees to ask themselves two central questions: "Whom do you serve?" and, "For what purpose?" Servant-leadership suggests that boards of trustees who choose to act as servant-leaders can help to create institutions of great trust.

The opportunities for trustees to practice one of the wholehearted servant-leadership traits—that of healing—are virtually without limit. Greenleaf's challenge to serve in a healing role is meant in a way that begins with a commitment to heal one's self, as well as healing relationships and other divisions. The best efforts to serve cannot succeed unless those efforts are reflected internally as well as externally. Servant-leadership challenges each of us to look into our own heart and to make purposeful choices that will lead to a deepening commitment to others.

THE HEART OF GIVING

What is calling you today? What "inner urge" do you feel to give your gifts away? Heeding our calling is a deliberate choice to use our gifts to serve others and make a purposeful difference in the world. Our calling is expressed through service to others. We come alive when our efforts make a difference in other people's lives.

Having a purposeful approach to philanthropy is more important than ever before. The following three tips will help you to be more intentional when it comes to heeding your call:

1. Take a look at all the gifts you made last year and rank them by what provides you with the greatest sense of meaning and fulfillment. When we give to causes for which we are truly passionate, the effect is wholehearted—we receive as much or more than we give!
2. Highlight the organizations with which you are involved personally—either as a volunteer, board member, or on a committee—and note the amount of time given. Establish a "purposeful philanthropy plan" that includes why you give, how you give, and your guidelines for giving. Giving from the heart is one of life's greatest joys. When we do that, we change other's lives, as well as our own.
3. Name the organizations you serve or support where you can clearly articulate their purposeful mission. When we are involved personally in a cause or an organization, our involvement is likely to be longer lasting, and we are more likely to tell others.

As we mature on the path of purposeful philanthropy through servant-leadership, there is a tendency toward wholeness. At the same time, as our giving grows, we tend to reap more rewards. Often we end up with a wonderful problem: how to give away more and more. Then, since we tend to get back what we give, this problem gets larger and larger. Soon, we may be wrestling every moment with the challenge of how to receive and give large amounts of our resources away. We were born to wrestle with problems, so if we are going to be doing it anyway, this is not such a bad problem. In fact, it is a high calling.

ABOUT THE AUTHORS

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