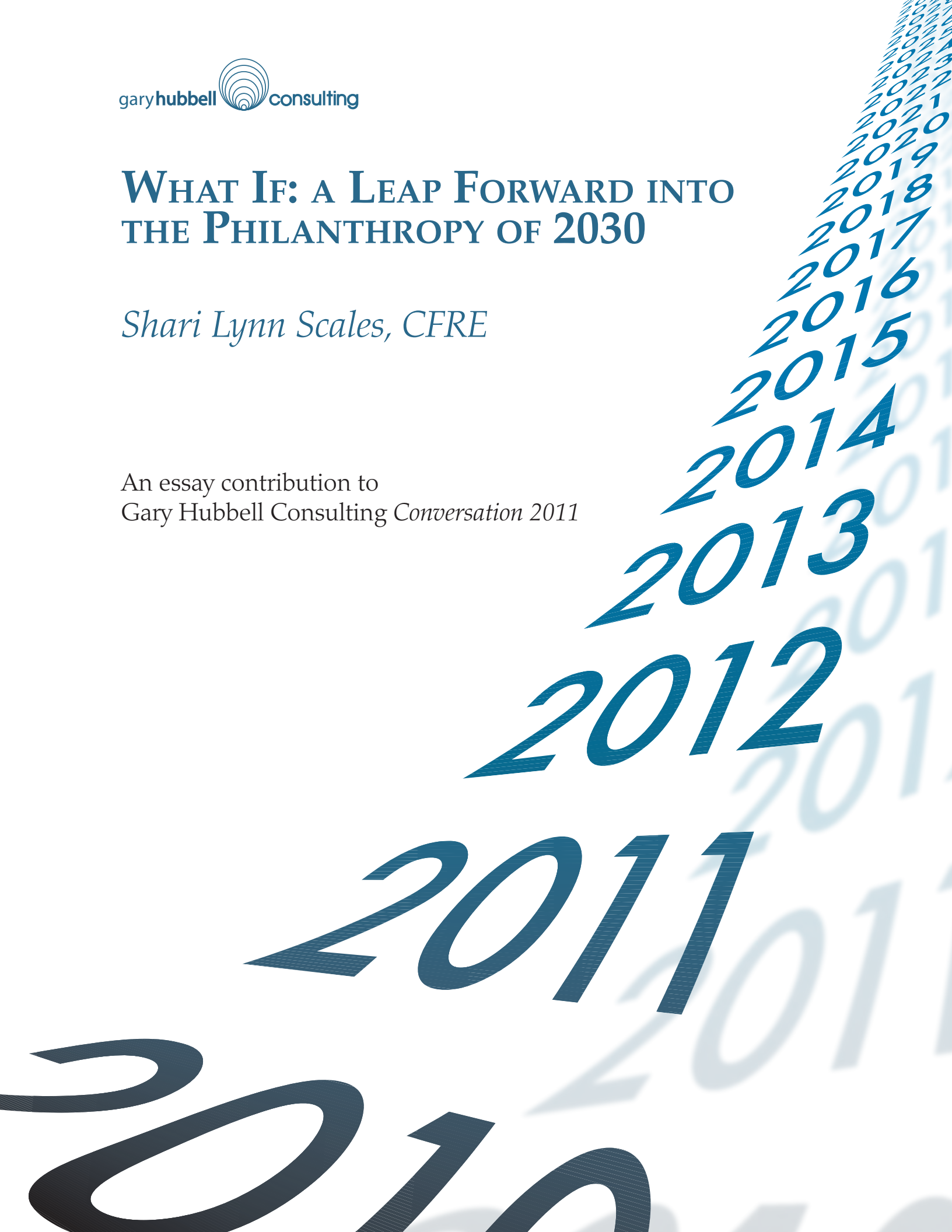


WHAT IF: A LEAP FORWARD INTO THE PHILANTHROPY OF 2030

Shari Lynn Scales, CFRE

An essay contribution to
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ABOUT GARY HUBBELL CONSULTING CONVERSATION

Annually, Gary Hubbell Consulting convenes and hosts a small hand-picked group of social sector professionals from throughout North America for three days of intense dialogue and critical thinking. We strive to create a thought-provoking, mind-opening, and stimulating conversation about philanthropy, organizational leadership, and social sector change. This deep exploration of the nature and challenges of the philanthropic environment is intended to engage, inform, and inspire senior leaders to be catalysts for change in their own organizations and communities of influence. With each *GHC Conversation*, we seek to establish the seeds of a continuing and enriching network that nourishes us as individuals and helps each of us change how we converse, inspire, and seek new dimensions of philanthropy.

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Shari Scales serves as Vice President for Advancement at George Fox University, a private Christian college nestled among the rolling vineyards of wine country in Newberg, Oregon. She served as executive director of neighboring Providence Newberg Health Foundation for eight years prior to joining the GFU team in 2009.

Shari's career in development began in 1992, and by 1996 she accepted her first leadership role. She started with the Legacy Health System in Portland, where she served as director of development for three foundations. In the late 1990s, she was assistant director of development for the Society of Jesus–Oregon Province. While at Providence, Shari successfully led a multi-million dollar capital effort to fund the construction of Providence Newberg Medical Center, the nation's first Gold LEED certified hospital.

Knee-deep in a \$40 million campaign readiness study, Shari's top priority now is repositioning the advancement team for optimal performance in a dynamic philanthropic environment. She is calling upon everyone from gift officers to gift entry specialists to the President to be the vision-casters and philanthropic facilitators needed to foster deeper connections among alumni, parents, students and others in more meaningful ways.

Shari is indebted to early mentors who helped shape her skill and approach in development, among them, Gary Hubbell. As a result, she has developed her own passion for mentoring others, from peers in professional organizations including the Willamette Valley Development Officers and the Association of Fundraising Professionals, to her two sons, D.L. (8) and Diego (3). "The highest honor granted to me by God has been that of mother," she says. "Finding the balance in being Mom to my two boys while serving in a leadership role at Fox is a challenge I prayerfully accept. God has incredible plans for each one of us and I am honored to help others, especially my own family, discover their unique calling in life."

This is Shari's third *GHC Conversation*.

WHAT IF: A LEAP FORWARD INTO THE PHILANTHROPY OF 2030

By Shari Lynn Scales, CFRE

As I've sat mulling over this essay topic since last fall, a consistent thread of discontent has permeated my creative thinking and writing. How can I possibly think about the future of philanthropy—2030 to be exact—when I am not even sure about the philanthropy of next week? But the very question begs attention as I take my place in line with other impassioned non-profit leaders who understand that what we are doing is bigger than any one of us, that what we are doing matters. So, in that vein, we *must* answer the question: What *will* philanthropy look like in 2030? It is up to us to take a good, hard look and delve into conversation about this very poignant subject.

WHY PEOPLE WILL GIVE IN 2030: A HYPOTHESIS

In our attempt to ascertain the direction of philanthropy in the next twenty years, we must first throw out what we've come to know as the primary motivations for giving. I argue that, in the next several decades, the reasons why people give will change. We are in a "new normal" that is permeating our every action—from what we eat, to how we live, and why we give.

A decade ago, Independent Sector surveyed individuals who lived in contributing households, asking them a series of questions about why their household made charitable

contributions. The respondents' reasons for giving comprised the listing on the left in the table below.¹

Specific Reasons for Giving in 2001 (Independent Sector)	Reasons to Give in 2030 (Shari Scales)
They wanted to get an income tax deduction.	They want to be engaged in something meaningful.
Something is owed to the community.	Our world's ability to survive and thrive depends on it.
Those who have more should give to those who have less.	People understand the power of conjoined gifts to eliminate difficult challenges, solve complex problems and achieve greater good,
Their religious obligations or beliefs encourage giving.	Philanthropy is at the center of their moral biography.
They were personally asked to contribute.	They come to understand and are invited to reach their charitable aspirations.

Let's begin to unpack this hypothesis and talk first about the tax implications for giving. I firmly believe that by 2030, people will no longer give because of tax benefits. There may be none by then. The economic volatility that has permeated our lives in recent years is shaping turn-style decisions that Congress so readily transforms into law without fully addressing the implications on our country's non-profits. As U.S. citizens, we're not sure from one moment to the next whether and how our gifts count against the tax roles. As non-profit leaders, it will become up to us to lift up the more meaningful benefits of giving—spiritual fulfillment, emotional wholeness, a purpose-filled life, and global survival.

Consider the recent visit by two of our nation's top philanthropists—Microsoft founder Bill Gates, and venture capitalist Warren Buffet—to China in September 2010. The concept of philanthropy is largely non-existent in China, yet this is a country whose economic prowess has grown exponentially in a relatively short period of time. While some of China's billionaires turned down the invitation to meet with the two for fear they would get hit up for big donations, the dinner did attract 50 of China's ultra-rich to listen to the third richest man in the world and the chief of Berkshire Hathaway talk about ways to give to charity if,

¹ Independent Sector; *2001 Giving and Volunteering in the United States: Findings from a National Survey*; 2002; Washington, DC

of course, that's what the Chinese wanted to do.² By 2030, the "if" may not be an option. Imagine the positive global impact that a partnership between the wealthiest in China and America could have should the wealth be shared.

IS THERE AN APP FOR THAT?

Customary to the start of every workday, I sit with my CPU, sip my morning java, and sift through the mountain of electronic messages that gather and clog my IN box between midnight and 7 a.m. Earlier this week, among the superfluous SPAM was a subject line that read "New Matching Gift App for Smart Phones." Why not? Several on my own advancement team have been asking for more immediate ways to close gifts when they sit with donors, at least the ones who are more technically savvy.

So...what if by 2030 every mobile device connected instantly to Apps that told us that another family just became homeless and that we need only 20,000 clicks to rectify the situation—along the lines of a "GPS for the needy"? Or, how about an App that would engage seconds after a natural disaster, instantaneously gathering troops of volunteers, containers of supplies, and hordes of gifts to respond before more lives would be lost? What about an App for a one-year-old struggling for life because she was born with a malaise that now requires a rare transfusion to save her? Surely, among the world's 6 billion inhabitants, we can find just one willing to help. Surely in our technologically advanced, digitally managed world, the ability to create global impact through philanthropy will become ever more instantaneous.

A young software engineer, a graduate of George Fox University, visited with me recently, wide-eyed, filled with ideas, and ready to take action on subjects about which he is most passionate. As we've begun testing the readiness of our teams, our institution and our donor base to embark on the University's largest comprehensive campaign in history, recent interviews with constituents revealed an innate desire for more meaningful engagement outside and beyond their checkbooks, to inspire and transform lives—their own as well as those the organizations they love are impacting. What if a global convention of young software designers and entrepreneurs transformed work-to-live to work AND live and created split-second apps that could instantaneously connect people from across the globe to fight for and win an immediate cause?

² Ward, Clarissa and Enjoli Francis, "Gates, Buffett Talk Charity With China's Wealth," <http://abcnews.go.com/WN/gates-buffett-talk-charity-chinas-wealthy/story?id=11765965>; Sept. 30, 2010

And while I'm on the topic of young people, might I suggest that today's middle and high school personal finance classes included a segment on charitable tithing—a notion not simply tied to one's center or place of faith—but a matter of course in human survival: pay the rent, save for a house, budget for gas and groceries, and give to the local homeless shelter and World Concern every month.

GETTING THERE FROM HERE: LEADING FROM THE FUTURE

There are times of wakefulness and sleep in nature, in history and in people.³ We find ourselves amidst a time of extreme wakefulness (and abundant sleepless nights) as the incidents making daily headlines press and stretch our humanness in ways never before imagined. Where is our place in all the chaos? Otto Scharmer, in his revolutionary book *Theory U*, suggests we must not only lead from where we want to be—what he refers to as an evolution of consciousness of self—but we must get others to see that future as well.⁴ He argues that leading from the future requires a synthesis of three investigative angles: science (data); active research (let's tinker with the data); and a deeper consciousness of self (intuition).

In the philanthropic world, then, this means major giving becomes not merely both science and art, but science, art, and an evolution of consciousness. This deeper level of consciousness or intuition demands that the non-profit leader react and respond concurrently in real time and down field, bringing clarity to the purpose and potential of the fund-raised gift—for their teams, their boards, and their donors. Scharmer argues that we will not meet the challenges at hand or ahead if we do not change our intuitive condition⁵ --in other words, go deeper.

Leading into the future of 2030, it is our donors and potential donors who will become the ultimate beneficiaries of our sharpened intuitions. Paul Schervish, in his essay *Religious Discernment of Philanthropic Decisions in the Age of Affluence*, argues that what curtails greater charitable giving is the wealth-holder's lack of clarity about not only their financial

³ Bonhoeffer, Dietrich; *I Want To Live These Days With You*; 2007; Westminster John Knox Press, p. 23

⁴ Scharmer, C. Otto ; *Theory U: Leading from the Future as it Emerges*; p. 16

⁵ Scharmer, p. 17

potential, but their charitable aspirations.⁶ He further argues that a greater level of philanthropic discernment “will increase the probability that something will occur that has never before been possible in history: a level of wealth that the world has never seen before will accomplish what the world has never been able to do before.”⁷

Couple Scharmer’s dimension of a deeper consciousness of self with Schervish’s theory of philanthropic discernment and you begin to visualize the very real potential of giving in 2030. Honing one’s intuitive skill and ability demands that a leader enter into a continual process of discernment. According to Schervish, discernment is a process of decision-making in all realms of our extraordinary and ordinary choices.⁸ The truly discerned, intuitive philanthropic leader can develop a relationship-building plan whereby “discerned philanthropy” is the outcome—where extraordinary opportunities are offered, and donors who aspire to enter into those opportunities make extraordinary choices. It is our responsibility to illuminate our donors’ potential for them, to bring clarity to their aspirations, and to share in the future of philanthropy with each other. In a recent article, “Philanthropy Gets A Makeover”, philanthropist and Schnitzer niece, Kathleen Lewis, says donors and non-profits share equal responsibility for the future success of philanthropy.⁹

In the midst of planning for what will be our university’s largest and most comprehensive campaign in its 120-year history, and only having set foot merely on the campaign planning trail, we’re already developing strategies to approach this campaign with the next in mind. Asks are not made without thinking downfield. Visioning with our best donors becomes a conversation that is ongoing – one that demands lasting engagement, and in which deeper discernment is fostered.

This “Conversation” group is no different. There is something magical about convening a handful of nonprofit leaders and sticking them in a room with an issue to tackle and blank pages on which to attempt to solve, or at least get at the “why.” Like ripples in a pond once the pebble is thrown, we will depart from this place carrying new insights, renewed passion

6 Schervish, Paul G.; “Religious Discernment of Philanthropic Decisions in the Age of Affluence,” in *Religious Giving for Love of God*; Smith, David H., Ed.; Indiana University Press, Indianapolis, IN, 2010, p. 125

7 *ibid*, p. 127

8 *ibid*, p. 141

9 Row, D.K., “Philanthropy Gets A Makeover” in *The Oregonian*, Sept. 26, 2010; Oregonian Publishing Co., Portland, OR, pp. 04-05

for our work, deeper understanding of what leading from the future means, and will bring the ripples with us and thus, lengthen and broaden the conversation at hand. We leave this place connected in ways that a mere three days earlier, did not exist.

Now imagine taking this same conversation and broadening it to include with the non-profit leader, President, Board leaders, and an institution's closest philanthropic friends. What we know as the "ask" will take a very different turn, at least for those who are considered our closest, major donors. Sitting in conversation with the president, a science professor, two philanthropist couples, and a trustee to envision the place everyone has at the table to problem-solve will become the norm. Hanging out will replace the intro, proposal, Q&A, ask and close.

When Bill and Melinda Gates set out to create the Gates Foundation in order to address and potentially solve the world's greatest health challenges—I don't imagine that the world's top health organizations arranged appointments with the billionaire pair and individually asked them to put their charity at the top of the priority list. Rather, the Gates' realized that with that with that much wealth, philanthropy comes as an obligation. My sense is that it is a joyful obligation.

The point I am trying to make here is that our conversations with our major donors—with us as leaders leading into the future, at the top of our game with our intuitive consciousness—our conversations then go much deeper. The ask never comes up. It becomes a matter of course. Philanthropists will give because it makes sense—at the very core of who they are as human beings. Leading into 2030 with a belief in that simple premise, gives us part of the answer we are looking for. The rest is up to us.

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