

Index in Depth

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Number Two in a Series

The Philanthropy Index Guidebook outlines a seven-stage process for measuring your community's potential to build a charitable fund. To provide additional support for communities working with the Index, we offer a series of supplemental papers. Each paper:

- *Relates to a stage of the Index process.*
- *Addresses challenges that sometimes arise at that stage.*
- *Offers concrete, practical suggestions for meeting those challenges.*

These papers are available to Index subscribers both in hard copy and on the Index website: www.philanthropyindex.org.

This paper addresses issues relevant to Stage 2:

“Build and Bond the Leadership Team.”

“Why Are We Here?”: Bonding the Diverse Team

A central idea of the *Philanthropy Index* is that the spirit of philanthropy can guide the community to find the best in itself. Your group, the group that conducts the *Index* research, will need to show your community what philanthropy looks like, what it can do, what its power is. Your group can take the lead in finding new ways for the community to care for itself. You can model for everyone what a diverse and resourced group of people can do. Your group will set the tone for fundraising activities and grant-making activities that follow.

Can the spirit of sharing and giving and cooperating move out from your group into every neighborhood of your community, every corner of your county? This will be possible only if those in your group are committed to an open process. If group members are only “at the table” or just “providing information” your effectiveness will be limited. Your next step, then, is to find ways to bond your group together, to get everyone engaged in the process and keep them engaged all the way along.

Getting Down to It

So, you're at the table now. You've come to work on the *Index*. You've come together as a new kind of group, a diverse group that has gathered leaders in your community in a new way. The question now is: “Can we work together as equals?” A critical part of working together as equals is working to make sure that when you meet, everyone knows and feels that they are truly part of what is going on. Those people in the room used to having significant amounts of power, or used to deferring to those with power, may well find it difficult to stay focused on a process that involves listening to each person in the room. Those in the room from groups historically excluded from leadership in our communities — women, working class people, young people, African Americans and Latinos — may well be asking if they've been invited to offer token presence, rather than share in the real work and real power of the group. As you think about the people who make up your group, ask yourself what you expect to learn from each person at the table. Ask yourself how each person at the table can stretch you in some way that will be a benefit in your life. Ask yourself what you expect to contribute to the work of this group.

Asking such questions can lead to the recognition that you have a responsibility to speak what is on your mind and to contribute to the group. Knowing that others are asking these questions will underline your responsibility to listen carefully to everyone in the room. Each person at the table has unique resources to share and special knowledge to impart. Likewise, each person at the table will benefit from the whole process — probably in ways that could not have been predicted or expected at the start. It will be this confidence and this hope surrounding the process of sharing and learning that will sustain you if tensions move through your group.

EXERCISE

In your second meeting, you may want to try a simple group exercise that will allow everyone to practice listening carefully and attentively, and to practice addressing the whole group. Begin by asking everyone in the group to get a partner to talk with. One person plays the role of the interviewer; the other person is the interviewee. The interviewer will make three simple inquiries:

- 1) Tell me how you got involved in this *Philanthropy Index* group.
- 2) Tell me about a time when giving a gift turned out to be a blessing for you as the giver.
- 3) What do you expect to learn about giving from the work you're doing with the *Index*?

Allow five to seven minutes for the asking and answering of these three questions. It's important that the interviewer ask only the three specified questions. That way the interviewer can concentrate on listening attentively to the answers. The partners should then change roles and go through the same steps again. When the interviewing is complete, come back together as a group. Have each interviewer explain in three to four minutes what his or her interviewee said in response to the three questions. This will give the entire group information about each person in the group. It will call on each person in the group to listen carefully to a conversation partner. And it will allow each person in the group to speak about himself or herself to one other person in the group, and about their partner to the entire group. The exercise will also give you a quick inventory of the variety of experience and backgrounds that you have gathered together to do your *Index* work. The exercise takes about 45 minutes to complete. It is an exercise that requires that each speaker feel safe about sharing information about their own lives and feelings. If you have any reason to believe that any group member doesn't feel safe, you will want to postpone doing the exercise until everyone is ready to share on this level.

Another thing that can be helpful is to make sure you have in place basic Ground Rules for meetings. You may want to agree on these Ground Rules ahead of time and remind yourselves of them before each meeting. For any set of rules to be effective each person in the group has to

commit to abide by them. You may want to appoint one or two people at each meeting to monitor the observance of the Ground Rules and give gentle reminders about them as needed. This responsibility should be rotated so that each member of the group takes on this role during your time working together.

One place to start on Ground Rules would be with a list like this:

- 1) **Be present:** Listen actively, keep eye contact and respond to discussions.
- 2) **Release any need for a specific outcome:** Enter meetings without having already made up your mind.
- 3) **Focus on learning and discovery:** Find out more about the other people at your meetings. Find out what they know about your community that you don't.
- 4) **Listen as an ally:** Hear what all the people have to say as though you were on their side and working to support them. Later, you can disagree; but the first step is to hear what is really being said.
- 5) **Be open to giving and receiving honest feedback:** Talk openly and honestly about your work together, and about the difficulties that come up while doing it. It should be clear to everyone that no "cheap shots" are allowed.
- 6) **Share all relevant information:** Share with other members of your group what you know about the community that they may not know or may not have had a chance to learn.
- 7) **Be willing to discuss and/or bring up undiscussable issues:** Be willing to talk about the divisions that hamper your community's growth. Be willing to discuss racial and economic differences. These discussions are often difficult, but they will be essential if your group is going to conduct an effective *Philanthropy Index* process.
- 8) **Be willing to own your own feelings:** Use the pronoun "I" when you talk about your thoughts, ideas and feelings. This helps make it clear that these ideas and opinions are your own. It also helps in acknowledging that others in the group will have ideas and feelings and opinions of their own.

- 9) **Allow other group members to finish statements without interruptions:** Listen carefully to what each person in the group is saying, without assuming you already know what they might mean or think or do.
- 10) **Before bringing up an issue or a topic, decide whether it's relevant to the whole group:** Stay tuned in to what the group is working on and avoid pursuing personal agendas when participating in discussions.

These Ground Rules, or some similar set of guidelines for discussion, can be immensely helpful as you move to bond your group and learn about each other. You may want to add other rules that are important to your team. Some groups, for example, may want a rule about setting aside titles like “Doctor” and “Reverend” and going with people’s first names.

Whether you have a formal list of rules or not, you will want to make sure that every comment offered is responded to, even if it seems out of place or off the subject. Everyone’s contribution needs to be valued and acknowledged.

Stormy Waters

Your group will now be gathering information about your community as directed by the *Index*. You will be evaluating that information and trying to understand the sources it’s come from. You’ll be figuring out who is going to gather what information, and what part of the community they are going to go into to gather it. You’ll need to develop strategies for this. For instance, when getting information from the financial community, do you send only the business people in your group, or a businessperson and someone whose expertise lies in another area? When you are seeking information about the African American community will you send only the African American members of your group, or an African member and a Caucasian or Hispanic member? There are different issues of trust and of shared knowledge in each of these situations.

Other questions will come up as you evaluate the information. For instance, you may find that white people in the group trust the assessments that have come from white

sources, and that people of color trust the assessments from their sources. How do you weigh these differing judgments? These activities are ones that can introduce tensions in your group, and you may find that your meetings begin to be difficult.

What kinds of things happen in meetings when the waters get stormy? Sometimes we have people who talk too much and expect everyone to simply go along with them. Sometimes we have people who say nothing and feel left out and never come back. Sometimes we find that patterns of language and ways of speaking put us off, distract us or make us uncomfortable. Sometimes we may simply have a hard time understanding the words and the sentences as they are spoken by others who live in parts of the community unfamiliar to us.

At times like these, it’s important to keep moving toward the group’s goal of tapping the abundance in the community in order to make it a better place to live. Everyone in the room has a contribution to make to this, no matter what reason or motive they may have had for joining the group in the first place. It will be up to each group member to stretch his or her comfort zone. The group may then discover that even those who are hard to listen to have something essential to offer.

Another thing we often find is that there are racial and cultural differences, as well as gender and temperament differences, in the amount of emotion or passion that people bring to their speech. Some people tend to approach things in a manner that they think is factual and neutral and logical. Some people approach speaking as a matter of passion and intensity. It’s important that, if you’re one who feels that passion is an important part of speaking, you not dismiss those who speak neutrally and logically and carefully. It’s important that you not assume that they don’t care about what they’re presenting. Likewise, if you are one who approaches matters in a manner that you think of as reasonable and quiet and fair, you must not assume that people who present their points of view with passion and intensity are trying to overrun the group. There are many different ways to contribute to the group’s life.

Any group that is going to function well has to have a strong feeling and emotional component to it — after all, why would you be there if you didn't care deeply about your community? Likewise, any group that's going to make progress is going to have to have clear ideas that can be easily understood by others — how else will you be able to present your findings to the larger community? The diversity of tasks facing your *Philanthropy Index* group means you'll likely find the diversity of talents and approaches in your group to be an asset — and perhaps in unexpected ways.

Tapping Our Resources

It boils down to this: We need to work together in a diverse group because there are parts of the community we don't know. And if we want to tap all the resources in the community, we especially need to be talking to people who know things about the community that we don't. We need to be talking to people we may not normally talk to. This is where the blocks are in the information flow — in the places where people typically don't talk. If we allow the traditional divisions and fault lines — racial and economic — to govern our conversations and our access to information, if we don't cross those boundaries and make new choices, then we are choosing to be hampered by the old weaknesses that have haunted our communities in the past.

Those of you who have gathered to implement the *Philanthropy Index* are likely to be people who have confidence in your community's ability to solve its own problems. You are the core of a new leadership group. Guided by a new understanding of philanthropy, you can carry the spirit of possibility, hopefulness and generosity out into your community. This aspect of your work may be the most deeply transformative thing you do, for yourself and for your community.

Resources for Bonding the Leadership Team

Appreciative Inquiry: Change at the Speed of Imagination. Jane M. Watkins and Bernard J. Mohr. Jossey-Bass/Pfeiffer (2001).

Black and White Styles in Conflict. Thomas Kochman. University of Chicago (1981).

"Leadership for Change." Resource paper available for free download from *MDC, Inc.* at their website: <http://www.mdcinc.org>

The Thin Book of Appreciative Inquiry. 2nd edition. Sue Annis Hammond. Thin Book Publishing Co. (1998).

Training for Racial Equity and Inclusion: A Guide to Selected Programs. Ilana Shapiro. The Aspen Institute (2002). Available as free download at: www.aspenroundtable.org