

2014 Philanthropy Innovation Institute

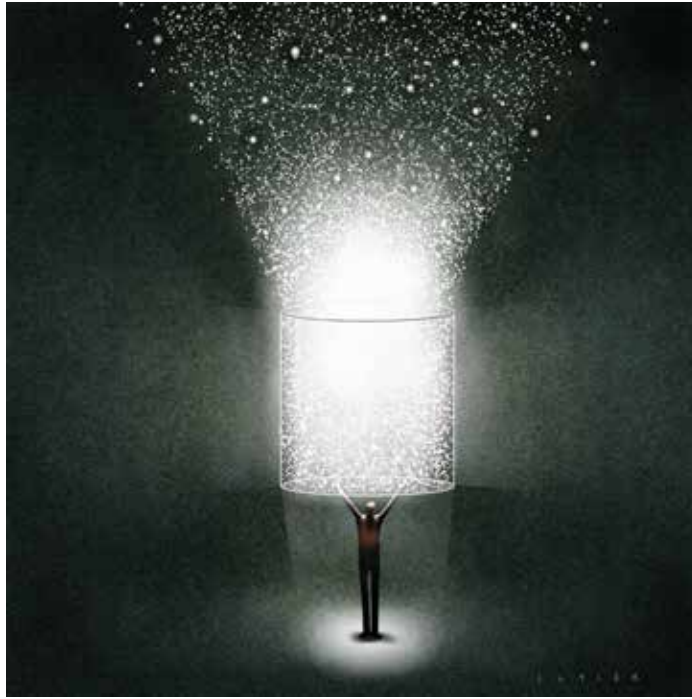
the alchemy of **GENEROSITY**



at Terranea in Rancho Palos Verdes, California

April 6-8

Kaiser
INSTITUTE



about this image

We created this image in partnership with Dave Cutler, an incredibly talented artist. It represents an *alchemical alembic*—the vessel of transformation. Any domain is a potential alembic. Your foundation. Your boardroom. Even your family. And many of the most powerful things wanting to happen can't until a space is designed with the right conditions—putting just the right things in and taking a few things out.

Dave also created art representing each of the 13 elements of transformation. Leaders who know how to apply these 13 concepts are *organizational alchemists*.

We are exploring three of these elements in depth during our time together.

cliffs at TERRANEA



experience a spectacular coastline

the PLACE

Terranea Resort's location in Rancho Palos Verdes introduces new generations to a part of Los Angeles that feels worlds away from the dynamic city, and to a beautiful and tranquil setting which is largely unknown.



As you round the final coastal bend before Terranea, you are met with a breathtaking sight: an oceanfront resort surrounded on three sides by the Pacific Ocean with Catalina Island across the channel.

Embracing the rich Mediterranean heritage of the Palos Verdes Peninsula, Terranea Resort's architecture possesses the feel of a carefully tended coastal estate that has evolved naturally over time. A gracious, old-world ambiance permeates the grounds, from the resort lobby and outdoor gardens, to private terraces and inviting courtyards with outdoor fireplaces.

Poised on 102 acres, this luxury eco resort offers 582 rooms, including a luxurious collection of residential bungalows, casitas, and villas. The resort also features The Links at Terranea, an award-winning, 9-hole par 3 golf course, the spectacular Spa at Terranea, three ocean view pools, and a collection of eight distinctive restaurants, bars, cafés, and lounges.



demonstrating IMPACT



sunday APRIL 6

5:00 PM

in the CATALINA ROOM

THINK: EXPLORE THE SCIENCE AND POTENTIALS OF GENEROSITY

James Doty, MD, Director of the Center for Compassion and Altruism Research and Education

Leanne Kaiser Carlson, Futurist, Kaiser Institute

In this opening conversation with neurosurgeon and philanthropist Dr. Doty, we explore how the kindest and most cooperative survive, the impact of compassion and altruism on health, and the desire in all people to be part of something bigger. We talk about why so many in our society who have their basic needs met still feel impoverished. And we consider how altruism creates meaning and ultimately leads to our own transcendence and healing. Enter into an extraordinary dialogue with one who understands generosity both professionally and personally from living through extremes of wealth and poverty.

6:00 PM

ADJOURN: ENJOY DINNER ON YOUR OWN

monday APRIL 7

7:30 AM

in POINT VICENTE

NOURISH: ENJOY BREAKFAST TOGETHER

8:30 AM

in the CATALINA ROOM

REACH: IMAGINE A MORE POWERFUL GENEROSITY

Leanne Kaiser Carlson, Futurist, Kaiser Institute

There is a generosity able to change our lives, transform our organizations—even change the future of the planet. It has the power to recreate relationships and unleash immense abundance. But it's not the generosity we know today. To get it, we must begin anew and imagine something entirely different. Look at why generosity has become so peripheral, how we limit its power, and what it takes for us to unleash its untapped potential.



THE ALCHEMICAL FOUNDATION: STAGING

Staging is how we build the matrix supporting a thing's emergence—how we design a habitat that shapes and nurtures the evolving form. Staging relies not only on a clear sense of what's necessary for something to *begin*, but also the ability to sequentially build the spaces supporting each step of its development.

1 ALCHEMICAL STAGES. Anything can be a stage—an experience, event, place, or even a conversation. Some stages limit and reduce. They're so constrained that nothing new happens, no inner shift takes place. There's no provocative and compelling encounter that shakes or inspires or transforms. On these stages we take our place and perform our roles. But we leave much the same as we entered. Alchemical stages, by contrast, change us. Some are so potent they imprint and alter us for life.

2 MATRIX VS MANIPULATION. Staging is the way we set things in motion. The purpose is not to force results in a one-to-one linear correlation where a “move” results in a prescribed result. Rather it's to create the container or overall context for something to manifest. The most potent things cannot be forced. They must be invited, evoked, and enticed. Alchemical development needs no manipulation. But it does require the right matrix.

3 LIFE STORY. Alchemical gifts arise from the donor's life story as much as the organization's needs. They create meaning from the past and open new chapters of growth and discovery. The outflow of generosity accelerates the inflow of energy into the life of the donor and becomes a path of potentiation.

monday APRIL 7 (CONTINUED)

9:30 AM

BREAK

9:50 AM

in the CATALINA ROOM

COMMIT: SHOW PROGRESS CONTINUALLY AND TRANSPARENTLY

Mark Duey, Head of Program Quality, Water for People

Donor investors crave new ways of seeing and experiencing impact. They urge us to show progress in forms that are more visual, continuous, and connected. Water for People began to innovate with reporting years ago, creating a culture of accountability and developing an Android-based tool to collect water system monitoring data so utilities, governments, and donors are well informed. Now they are launching something even more ambitious—an online platform called Re-Imagine Reporting that shows progress and impact. Look at this platform, talk about how it is being received, and imagine what is possible for you.

11:00 AM

in the CATALINA ROOM

DESIGN: COMMUNICATE IMPACT MORE VISUALLY

Matthew Scharpnick, Chief Strategy Officer, Elefant Designs

Data visualization is a kind of storytelling. It portrays a problem or impact clearly and powerfully. One stunning visual representation communicates in an instant what would otherwise take pages of words and photographs. Graphical storytelling is part of the future. Look at the most potent ways it is being done in the nonprofit world. And think about how to use these approaches to more powerfully show your donors the difference their gifts make.

12:00 PM

NOURISH: ENJOY LUNCH WITH YOUR TEAM

1:30 PM

in the CATALINA ROOM

EXPLORE: CONSIDER THE ROLE OF THE CDO IN DEMONSTRATING IMPACT

Steve Rum, VP for Development, Johns Hopkins Health System

Big and bold gifts come with expectations—that the gift will transform care, create something novel, and make a difference in people’s lives. Our prosperity depends upon more of these large transformational gifts. Yet there is little sustained effort in development to meaningfully evaluate gift investments. In this conversation we talk about what must shift in the role of the CDO as well as others in the health system. We explore what lies beyond glossy stewardship reports and how to develop a sustained culture of accountability.



THE ALCHEMICAL FOUNDATION: INCUBATING

In their infancy, some things need specialized protection and specialized nurturance—without it, the *bud never becomes the blossom*. Most innovations fail not because the idea isn't good, but because the habitat isn't right. Alchemical foundations provide more than money. They create incubation spaces.

1 MOVEMENT. When there's movement in the relationship with a donor, we know the next right thing to do together. We embark on an open-ended adventure where we imagine a possibility, launch an attempt, learn from it, and design the next iteration. We're always incubating the next and more elegant form, so engagement rarely stalls and falls into stasis.

2 RESERVE. Many organizations lack reserve. Everything is consumed by what's proven and necessary for survival today. The pressure for returns on each and every thing makes it impossible to wander, discover, and explore—and achieve unusual or surprising breakthroughs. There's no *breathing space*. Alchemical foundations preserve some small portion of total time and resource for experimentation.

3 HABITAT. Too often a donor's dream fails to take hold because it requires more than money to root and flourish. It may threaten political interests or established ways of thinking. Alchemical foundations bring many types of resource into combination. They create the initial conditions essential for success. Once incubated, an innovation can be managed and grown in the operational culture.

monday APRIL 7 (CONTINUED)

2:30 PM

BREAK

2:45 PM

in the CATALINA ROOM

ADOPT A TOOL: RECEIVE A NEW GENEROSITY CURRICULUM FOR YOUR STAFF

Leanne Kaiser Carlson, Futurist, Kaiser Institute

The people who work in our hospitals and clinics often know very little about philanthropy. What they do know is shaped by their prior personal giving experiences—which are often mundane. It's up to us to shift the perception of what the foundation does, the healing power of generosity, why it matters to our future, how we are innovating, and what they can do to help. See the unveiling of part one of a generosity curriculum designed to begin this conversation in your organization.

3:45 PM

in the CATALINA ROOM

EXPAND YOUR MIND: STRETCH AND THINK ABOUT THIS SEED THOUGHT

Lee Kaiser, Futurist, Kaiser Institute

Get ready for a MIND STRETCH as we end our day. Seed thoughts hold the essence of something provocative or surprising. In this seed thought we explore philanthropy as a spiritual practice and why if it is approached purely as a business arrangement, all the higher functions are not available. We also explore the three triangles or spanning functions essential in development.

4:00 PM

ADJOURN



THE ALCHEMICAL FOUNDATION: CONCENTRATING

Often we have the collective ability to accomplish something but lack the required *concentration* of the ability in a particular time and place necessary to precipitate movement. So instead of creating something new, we keep slipping back into the old equilibrium.

1 INTENSITY. Many transformations require peak intensity. Doing more with less intensity over longer periods of time doesn't produce the same effect. One exquisite donor experience may create greater impact than hundreds of mundane ones. A highly-energized philanthropic coaching relationship with a physician or board member may unleash movement more diffuse approaches will not. Often in our attempt at breadth, we dilute intensity and end up with weak results, or no result at all.

2 TIMING. There are moments when things are uniquely possible. Everything is aligned. It may be different a day from now or a week from now—the opening recedes. Alchemical foundations recognize particular moments when it's essential to concentrate effort and energy. In these moments they muster everything they have.

3 PRUNING. Doing too much of *what matters least* keeps us from concentrating enough on *what matters most*. We may think we need more resources, but what we really need is to release some things and dramatically exaggerate others. Pruning is an intentionality we bring to life. We no longer reflexively respond to what presents around us, or chase the myriad “shiny objects.” Instead we direct our awareness and energy.

C O U T L E F

tuesday APRIL 8

7:30 AM

in POINT VICENTE

CONNECT: ENJOY BREAKFAST AND EXCHANGE INNOVATIONS

Many organizations here innovate in remarkable ways. Look at the sign posted above each table to find an innovation that intrigues you. Then pull up a chair and join the conversation to learn what this foundation is doing.

9:00 AM

BREAK

9:15 AM

in the CATALINA ROOM

UNLEASH POWER: DELVE INTO THE ALCHEMY OF DEVELOPMENT

Kevin Kaiser, Corporate Intuitive, Kaiser Institute

Leanne Kaiser Carlson, Futurist, Kaiser Institute

Wild success, *disproportional success*, rarely flows from the basic mechanics of development. The basics are essential. But they aren't magical. They rarely unleash huge energy and movement, or return results that are vastly greater than inputs. For this we need a new set of approaches and skills. Then we enter the master domain—the *alchemical domain*. Prepare for a very different conversation as we delve into a set of tools and explore alchemical elements applied to philanthropy.

12:15 PM

NOURISH: ENJOY LUNCH WITH YOUR TEAM

1:30 PM

in the CATALINA ROOM

ACCELERATE: DEEPEN ENGAGEMENT AMONG CORE ALLIES

Theresa Pesch, Executive Director, Children's Hospitals and Clinics of MN Foundation

It's a frequent occurrence at Children's—someone makes an initial gift, possibly of a few thousand dollars, and ends up investing millions. These are not random occurrences. Nor do they simply happen because of the organization's compelling mission. They require intimate, thoughtful conversation. And they build as a result of careful ways of accelerating energetic momentum and deepening engagement. Look at the way this occurs and results in customized approaches for each donor.

tuesday APRIL 8 (CONTINUED)

2:30 PM

in the **CATALINA ROOM**

CONVERSE: TALK WITH A YOUNG FUNDRAISER

Kat Tiscornia, Fundraiser, Seattle Children's Foundation

Leanne Kaiser Carlson, Futurist, Kaiser Institute

Kat was a typical eighth grader until last spring. Then it all changed when she was diagnosed with a rare type of bone cancer—Ewing Sarcoma. Her treatment included 30 weeks of chemo and a surgery to remove five inches of her femur. Now she is raising money to help her doctor improve cure rates and treatments, and to reduce long-term effects from the disease. She says, “It helps me to know that my struggle is worthwhile and that I can make a difference in the world.” Join the conversation as we talk about her instinct to make life better for others even as she navigates her own path ahead.

3:15 PM

in the **CATALINA ROOM**

EXPAND YOUR MIND: STRETCH AND THINK ABOUT THIS SEED THOUGHT

Lee Kaiser, Futurist, Kaiser Institute

Get ready for a MIND STRETCH as we end our day. Seed thoughts hold the essence of something provocative or surprising. In this seed thought we explore the way philanthropic giving runs in families and how the hopes, ambitions, and values of ancestors are carried in us now—in our body's memory system or DNA. Philanthropy activates this ancestral DNA and enables new energies and abilities to flow through us.

3:45 PM

ADJOURN

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