

## THE FIFTEEN RULES OF PHILANTHROPIC FUTURISM

Find your purpose.

Simon Sinek is synonymous with the Golden Circle, the concept of starting with *why* as the purpose, *how* as the process, and *what* as the result. And while I appreciate the foundational elements of this approach, my take on “purpose” as both a guiding force and north star has been hijacked over the past decade by my exposure to those who preach a conscious type of capitalism where the definition of success is to chase the waves before 8:00 a.m. in their sleepy, yet gentrified, beachside towns because that is the Zen image portrayed in their self-help book subscription boxes.

The future is what we make of it, and to say that we need to spend our entire careers chasing one, single most important pathway is a dangerous anecdote for success. Philanthropy is not someone’s purpose.

I once was pulled into the conversations and design of a new “Chamber of Purpose,” an intriguing coming together of businesses practicing and championing a triple-bottom-line approach to business. It made sense on paper, there were a number of people I respected as part of the process, and it seemed like they had the energy and the expertise to move it forward. But after a while you could see through the bullshit.

The word *purpose* should have given it away, but I’m a sucker for change.

After all the pleasantries and goodwill around this project had evaporated, and the people who got stuff done in their communities were burned or bad-mouthed for not rolling over to the demands from sections of leadership, we all saw the purpose movement for what it really

is: business folks going through a midlife, failure-to-launch type of existential crisis. At the end of the day, all they wanted was either power (another CEO title) or clients for their consultancy side hustles.

Beware these kinds of actors in your philanthropy careers.

One of my first roles in the US was for an organization led by someone with these traits. I have never seen a nonprofit bring in so many unpaid interns month after month—hardly giving me a chance to learn their names, let alone what they actually did—which should have been a warning sign, but I just thought this must be how the country’s workforce operated.

I shudder to think back on these experiences and hope that impact investing doesn’t become their new “purpose” after their LinkedIn marketing or CBD-infused products tank.

So, no, I’m not a fan of the word *purpose*. In the end, just do what excites you and this will lead to career satisfaction. It’s also how you will be successful in applying a futurism lens to your work.

You see, philanthropic futurism in its simplest definition is seeing and understanding future trends and technology and then understanding and articulating how they can be applied today to solve and support the finding of historical, current, and future societal problems. Being a career generalist is how you can garner that kind of insight. Predicting the future is just the fun part; it’s really just a bet, yet one that can be better informed and calculated.

So why did I mention Simon Sinek when all I have done so far is to segue into a rant about a bunch of surfing frat boys? Well, I want to reaffirm I was not using his work as a Trojan horse to talk about my frustrations around a “Chamber of Purpose”; it’s actually because he hits the nail on the head around rules and values.

It may just be semantics here, but the *why* should not be confused for purpose. I think that has gotten blurred in the wash. The *why* is your values; it explains the *why* of your behavior. The rules underpin the *what*.

I always mention the importance of values to folks who are grappling with the conflict of who they are at work and who they are outside of it. Working in the social sector should foster a freedom, or comfort,

around intertwining both. You know, bringing your whole self to work, showing up, speaking up for what's right, and so on. At the end of the day, you must not shy away from who you are or you will be susceptible to being rolled over, and the purpose of this book is to inspire readers to espouse courageous leadership in all they do.

So start with your why, since, of course, Simon Sinek said so and has a really cool TED Talk on the subject. However, the why can be wired into your psyche by way of a values statement. And while I'll stop short of recommending a values retreat (even though that is indeed a trend that is occurring intergenerationally in philanthropy), I do encourage time for you to ground in, understand who you are, who you want to be, and how you will show up each and every day. These are the values that will guide your work both personally and professionally and will influence the decisions you make in uplifting your community.

My experience with values statements comes from a political background. If you want to run for office you must be able to withstand the ultimate question of motivation—Why are you running? You know when someone is running for higher office when they write a book that really gets to the crux of their being, what values fuel their public service, and how they are representative of the times. And trust me when I say that me writing a book that outlines my own values is completely coincidental.

My values are up on my personal website for all to see. I don't shy away from them, and neither should you with yours. Ultimately, it's who you are and, at a bare minimum, who you aspire to be.

The values I identified are future focused in nature and appeal to my sense of optimism and faith in our world to “get it right”—eventually. Because while there are amazing advances happening in our world and our sector (many of which are highlighted in this book), I ultimately wrote this book during a surreal moment in our time. We were captured by a global pandemic that provided plenty of time for reflection on the current state of our nation and how our lives can be turned upside-down in an instant. We realized that populism as our current guiding “vice” is fundamentally reactive and a danger to our economic and personal security. And while I won't get into the politics of it all, I will say

that America needs to become a fairer, more just, and kinder country, and that it will take time to heal its current divides.

This is the lesson here: your values must persevere and will ultimately help you triumph. My values have aided my own development and help me grow beyond my deep flaws as a human. I, like everyone else, am a work in progress, and I'm happy to share my operators' manual:

- **Service:** The noblest motive is the public good, so I am best served committing to fairness, equality, and creating systems that lead to opportunities for all.
- **Courage:** I demonstrate conviction for my values by taking risks and being bold.
- **Future Focused:** I continually anticipate, identify, and implement future trends and solutions as my way of contributing to a more vibrant society.

Simple, right? In the end, you don't need twenty core values to rally around. That many won't fit on a sticky note that you can affix to your laptop. And when you list that many values, it means you don't actually stand for anything.

In my mind, values are a much stronger driving force in yielding the outcomes and behaviors you may want to espouse daily. However, you do need some rules to govern your actions and pathways and guide your decision-making. That's why I developed fifteen of them to help you approach your work in the social sector through a lens of futurism.

## **THE FIFTEEN RULES OF PHILANTHROPIC FUTURISM**

**1. Understand that only government can change systems.** This is probably a surprising rule, let alone the fact that it's the first one listed. However, this was a sobering realization for me. For all of the funding, community standing, the ability to shape discourse, and the fact that many foundations will exist in perpetuity, the reality is that laws change systems and charity accounts for just over 2 percent of gross domestic product (GDP). So who is going to fund the revolution?

How does realizing this change your approach? Can it reframe your approach? Think of funding as a way to de-risk new community initiatives and provide government with both quantitative and qualitative data to invest more on proven programs. Think of community standing as a way to advocate for change and be a voice for those you seek to serve. Think of the ability to shape discourse as a reason to be a trusted convenor and strategic connector.

Also, think of perpetuity as somewhat of a civic Groundhog Day where you can ideate, tinker, and double down on solutions, knowing that mistakes can happen but that a strong evaluation framework can help you discover new ways to make a difference. The more philanthropy realizes its shortcomings in society, the more it can move away from picking up the tab for government cuts and begin leading new social innovation.

**2. Innovation doesn't have to be new—it just has to be new to you.** You don't have to reinvent the wheel. If an approach is shown to decrease chronic homelessness, look at why and then bring it back to your community, applying it in a way that makes sense and plugs in to current infrastructure. “Research, retool, and retrain” needs to be a nonprofit leader's new civic mantra.

**3. The robots aren't going to take your jobs.** Technology and automation are there to drive new efficiencies. Just remember that when routine tasks become obsolete in your workplace, and don't backfill that time with more mundane duties. Let that time be used for learning, exploration, and tackling new projects. Work under the assumption that tech will increase output and generate more jobs, not decrease them.

**4. Stay the course.** Change takes time; it certainly takes longer than a five-year strategic plan or that of a four-year presidential cycle. Set your goals and align expectations, contracts, and funding accordingly.

**5. Sometimes you need to think not outside the box, but from a different box altogether.** Radical innovation is substantially different from radical social change. Think about what tools or vehicles currently exist that might not be commonplace in nonprofits but could be gamechangers for your organization once applied. Don't adopt the old adage of “Why don't you run it like a

for-profit entity?” Instead, remember that a 501(c)(3) is just a tax designation, not a business model.

**6. What does that even mean?** Can you explain your ideas in a way a fifth-grader would understand? Does it pass the “so what” test? And for the love of all that is right in this world, please ditch the jargon, filler, and weasel words. Replace adjectives with data. Answer with yes, no, I don’t know, or a number instead of giving a vague answer that sounds meaningful. I added a glossary of terms at the end of this book to help with this.

**7. Don’t be everything to everyone.** The social sector is way too nice. Trying to get everyone to understand your way of thinking is actually doing you and those you serve a disservice. The only reassurance your work needs is a simple thank you. You could donate a million dollars and someone will say you didn’t give enough while another will say you gave it to the wrong organization. You can’t win, and that’s why you must lean on your values, make informed decisions, and trust your gut in doing what is right.

**8. Reclaim the word *philanthropy*.** Ditch the Latin meaning of philanthropy from your lexicon. It’s been used in the first paragraph of way too many blogs as a lazy on-ramp to promoting a GoFundMe campaign. The sad reality is that the word *philanthropy* does not elicit that powerful positive response it used to and is fast becoming seen as a construct of an evil capitalist society. Yes, it has flaws structurally. Yes, it has been used as a tool to decrease taxes and build unsavory individuals’ reputations. And yes, it has been widely used as a charitable transaction over that of a charitable act. But we need to realize this is our sector’s word, and we need to begin changing the stigma around it. Helping people understand that philanthropy *is* giving to your friend’s 5K fun run, that philanthropy *is* volunteering at your local food bank, and that philanthropy *is* sharing legal advice with a nonprofit pro bono. It’s time to not shy away from it and encourage others to lean into it as well.

**9. Convene, cultivate, and connect.** Bring folks together, tap into subject matter experts, and build coalitions around change. Impact investing and public-private partnerships should be the outcomes of engaging different sectors in discussion about the most critical issues of our time. A shared understanding that all these issues are intersectional will help drive more informed decisions at the

municipal, county, state, and federal levels. Oh, and be inclusive, not exclusive. We are all in this fight together.

**10. Don't just shove your logo on it.** Foundations have an uncanny ability to fund a project and take all the credit for it. They are quick to get out (and control the ensuing message) in that obligatory media release at the end of the funding cycle and use their large communications team to turn their results—whether planned or unplanned—into big marketing campaigns to yield even more donations. Instead of doing this, practice a new form of participatory place-based leadership. Know when to lead, when to stand side by side with community partners, and, most importantly, when to get the hell out of the way.

**11. We are not all in the same boat.** When I said that we are in a surreal moment of our time, I wasn't including the current civil rights protests. This is not a moment, it's the ongoing fight for racial justice, the ongoing movement against hate and prejudice that has been occurring over centuries. Philanthropic fragility is an issue right now. Many conversations are happening in the sector that focus on how to advance equity and equality in grantmaking. But are they leading to real changes to policy, staffing, and grantmaking practices? Or are they just fueling different content and speakers for their webinars? The call for action has been symbolized by all of us "being in the same boat," and that as allies we just keep rowing in the same direction. If we drop an oar, we pick it up and then keep rowing. I don't think we are in the same boat; I feel this saying, is another connotation of privilege. Instead, we are in the same storm, and there is still so much to be done before we even see land. Equity has to be front and center of the future direction of philanthropy. We all need to realize that when we make mistakes and our peers point out our flaws that we are not being called out, but are being called in.

**12. Credential so you don't crater.** I mentioned earlier that generalists are the best people to understand and conceptualize the future. They are also prone to become a jack/jill-of-all-trades and master of none, the career equivalent of being put in the friend zone. However, education is rapidly changing and, in what is no big surprise, is being rapidly disrupted mainly due to technology but also in part due to the effects of globalization and worker mobility.

I once met up with a fellow member of the San Diego Diplomacy Council who was adamant that I take my master's degree, stating that it was the passport to career success. Today, however, graduate studies are largely trending toward being simply a professional credential due to a range of capacity constraints, and getting these degrees from leading universities is more "paying into a professional network" than accelerating your career trajectory. So, getting your CFRE or a professional certificate in the social sector is beginning to support your career aspirations just as much as getting an advanced degree in nonprofit management or an MBA. And when it comes to futurism, you don't have to take formal training in computer science or engineering to understand machine learning or data analytics. Just hop on to LinkedIn learning and level up there in your own time.

Rounding out the fifteen are my three favorite fundamentals:

13. **Ask.** In other words, ask for more funding and support. Ask more questions about your approaches, goals, and vision. If you don't ask, you don't get.
14. **Give.** More specifically, give your time, talent, and money. Practice what you preach.
15. **Get shit done.** You can't talk outcomes into existence, and change isn't going to just happen by itself. The status quo loves talkers and procrastinators.

My favorite rule is number fifteen. I have built my reputation on it and am surprised no one has ever purchased me a novelty coffee mug with that slogan emblazoned upon it. If you can picture a Venn diagram with three circles—one that says "dream big," one that says "know how to have fun," and one that says "get shit done"—that intersection is the kind of people I want to work with and those I hope will get the most from reading this book.

When all is said and done, rules are fundamentally a failsafe for our values, norms, and—dare I say—morals. They are the balance of our lofty ideas and ideals, providing focus and a methodical approach to our work as change agents. So don't chase your purpose. Instead, chase a fulfilling life that complements what you care about, what excites



## *Future Philanthropy*

you, and what in your heart of hearts can make a positive difference to this world. After all, that's the only thing we can control: our actions in making this world a better place than we found it. Because right now, for the first time in a long while, our younger generations risk being left in a worse position than those that preceded them.