Philanthropy in Biography and Society  
History, Trends, Meaning, Motives, Spirituality, and Practice  
UIS Title: Philanthropy in Bio and Soc  
Professor Paul G. Schervish  
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x 24071

Spring 2010
  • ED744
  • MM844
  • SC703
  • SW744
  • TM 744

Graduate Course

Gasson Hall 305 Th 6 30-8 50
Thursday 6:30-8:50 p.m.

No books are required
Articles will be posted
on line to be downloaded

As of yet I have not completed the syllabus. But until I complete the syllabus, the attached material should give you a good sense of the interdisciplinary content of the course.

give you a good idea of the course.

Look for three documents that follow.

1. Course Descriptions
2. Narrative Outline of Topics
3. Partial Outline Presentation of Course Subject

Please feel free to be in touch by email or phone with any questions.
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Catalogue Description
This interdisciplinary course is designed for graduate students from across the university who wish to understand the personal meaning, and financial trends undergirding today’s philanthropy, especially among wealth holders; and who themselves may become donors or executives of nonprofit organizations. Philanthropy is one component of people’s moral biography by which individuals allocate wealth and other resources according to freely chosen purposes that they discern to be their vocation. Topics include: the history of philanthropy; its philosophical, spiritual, and sociological underpinnings; its patterns and trends in the U.S. and globally; its motivations; how research methodology affects findings; the daily personal assistance we provide to others; and how to conduct biographical conversations with donors.

General Description
This interdisciplinary course is designed for graduate students across the curriculum, for instance, any who envision working in nonprofit organizations and fundraising, have current responsibilities for nonprofit administration or development, expect to be donors in the future, and, in general, wish to understand the history, theory, personal meaning, and financial trends of U.S. philanthropy today. The course will cover topics ranging from research methodology to spiritual discernment. Emphasis will be placed on understanding both giving to charitable organizations and giving of time, goods, and money in the form of personal assistance. Students will learn the relation between research methodology and charitable statistics, how to conduct biographical interviews and personal counsel for guiding donors through a process of Ignatian discernment in regard to wealth allocation, especially for philanthropic purposes. Students will be able to work with a survey of 150 wealth holders with net worth greater than $25 million in order to learn the rationale, methods, and modes of analysis for research on philanthropy. In addition to learning about today’s philanthropists, students will also understand how they and others are already engaged in fundamental experiences of receiving and giving. Assignments include required reading, analytic papers, a personal philanthropic biography, and an interview research project.
Topical Outline

Moral Biography: Aristotle, Agency, and Hyperagency
A moral biography is the intersection of capacity and moral compass to close the gap between where one is and where one wants to be. The need to connect capacity and moral compass occurs in the areas of accumulation, consumption, disposition, and allocation. Although philanthropic giving is but one dimension of allocation that wealth holders discern in regard to their own and their children’s moral biography of wealth, it is becoming increasingly important to those for whom acquiring more wealth is no longer of high importance. Students will learn the meaning of a moral biography in general and of a moral biography of wealth as the deeper context within which philanthropic giving is one dimension.

Meaning: Philanthropy, A Relationship of Care Leading to Happiness
This section discusses the philosophical and sociological foundations of philanthropy as a relationship of care and friendship love in which meeting the needs of others can be directly achieved. It offers a definition of philanthropy that distinguishes it from commercial and political relations, and shows how it is properly understood as a mode of engagement, rather than the absence, of self. Students will see how caring for others is a natural and appealing aspect of a person’s life, and how this results in financial and volunteer activities that care for others. We will also review some recent research from socio-biology, brain studies, positive psychology and positive sociology in order to understand and evaluate what is being learned about the natural innate tendencies toward care of others as link to care for self.

Yesterday’s Donors: The History of Philanthropy
This module will provide a brief historical overview of philanthropy. It will first discuss different strategies of philanthropy. A strategy of philanthropy is a way of thinking, feeling and acting with the purpose of achieving a composite of goals and with a specific mode of engagement by a philanthropist. From within this framework, we will read about the various practices and people who have engaged in care of others from ancient times to the present. We will also examine the history of philanthropy within the theoretical framework of Keynes, who sees a potential causal relationship between growth in material wealth and the emergence of a code of morals that spawns greater care for one’s neighbor.

Today’s Donors: Defining the New Physics of Wealth and Philanthropy
I define the New Physics of Wealth and Philanthropy as the supply-side changes in the level of wealth, the meaning of care, and motives that are leading wealth holders to desire rather than resist greater levels of charitable giving, to be entrepreneurial in their approach, to limit the amount of inheritance they will pass to their heirs, to make philanthropy a crucial part of their financial morality, and to impart to their heirs a joint inheritance of material and moral wealth. We will also discuss the key spiritual, material, and psychological questions facing wealth holders as they transfer wealth to their children and to philanthropy.
Most Recent Trends: Who Gives What to Whom
This section will review the most recent data on current and historical trends in giving and receiving for the U.S. population at large, including reports from GivingUSA, the Foundation Center, and various other sources. Students will learn about the overall trends in philanthropy including a breakout of sources of gifts (individuals, bequests, corporations, and foundations) and a breakout of destinations of gifts by sector (e.g., education, health, social services, religion, etc.) They will also learn about the difference between formal charitable giving and personal assistance, and about findings on this difference from a diary study conducted by the Center on Wealth and Philanthropy at Boston College.

Money: The Relation of Growth in Wealth and Growth in Philanthropy
This module reviews the trends and current patterns of charitable giving by wealth holders. Wealth holders with net worth of $5 million or more constitute 1.4% of households and make 27% of all charitable contributions from individuals. The 8.3% of households with net worth of $1 million or more make 47% of contributions by individuals. Because so many of the charitable dollars come from this group the course takes a special look at what they give to. In this section we will also examine the unprecedented forthcoming transfer of wealth, and its implications for dramatic increases in lifetime giving and charitable bequests. We will study just why increased wealth inclines donors to increased charitable giving, and how wealth holders may be poised to give even larger amounts to charity than our projections may indicate.

Motivations and Happiness: Effectiveness and Significance
This module explores philanthropy as a biographical event, and reviews the set of personal motivations that mobilize philanthropy for all people and the specific motivations that tend to be particular to wealth holders. Our research shows that a commitment to philanthropy stems from how adequately we have been cared for in the past, our gratitude for blessings, how keenly we identify with the fate of others in the present, and a desire to produce outcomes that directly meet the needs of others. We will also review the controversial topic of how income tax and estate-tax regulations affect charitable giving.

New Methods of Philanthropic Fundraising: Instituting a Practice of Discernment and Discerned Decision-Making Through Biographical Conversations
This section will draw together what has been covered previously in an effort to indicate a practice of fundraising for development professionals and a spiritually fruitful approach for relating to all donors. Most importantly, I will draw out how the new trends and understandings allow financial and development professionals to approach donors' financial decision-making, especially in regard to philanthropy, as a guided biographical conversation putting in motion a process of conscientious discernment about capacity and moral compass. The purpose of such archeological conversations is to encourage a set of dispositions and practices that are more spiritually and religiously attuned. They are more emotionally engaging, and practically effective for wealth holders, and more vocationally rewarding for financial professionals and fundraisers.

Models of Solicitation: Inclination vs. Scolding
This discernment approach results in a practice that focuses on a model of inquiry and inclination rather than scolding and guilt. We will discuss the dispositions and techniques for conducting biographical conversations based on discovering inclination; and we will practice carrying out such conversations. We will study how this donor-centered discernment is carried out in an atmosphere of liberty and inspiration; and how it encourages wiser choices than are made in the face of the scolding model’s imposition of duty. In his Spiritual Exercises, Ignatius Loyola provides his version of the inclination model through his meditation on the three classes of souls. The will of God is to be found not in the hardest or most imposed thing to do, but in the most inspiring thing to do. In the end, this discernment method provides a way for fundraisers simultaneously to serve the needs of donors and the needs of the beneficiaries their organizations help. Reaching such a collaborative relationship that matches the needs of donors and the needs of beneficiaries is the path to greater effectiveness and significance for all involved, including fundraisers and charity officials.
I. Historical and Cultural Context

A. John Maynard Keynes

In his 1930 essay, “The Economic Possibilities for our Grandchildren,” John Maynard Keynes wrote about the growth in financial wealth and its implications for the growth in spiritual wealth. According to Keynes,

“The economic problem [of scarcity] may be solved, or at least within sight of solution, within a hundred years. This means that the economic problem is not—if we look into the future—the permanent problem of the human race [italics in the original] (1930 [1933], p. 366). “I look forward,” he continues “to the greatest change which has ever occurred in the material environment of life for human beings in the aggregate... Indeed, it has already begun. The course of affairs will simply be that there will be ever larger and larger classes and groups of people from whom problems of economic necessity have been practically removed” (p. 372).

“When the accumulation of wealth is no longer of high social importance, there will be great changes in the code of morals. We shall be able to rid ourselves of the many pseudo-moral principles, ... by which we have exalted some of the most distasteful of human qualities into the position of the highest virtues” (p. 369).

Although Keynes argues that a change in material environment will spawn a sea change in spiritual consciousness, he does not condemn as lacking moral compass those who continue to focus on generating wealth. For “the time for all this is not yet” (p. 372). Still he does insist that great wealth offers opportunities for a broader and deeper horizon of aspirations and responsibilities.

It is Keynes’s aspiration that “The love of money as a possession—as distinguished from the love of money as a means to the enjoyments and realities of life—will be recognized for what it is, a somewhat disgusting morbidity, one of those semi-criminal, semi-pathological propensities which one hands over with a shudder to the specialists in mental disease” (p. 369).

When individuals reach a level of subjectively defined financial security, there is the potential for a shift in moral compass whereby the accumulation of wealth ceases to be an end and becomes more fully a means to achieve other ends. Such ends may be retirement, providing an inheritance, pursuing a hobby, or enjoying more leisure.
The consequence of lifting economic necessity, will be that “for the first
time since his creation man will be faced with his real, his permanent
problem—how to use his freedom from pressing economic cares, how
to occupy the leisure, which science and compound interest will have
won for him, to live wisely and agreeably and well” (p. 367).

But Keynes suggests an additional prospect, namely, a change in “the
nature of one’s duty to one’s neighbour. For it will remain reasonable
to be economically purposive for others after it has ceased to be
reasonable for oneself” (372). The shift of wealth from an end to a
means, then, is arguably the most significant transformation of capacity
and character for individuals who have solved or are near to solving the
economic problem.

B. Moral Biography of Wealth: the intersection of capacity and moral compass
   - Gospel of Wealth as combination of empowerment and responsibility
   - The hero of one’s own life
   - The protagonist offered as a model of emulation
   - Hyperagency:
     - principality (spatial and temporal empowerment);
     - individuality (psychological empowerment)
   - The coincidence of advantage and merit as defining virtue and vice in Western
culture.
   - Happiness: the goal of life
   - Effectiveness and significance
   - Achieved by closing the gap between history and aspiration
   - Achieved by making wise choices—exercise of virtue (phronesis)
   - Condition for wise choices: liberty and inspiration

II. Demand and Supply in Philanthropy
   A. Key Question: How to increase the output of charitable giving

   B. Demand Side: Output is increased by enunciating need more effectively
      1. Emphasizes the role of intermediaries to
      2. Convince donors of need for their gifts
      3. Instill in donors a moral obligation to shift more expenditures to gifts
      4. Set appropriate standards for how much to give, what to give it for, when to do so, and
         through which vehicles

   C. Supply Side: Output in increased by changes in the lives of wealth holders
      1. Emphasizes changing circumstances of donors rather than the demand of needs
      2. Charitable giving will increase over the next decades in excess of what we have
         estimated
      3. Changes in preferences for allocations of wealth among taxes, heirs and charity
      4. Increased wealth has the potential to make wealth holders more charitably inclined
      5. Increasing material resources and spiritual motivations
Moral Biography

Genesis
History
• Current status
• Where one is
• Partial happiness

Agency
Moral Biography
• Means to attain one’s goal
• Wise choices
• Discerned decisions

Telesis
Aspirations
• Ultimate end of life
• Where one wants to be
• Greater happiness

Capacity
Empowerment
• Choices
• Freedom
• Effectiveness
• Vigor (energy)
• Capital
• Material wherewithal

Moral Compass
Character
• Wisdom
• Purpose
• Significance
• Cura (care)
• Value
• Spiritual wherewithal
III. The New Physics of Philanthropy

A. Financial and social-psychological forces shaping charitable giving by wealth holders, and which make philanthropy a more explicitly a *collaborative* relation between donors and recipients.

B. An innovative way of thinking, feeling, and acting in regard to philanthropy, with implications for how we approach philanthropy from both the demand and supply sides.

C. In the new physics, wealth holders are viewed as collaborative agents who:
   1. Are becoming more numerous, have higher net worth at a younger age, and increasingly recognize their financial security;
   2. Seek out rather than resist greater charitable involvement;
   3. Approach their philanthropy with an entrepreneurial disposition;
   4. View a charitable organization as an instrument for implementing their care instead of just viewing themselves as instruments for the charities to do good;
   5. Have as the objective of giving to a variety of causes as leading to development of human capital and intellectual capital
   6. Focus increasingly on global causes
   7. Understand and seek out collaborative efforts and other ways to leverage their philanthropy
   8. Move their giving toward inter-vivos contributions;
   9. Plan to limit the amount of inheritance for heirs;
   10. Understand that caring for the needs of others is a path to self-fulfillment;
   11. Make philanthropy a key and regular ingredient of the financial morality they observe and impart to their children;
   12. View philanthropy as a way to achieve simultaneously the happiness of themselves and others; and
   13. Consider business activities, assistance of family and friends, and production of socially useful products and philanthropy in root sense of meeting true needs and mutual nourishment.

IV. Two Terrains of Questions

A. The Scolding Model—the demand side expressed with a demanding attitude (cajoling, guilt based, admonishing, extracting, dental—drill, fill, and bill
   You are not giving the right amount,
   At the right time,
   To the right causes,
   In the right ways.

B. The Inclination Model
   Is there anything you want to do?
   That is important to do as an act of care for others?
   That you can do better through philanthropy than through government or commerce?
And that enables you to identify with the fate of others, express gratitude for blessings, and achieve deeper personal happiness—i.e., effectiveness and significance—for yourself and others at the same time?

V. The Meaning of Philanthropy as Care and *Philia*

A. Philanthropy as a Social Relation of Care or Strategic Friendship

Les Miserables, Jules Toner, Aristotle (philia) Aquinas

John 15:15 (New International Version)
I no longer call you servants, because a servant does not know his master's business. Instead, I have called you friends.

(φίλους, philous, friends)

John 21:17
The third time he said to him, "Simon son of John, do you love me?"
Peter was hurt because Jesus asked him the third time, "Do you love me?" He said, "Lord, you know all things; you know that I love you." Jesus said, "Feed my sheep."

B. Commerce and politics as responding to effective demand

C. Care as responding to affective demand—entreaty

D. Philanthropy one social relation of *caritas*—attending to others in their true needs; one social relation of care where needs are attended to on the basis of the person in need

E. Business and Politics as Philia

What are ordinarily called benefactions—that is, gifts for beneficial uses—are, therefore, by no means the only benefits very rich men can confer on the community to which they belong. Any man who, by sound thinking and hard work, develops and carries on a productive industry, and by his good judgment makes that industry both profitable and stable, confers an immense benefit on society. This is indeed the best outcome of great riches.


F. Infinite Needs, Low Barriers to Entry, Philanthropy as Supply Led, Character and Insight of Donor

Experience seems to show that is difficult for a very rich man to give away intelligently and with enjoyment as large a proportion of his income as a man in modern circumstances can easily give away. . . . It is no easy task to select wisely object for great benefactions and to give money to the
selected objects without doing injury. . . . It is easy to pauperize the individuals helped. It is easy to destroy their self-reliance and their capacity for productive labor.  
CWE p. 22

G. Charity begins at home—the concentric circles of care, the moral citizenship of care  
(Table 1)  
— consumption philanthropy  
— adoption philanthropy  
— munus suavissimum—that most gentle burden

<table>
<thead>
<tr>
<th>Category of Organization or Person</th>
<th>Participation Rate</th>
<th>Average Annual Contribution</th>
<th>Contributions as Percentage of Income</th>
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<tbody>
<tr>
<td>All Organizations</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Religious</td>
<td>100%</td>
<td>$1,759</td>
<td>2.20%</td>
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<tr>
<td>Non-Religious</td>
<td>75%</td>
<td>$875</td>
<td>1.30%</td>
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<tr>
<td>Non-Religious</td>
<td>95%</td>
<td>$885</td>
<td>0.90%</td>
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<tr>
<td>All Interpersonal</td>
<td>98%</td>
<td>$9,183</td>
<td>7.40%</td>
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<tr>
<td>Relatives</td>
<td>93%</td>
<td>$8,372</td>
<td>6.10%</td>
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<tr>
<td>Adult Child/Grandchild</td>
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<td>$5,706</td>
<td>3.80%</td>
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<tr>
<td>Parent</td>
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<td>$347</td>
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<tr>
<td>Other Relative</td>
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<td>$2,318</td>
<td>1.60%</td>
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<tr>
<td>Non-Relatives</td>
<td>98%</td>
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<td>1.30%</td>
</tr>
<tr>
<td>Total Money and Goods</td>
<td>100%</td>
<td>$10,942</td>
<td>9.60%</td>
</tr>
</tbody>
</table>

Source: Social Welfare Research Institute, Boston College

H. Engagement vs. Altruism  
The quality of the self not the absence of self: “It is not self, but the excess of self that is [to be] suppressed. . . . To love is to abandon this self instinctively locked in isolation, in order to rediscover the genuine ontological self, which is necessarily the center of a whole network of relations.” (G. Gilleman)

I. All Giving as Planned or Biographical Giving

VI. The Motives
A. Financial Security:  
financial security and the quality of needs (Table 2)  
Thomas B. Murphy, an actuary, business owner, and wealth holder, has sought to conceptualize the usually implicit combination of financial and psychological reckoning that he and other wealth holders go through, formally or informally, in determining how much of their resources to
donate to charity. He describes a process in which wealth holders determine a stream of resources; a stream of expenditures for self, family, and investment; and a stream of truly discretionary resources that is simply the positive difference (if any) between the stream of resources and the stream of expenditures:

Given the generally accepted assumption that one provides first for oneself and one’s family and does so at some level of lifestyle, philanthropy enters into the decision-making process [in a more formidable manner] when the difference between the expected level of income, current and future, and expected level of expense, current and future, to maintain and enhance one’s standard of living is substantial and relatively permanent as measured by the subjectively determined criteria of the decision maker. . . . The extent to which this difference (discretionary income) between income and expense is positive quantifies the financial resources available for philanthropic activities. The extent to which this difference is perceived as permanent strengthens the case for allocating some of the resources for philanthropy. The extent to which the difference is positive, permanent and growing in magnitude enhances the philanthropic allocation. (pp. 34-35)

B. Happiness:
  closing the gap between history and aspiration

C. Wise choices:
  application of sensitized intelligence, liberty, and inspiration;
  virtue: the habit of doing good

D. Identification:
  empathetic connection to the destiny of others

E. Giving back:
  gratitude animated by blessing

F. Hyperagency:
  productive capacity in life and philanthropy

G. Spiritual secret of wealth:
  recognition of fortune and empathy for misfortune

H. Aspiration to meet needs directly
  “ideal” of doing something “unambiguously social.”

David Hendricks:

I’ve always kind of rolled my eyes a little bit when I hear about do-gooders because I have this image in my mind—not grounded at all on any experience—they will be lightweight type of stuff, full of petty politics. So I’ve always steered away from the world of philanthropy or non-profit and pooh-poohed it somewhat. But there is a side of me that says that maybe I can tune in a little bit more and do something that is unambiguously socially positive and see how that feels. I would like to

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see how that feels and if I find myself getting up in the morning very excited about how I am spending my time, if indeed I do find something that is unambiguously socially positive. This is something that struck me really very profoundly: those simple pleasures of being a contributor and being able to map how those contributions fit into the larger scheme of things. Kind of the social welfare, if you will. (Respondent in 2001 High-Tech Donors Study, http://www.bc.edu/swri).

I. Liminality and final death: the recurring transformation of life
J. Human capital development: the distribution of productive capacity
K. Satisfaction: the path to sustained care

VII. The Practice of Financial Ministry: Biographical Conversations of Discernment to Link Supply of Service to Demand of Needs

A. The Meaning of Ministry
   1. Connecting heaven and earth, wise as serpents gentle/harmless as doves
   2. City of God and City of Man
   3. Moral Biography of Capacity and Care
   4. Competence and Compassion

B. The Need for This Ministry: The Soup of the Soup
   1. New knowledge for our epoch—to ease the fog that comes over people when the question turns from accumulation to allocation
   2. Productive understanding of wealth
   3. Discovery of new spirituality and new religiosity (defined)
   4. A key question for the 21st Century: How to use wealth as a tool for deeper purposes when acquiring more wealth or a higher standard of living is no longer of high importance.

VIII. The Methods: Discernment

The First Principle and Foundation (Spiritual Exercises)

Human beings are created to praise, reverence and serve God Our Lord and by this means to save their souls. The other things on the face of the earth are created for human beings to help them in working toward the goal for which they are created. Therefore, I am to make use of these other things insofar as they help me attain the goal and turn away from these other things insofar as they hinder me from attaining the goal. I must make myself indifferent to all created things, as far as I am allowed free choice and am not under any prohibition. Consequently, as far as I am concerned, I should not prefer health to sickness, riches to poverty, honor to dishonor, a long life to a short life.
The same holds for all other things. My one desire and choice should be what is more conducive to reaching the goal for which I am created.

A. Disposition of discovery rather than command—counseling wise choices

B. Archeology before Architecture: decisions about strategic design: self, family, others

C. Artifact: implementation of decisions

D. *Discernment* in the Ignatian tradition is a conscientious process of intellectual and emotional self-reflection by which individuals review experiences and capacities, clarify responsibilities, and implement decisions

E. Addresses need of wealth holders for an inviting and effective approach to decide freely how much and in what way to conscientiously allocate their financial resources, in general, and to charity, in particular
   - Clarification of general financial capacity and charitable resources;
   - Clarification of broader moral purposes and charitable aspirations; and
   - Clarification of how to forge charitable resources and charitable aspirations into specific philanthropic practices.

F. The key ingredient missing from current efforts aimed at expanding philanthropy among wealth holders.
   - Allows duty to be self-discovered in an environment of liberty and inspiration, and hence to be more wholeheartedly pursued and sustained.
     - Liberty is the material and psychological freedom from unfounded assumptions, fears, and anxieties;
     - Inspiration is the array of desires and aspirations that motivate a commitment.

G. Can be an informal process carried out by a self-reflective individual or a more formal process guided by an advisor or counselor.

H. All Giving is Planned Giving—Donor as unit of analysis
IX. The Three Classes of Souls

Three Classes of Persons. The meditation begins with a sketch of the scene. We learn, according to the translation by George E. Ganss, S.J., that each of three persons

“has acquired ten thousand ducats, but not purely or properly for the love of God. Each desires to save his or her soul and to find God in peace . . . by discarding the burden and obstacle to this purpose which this attachment to the acquired money is found to be.”

Retreatants are then instructed to “ask for the grace to choose that which is more to the glory of the Divine Majesty and the salvation of his or her soul.” The points of the meditation ensue:

The Person Typical of the First Class would like to get rid of this attachment to the acquired money, in order to find God in peace and be able to attain salvation. But this person does not take the means, even to the hour of death.

The Person Typical of the Second Class also desires to get rid of the attachment, but in such a way that she or he will keep the acquired money; and that thus God will come to where this person desires. No decision is made to dispose of the money in order to go to where God is, even though that would be the better state for this individual.

The Person Typical of the Third Class desires to get rid of the attachment, but in such a way that there remains no inclination either to keep the acquired money or to dispose of it. Instead such a one desires to keep it or reject it solely according to what God our Lord will move one’s will to choose, and also according to what the person himself or herself will judge to be better for the service and praise of the Divine Majesty.

In the meantime this person endeavors to take an attitude by which as far as the affections are concerned, he or she is giving up everything. [In other words (Ganss)], one strives earnestly not to desire that money or anything else, except when one is motivated solely by the service of God our Lord; in such a way that the desire to be able to serve God our Lord better is what moves one to take or reject any object whatsoever.
X. Biographical Conversation

A key question of the 21st century is how to use wealth as a tool for deeper purposes when acquiring more wealth or a higher standard of living is no longer of high importance.

TO FATHERS BROËT AND SALMERÓN, FROM IGNATIUS LOYOLA
September 1541

How to Deal and Converse with others in the Lord

(Excerpt)
Whenever we wish to win someone over and engage him in the greater service of God our Lord, we should use the same strategy for good that the enemy employs to draw a good soul to evil. The enemy enters through the other's door and comes out his own. He enters with the other, not by opposing his ways but by praising them. He acts familiarly with the soul, suggesting good and holy thoughts that bring peace to the good soul. Then, little by little, he tries to come out his own door, always portraying some error or illusion under the appearance of something good, but which will always be evil. So, we may lead others to good by praying or agreeing with them on a certain good point, leaving aside whatever else may be wrong. Thus after gaining his confidence, we shall meet with better success. In this sense we enter his door with him, but we come out our own.

A Simple Focused Conversation about a Person’s Moral Biography—Past, Present, and Future

A biographical interview, or archeological conversation, is simply a focused conversation led by the counselor and aimed at granting the potential donors an opportunity to clarify just what in their background, current feelings, and future aspirations brings them to consider a gift to the charity.

Goal of the Conversation
To obtain over time as many details as are relevant for you and your donors’ understanding of their past, present, and future in the use of their capacities for particular purposes
Content of the Conversation
- Story of Life
- Moral Biography—connection of capacity and purpose
- Past, Present, Future
- History and Aspiration
- Goal: Discovering nature of and closing gap between where donor is and where donor wants to be in regard to concentric circles: self, spouse, family, friends, associates, people in need
- What happened to the donor and what donor did about it.
- Thinking, Feeling, Acting
- Concentric circles of the other moral biographies (family, friends, teachers, books, religion, experiences, spouse, children, fellow workers, etc.) that shaped donor and donor helped shape
- Key people, key events

1st Summary: Biographical Conversation asks about your donors’ prayers, works, joys, and sufferings—what they have been, how they changed, what they are today, and what they want them to be in the future
- For self, family, and others in the world

2nd Summary: Biographical Conversation asks about your donors’ joys and hopes, hurts and anxieties—what they have been, how they changed, what they are today, and what they want them to be in the future
- For self, family, and others in the world

3rd Summary: Schematic Overview of Interview
1. What were the relevant experiences and turning points in the past when growing up and as an adult? How did these create heartfelt sufferings and blessings?
2. What currently are the relevant experiences and turning points in the present? How do these create heartfelt concerns and opportunities for self and others simultaneously?
3. What are the relevant experiences and turning points one aspires to create in the future that will better life for themselves, the charity, and its beneficiaries at the same time?

Dispositions
1. Discernment: do what is needed to help donor do what is needed
2. Discovery and self discovery
3. Ethics of archeologist
4. Aude sapere, aude sentire—be not afraid
5. Involving donor in something good; offering care and service
6. Neither adulate nor attack
7. Engaged indifference
8. Really want to know / intelligence officer / witness
9. Gratitude
10. Offer environment of liberty and inspiration
11. Goal of wisdom: do what is needed to help donor do what is needed
Techniques
1. Extended conversation
2. Starting point—genetic biography
3. Horizontal line of questions, vertical line of questions
4. Follow the emotion
5. “How” rather than “why”
6. Follow up questions, TMM (tell me more)
7. Inquire about dilemmas and other complex and contradictory experiences, strategies by which they handle them
8. Test understandings—gentle hypotheses to learn whether your insights are correct
9. Ask about gaps and special transitions
10. Share when helpful but resist interrupting too much with your own story

Peer Interviews
Conducting an interview with a colleague followed by reflection

1. Person A interviews Person B about growing up and adult past with a special focus on clarifying:
   Aspects of Person B’s moral biography of happiness (effectiveness and significance) when growing up and in adult past —how it was shaped, key blessings and obstacles, key turning points, and any implications for connection to charity

2. Person B interviews Person A about the present and future with special focus on clarifying:
   Aspects of Person A’s aspirations and obstacles about going forward with financial and other capacities to help deepen the moral biography of happiness (effectiveness and significance) of self and spouse, heirs, and others, and implications for connection to charity

Reflection
- What A and B learned about interviewing from point of view of interviewer seeking a donation—what clarity arose about how to interview for a gift
- What A and B learned from point of view of being interviewed as a potential donor—what clarity about giving a gift
Interpreting the Interviews

Insights to be garnered by you and donor:
- Factual, descriptive
- Explanatory
- Relational
- Thematic
- Practical

Practical Implications

Implications for fundraising from using this type of clarifying conversations
- For whom
- When
- For care for donors’ true needs
- Collaborative philanthropy—the sweet spot of philia

Conclusion: The Vocational Horizon
- Closing the gap between history and aspirations for self, family, community, world
- A practical vocation of wise choices
- the ultimate end of happiness
- the daily purpose of philia
- the new vocation of fundraising