



Newsletter

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Reflections on The Whitman Institute 2009 Retreat

By John Esterle, Executive Director

On March 6-8, The Whitman Institute hosted its second gathering for our grantees, board, and staff at The Marconi Center in Tomales Bay. Our aim was for a restorative weekend: a time for grantees to unwind, rest, and reflect on their work and their lives. We hoped, too, that grantees would form new connections, deepen existing relationships, and perhaps discover opportunities to support one another as colleagues. An added benefit was the chance for our trustees to interact with our grantees in person, rather than just read about them. By the end of the weekend, we wanted everyone to leave feeling refreshed, re-energized, and excited by a least a few new ideas and perspectives they encountered.

I am happy to report that our hopes were fully realized. The beautiful setting and gorgeous weather certainly helped, but it was the people, of course, that made the event truly memorable. Some of the 30 participants knew each other through their work or had met at our first retreat in the fall of 2007, while some newcomers came knowing only me. Regardless of one's history with TWI, however, right from the start there was a palpable feeling of openness and curiosity – qualities certainly conducive to shared inquiry and reflection!

This year we were more attentive to the rhythm and pace of the weekend than at the previous retreat. We also paid attention to feedback that grantees wanted more opportunities to hear about each other's work. The sessions, facilitated by staff and by grantees, alternated between large and small groups. All were interactive, and all included grantees, board, and staff. We also built in plenty of time for participants to "just be."

Since many of our grantees use different models of dialogue in a range of settings and contexts, the retreat is an opportune time for us to draw on their expertise in designing the sessions. Consequently, David Issacs, co-founder of The World Café, led a series of conversations that built off the question of what people are currently excited about in their work. Mark Gerzon, founder of Mediators Foundation, got everyone thinking about the challenges of designing optimal environments for collaborative problem solving and decision making. On Saturday night, Ellen Schneider, founder of Active Voice, screened a rough cut of a documentary whose provocative subject generated discussion and debate that carried over to the breakfast table the following morning. In fact, it was during the "down times" – the informal conversations over meals, the walks on the Center's grounds, the visit to the local oyster bar where some of us shared heaping platters of oysters and French fries an hour before dinner—that, from all reports, some of the most important learning happened and the closest connections developed.

Sitting in the closing circle on Sunday at noon listening to the buzz of conversations and laughter, looking at the relaxed faces, and feeling the warmth that had characterized the retreat from the start, I felt moved by what had transpired over the weekend. Grantees, board, and staff had come together as equals and without regard to titles to create a relaxed environment that inspired intelligent discussion, trust, support, and reflection. Participants talked about what made the weekend so enjoyable: the camaraderie, the gift of rich conversations, and the pleasure of hanging out with "fantastic people doing amazing things in the world." One even compared the retreat to going to summer camp, only with better food and more stimulating companions. Another, not knowing what to expect when he arrived, admitted that he had left thinking about new directions in which he might take his organization. "This retreat was unlike any I've attended," he said. "It was disorienting, but in a good way."

The success of this year's retreat reconfirmed my belief in the value of having grantees, board, and staff spend a few days together. But, like all foundations, The Whitman Institute's endowment has taken a big hit over the past 18 months. Could we justify the expense of holding another retreat next year if the stock market doesn't turn around? Is a retreat an unaffordable luxury in a time of severe crisis and uncertainty? These are questions we've asked ourselves and that I hope other funders are contemplating too. At TWI, we will continue holding grantee retreats if not annually, at least every 18 months.

As an executive director of a grantmaking foundation, I've learned that awarding grants is just one way to support grantees. Convening meetings is another. An occupational hazard in the nonprofit sector is isolation; many grantees lack the time and resources to meet with colleagues, even in good times. I would argue, then, that these gatherings are more essential during a time of economic crisis and great uncertainty. What better time to bring people together to help and support one another?

TWI is committed to fostering the principles of open dialogue and deliberation at all levels of society and in a wide variety of contexts. In the coming year, we will continue to explore opportunities to convene (or co-convene) meetings among grantees, among grantors, and between grantees and grantors – and across organizations, sectors, and fields. We hope other funders will join us as we think the time is ripe for foundations of all sizes to take a more prominent role as conveners and connectors to promote social innovation and change. We invite other funders to join us.

Four Approaches to Leadership Transitions

The topic of leadership transition kept popping up at the 2007 TWI retreat. Grantees talked about changes in their organizations, their fields, and in themselves that led to an unavoidable conclusion: something had to give. Either it was time to transfer leadership to a new person or redefine the leader’s job. Relinquishing authority, however, can be a difficult and emotional process—even when it’s voluntary. But it’s especially true for founders who have invested so much of themselves in their organizations.

Over the past 18 months, four of our grantees underwent changes in leadership. The 2009 retreat provided a forum for them to tell their stories. We believe their experiences contain lessons for other nonprofit organizations planning a leadership transition and for those that have yet to start thinking about it.

Rachael Kessler founded the **PassageWorks Institute** in 2001 to partner with educational institutions in nurturing the inner lives of students and teachers. Over the past 20 years, she and colleagues around the country have developed a model and associated curricula that support students’ emotional and social learning through the six major passages from kindergarten through high school. Today, a growing number of elementary and secondary schools are using the PassageWorks approach to help young people make a deep connection to self, others and community.

A few years ago Rachael and the board recognized that to grow the organization to the next level, PassageWorks would have to broaden its base of leadership. They hired an associate director in 2007, but it soon became apparent that the person didn’t have the right chemistry and the position wasn’t what the organization needed. “I was so ready to let go of the leadership,” says Rachael, “that I may have let go of too much too quickly.” Reassessing their needs, Rachael and the board began a search for an executive director, hiring Mark Wilding in January 2008. “I was delighted to find in Mark a true partner who could bring his leadership experience to PassageWorks at a pivotal moment,” says Rachael.

“Mark shared PassageWork’s deep commitment to transformative education.” The organization also promoted Laura Weaver to association program director, Liz Amore to operations manager, and expanded its cadre of adjunct faculty.

Six months after Mark joined PassageWorks Rachael was diagnosed with a life-threatening illness, requiring her to alternate between periodic medical leaves and work. Faced with the unexpected, Mark and Laura took on additional leadership responsibilities. Accelerating the transition plan put particular pressure on Mark, the newest member of the team. “I tried to immerse myself in every aspect of the organization at once,” he says. “I felt as if I had jumped on a moving train.”

Now, a year later, Rachel and Mark have settled into their new roles. Rachael, the president, concentrates on the big picture, and Mark, the director, runs the Institute. “The transition is a process we had to go through individually and together,” says Rachel, “learning to let go in some areas and to partner in others.” A highlight for both was Rachael’s choice of passing on the history of the organization to Mark through stories. “What makes stories so powerful is that they deliver feelings and values along with the facts,” he says. “The stories turned into conversations and a process for building our relationship.” Two sayings that capture truths about transition for them: “Chance favors the prepared mind,” and “Clarity invites magic in.”

LeaderSpring is a leadership development and community-building program for executive directors of nonprofit organizations in the San Francisco Bay Area. Cynthia Chavez, the executive director, was originally hired as a consultant to Eureka Communities, which developed the model. In 2003, LeaderSpring became independent and Cynthia its director. While not technically the founder, she has been the recognizable face of the organization for the past 10 years.

LeaderSpring's Fellowship Program is a complex and labor-intensive operation to run, and Cynthia has received valuable assistance from Karen Anselmo, LeaderSpring’s director of operations and special projects. As Cynthia's workload intensified, however, she recognized that her job was too big for one person. Their search to find the right person for the program director position took more than a year, yet was well worth the wait. Dr. Renato Almanzor, who has a Ph.D. in organizational psychology, brings to LeaderSpring extensive expertise in organizational development and leadership research and theory.

Integrating a high-level person into the small LeaderSpring team required more careful planning than Cynthia’s workload allowed. Due to the timing of his arrival, Renato had to hit the ground running. Because she and Karen were accustomed to working as a team, they underestimated how much orientation was needed to teach successful LeaderSpring practices as a baseline of knowledge. One practice they found helpful, at Renato’s suggestion, was applying a model of on-the-job training known as “I do, we do, you do.”

"While this transition marks the end of my role managing the fellowship program, which I found so rewarding," says Cynthia, "it enables me to give greater direction to the organization as a whole and to achieve a more manageable workload. The transition hasn't been easy, but it's been fruitful - and good practice for sharing leadership while enabling me and my team to discover new and ever more potent ways to lead.

Elana Yonah Rosen founded **Just Think**, a Bay Area media literacy education organization in 1995. Its mission was to teach young people to think critically about the media and to give them tools to produce their own digital films. After running the organization for more than 10 years, Elana began reassessing Just Think's progress in carrying out its mission. While it had penetrated deeply into a few communities, it hadn't reached the scale she had envisioned. "I didn't have the business and administrative skills to take it to the next level," she says. "My interest was in creating a social enterprise and doing strategic planning, not high-level administration."

Coincidentally, Rey Ramsey -- chairman and CEO of One Economy Corporation, a global organization based in Washington, DC that brings technology and information to low-income communities -- was transforming his organization into a media company. "When we met," says Elana, "we realized that we had the same goals and worked with the same populations." Their organizations also had complementary strengths. One Economy had the business acumen and wide network of wired individuals that Just Think lacked, and Just Think had the curriculum for teaching critical thinking skills and media production that One Economy needed. The two leaders agreed their organizations were a perfect match for a merger.

But first, One Economy's board wanted Elana to answer three questions: Do you have to run the show? Does the organization have to be called Just Think? Is it all about the mission? "The first two questions were about ego, a hurdle for most founders," she says, "but I had already embraced the idea of transition personally and professionally. The third was easy; for me, it is all about the mission."

In November 2008, the two organizations officially merged. Elana willingly gave up Just Think's name and her title as executive director, but what wasn't negotiable was leaving her staff behind. "I don't do this work alone," she says. "They had to come with me." Today, as senior advisor to Rey, Elana assists with strategic planning, international media and program development, and fundraising. The merger is proceeding with the occasional bump or two but, says Elana, she's optimistic about its prospects. "I was ready for the change, and I trust Rey."

Dave Smith started **Mobilize.org** in 2004 to develop a new generation of educated and energized young people prepared to take on leadership roles in their communities and in state and national politics. Through its conferences and Web site, Mobilize.org informs youth between the ages of 12 and 30 about public policies affecting their lives and how they, in turn, can have an impact on those policies.

Young people need real opportunities to lead, and Dave designed Mobilize.org to be a model for leadership development. As such, the CEO position is viewed as a training ground for leaders that will be vacated after several years for the next leader to step into—assuming, that is, that the designated successor has performed well and been approved by the board. The rationale is to build a strong organization independent of a charismatic leader.

Dave served as CEO for six years and, like it or not, his emergence on the political scene while a student at UC Berkeley earned him “rock star status.” That proved a challenge for Maya Enista, who trained to succeed him for three years. “For the first two years, I felt unrecognized,” says Maya. “It’s hard to follow a rock star.”

Now, after one year as Mobilize.org’s CEO, Maya has built a large and strong network and established her own credentials as a leader. And she has already begun grooming her successor, Ian Storrar. “Handing over leadership is easier to do when you’re not the founder of the organization,” she says. Meanwhile, Ian, who started working at Mobilize.org last year, is still learning the lay of the land. “It’s too early for me to think about the transition,” he says. “I’m still getting to know the organization and seeing who’s connected to what. Besides, my transition may not happen in the same way Maya’s did.” She agrees. “Ian has an advantage I didn’t have. I’m not as cooked a leader as Dave was, so Ian will see me struggle more—and that’s good.”

Commonweal Casts a Wider Net

By Edd Conboy

If you decide to matriculate (virtually, that is) at The New School @ Commonweal, a TWI grantee, I suggest you make room on your bookshelf. You’ll need it because after listening to some of Commonweal’s netcasts, hosted by Michael Lerner,* founder of The New School, you’ll want to read more about the provocative intellectual and emotional topics discussed. From pre-Socratic philosophy, to the interplay of religion and cosmology, to death and aging, consciousness and healing, and social networking, these netcasts deliver on the promises of a worldwide Web that, until now, have only been honored sporadically, at best.

Michael describes himself as a freelance spiritual intellectual, and rightly so. Yet this description doesn’t capture what he and his colleagues at Commonweal bring to the on-line community. Freelance yes, in that the folks at Commonweal are beholden to no one when it comes to exploring the dimensions of ecology, cosmology, health and healing, and other topics that at one point in our history were good to know, and now have become essential learnings.

Intellectual is an apt descriptor for Michael, but limiting. He could have devoted his considerable talents to academia. Instead he chose another path – a life of mind combined with a life of action. He conceived of Commonweal as a “think and do tank” in which practice is paramount. He sees “practice” as a life-long commitment to engaged reflection-- a practice in which the arts are fundamental to Commonweal’s wider decades-long conversation about healing and ecology, and consciousness and compassion.

These netcasts are an important facet of this practice. In the two and a half years since its inception, the New School has hosted more than sixty events including fifty of these dialogues with thought leaders across geographical, cultural and professional boundaries. Michael’s conversational interviewing style gives the on-line audience the feeling that we are listening in on spontaneous dialogues full of surprises and delightful subtleties. Paradoxically, Michael creates this feeling by rigorously preparing before each netcast. He not only grasps the major arcs of his guests’ life work, but also the nuances and small details that allow for deep conversation within a brief timeframe.

A few highlights: Since I began working my way through the New School’s audio archives, I’ve listened to a conversation between Rachel Kessler, founder of PassageWorks Institute, a TWI grantee, and Commonweal’s Rachel Naomi Remen about “nurturing the inner life of education” – a conversation that demonstrates how vital emotional literacy is for educators and healers alike. One advantage to recording these “thought leaders,” as Michael calls them, is the chance to “rewind” the interview to catch deeper meanings than on the first pass. Like me, you’ll probably find yourself listening to many of these conversations more than once to digest it all.

Where to find the New School @ Commonweal netcasts:

Go to <http://www.commonweal.org/new-school/events.html> and click on the iTunes bar. This link will take you to the “New School at Commonweal” page. To stay up-to-date with netcasts, subscribe to the New School on iTunes. New netcasts will be delivered to your desktop when you click on the “refresh” button at the bottom of the iTunes page. If you subscribe to the netcast, consider adding a few comments in the customer review section. iTunes tracks both the number of reviews and the ratings for each netcast. Not many people bother to add reviews, so here’s an opportunity for a small number of folks to have a significant impact on Commonweal’s on-line visibility.

Other noteworthy interviews include TWI’s grantee Mark Gerzon’s dialogue about consciousness and decision-making, and a fascinating conversation with Ram Dass about aging and illness and, specifically, what his stroke has taught him. Quaker educator, Parker Palmer, speaks eloquently about the “politics of the brokenhearted” and the missed opportunities for international healing resulting from our government’s decision to wage war rather than to hold the tension between reflection and action. One of the most intriguing interviews was with Peter Kingsley, an expert on the origins of Western spirituality, philosophy and culture, who suggested that we still might find, deep in our consciousness, threads of ancient mystery traditions that can heal trauma.

I have one niggly issue with the netcasts. The sound quality is generally good – even when Michael interviews guests by phone. Some conversations occur in front of a live audience at Commonweal. Members of the audience are invited to ask questions or make comments, but it is difficult to hear them on the recordings. Michael assures me this problem will be corrected at upcoming events.

Over time, I suspect this archive will become a central virtual repository for cutting-edge thinking about health, ecology and culture. It will also be a lasting testament to a common core belief-- held by Michael Lerner and Rachel Naomi Remen at Commonweal and many TWI grantees-- that dialogue with the emergent creates the capacity for greater awareness and deeper consciousness and that, in turn, creates the possibility for health and healing and compassion and community.

PACE Releases Guide on Deliberative Democracy and Democratic Governance

Pace (Philanthropy for Active Civic Engagement), a TWI grantee, has just published, *Funding and Fostering Local Democracy: What Philanthropy Should Know about the Emerging Field of Deliberation and Democratic Governance*. The guide lists some of the main organizations in the field, describes the most influential models and processes, and gives examples of democratic governance efforts. Aimed primarily at funders, it also contains information useful to community activists and public officials.

“As more and more foundations are making civic engagement a part of their funding priorities, they are also being presented with a whole new set of approaches and tools for engaging citizens at the local level,” says Chris Gates, the executive director of PACE. “This guide is an attempt to demystify the emerging field of deliberative democracy and help funders make more informed decisions about their support of this growing field.”

To download a free, electronic version of the guide, click

<http://pacefunders.org/publications/FundingLocalDemocracy.pdf>

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