

Cultivating the Next Generation of Philanthropic Leadership

KIM VAN PELT

Associate Director, Arizona Health Futures, St. Luke's Health Initiatives

RACHEL WICK

Director of Policy, Planning & Special Projects, Consumer Health Foundation

MELINDA ABRAMS

Vice President, Patient-Centered Coordinated Care Program, The Commonwealth Fund

Last fall the Robert Wood Johnson Foundation and Grantmakers In Health (GIH) convened the inaugural *Terrance Keenan Institute for Emerging Leaders in Health Philanthropy*, a fellowship program designed to engage Gen X practitioners from foundations across the country toward cultivating the next generation of philanthropic leadership.

The fellowship was conceived as a way to honor Terrance Keenan, a career program officer at the Robert Wood Johnson Foundation, leader in health philanthropy, and one of the founding members of GIH. Keenan – who died in 2009 – was a mentor to many in the field and wrote extensively about the attributes of great philanthropic leaders and organizations.

Seventeen fellows came together in Washington, DC, last September for an intensive workshop. The diversity among us was striking. We were men and women; racially and ethnically diverse; married, single, gay, and straight. We had educational backgrounds in areas such as public policy, medicine, law, and engineering, and all of us were currently working as program officers at health foundations. We were joined by six

philanthropic leaders believe deeply in the benefits of partnership and collaboration among foundations and between foundations and grantees. They engage in continuous improvement, reflecting on their past performance and engaging in self-renewal. They are deeply invested in supporting the success of their grantees. And they are committed to transparency, sharing their learning and experience in the public domain.

Keenan's vision for philanthropy was one that resonated deeply with our class of fellows, but the question that kept coming up was whether the field of health philanthropy (and philanthropy in general) has actually embraced it. We had a great deal of discussion about whether foundations actually supported more traditional or conventional forms of leadership, which prized institutions' autonomy and individual accomplishments while avoiding risk and transparency.

There were also big questions around whether the field was really committed to grooming its leadership from within. Increasingly, fellows saw foundations bringing in staff and executives from outside their organizations and from other sectors like business, government, and think tanks. Though we were there as emerging lead-

Great leaders are informed and animated by a sense of moral purpose. They are humble and willing to take risks.

seasoned leaders from foundations across the country who served as faculty for the fellowship. They were our mentors, guides, and facilitators throughout two days of dialogue and debate.

The meeting was centered on the teachings of Terrance Keenan. Fellows were asked to read excerpts from his monograph *The Promise at Hand: Prospects for Foundation Leadership in the 1990s*, as well as "Terrance Keenan: An Appreciation" by Digby Diehl. Keenan wrote about how great leaders are informed and animated by a sense of moral purpose. They are humble and willing to take risks. Great

ers for the field of philanthropy, a path to further leadership was not quite clear. The seasoned foundation leaders acknowledged that leadership development for the field had not really been a topic of discussion among their peers. One of the fellows from a corporate foundation was very surprised to learn that philanthropy had given so little thought to cultivating and growing its own talent, something successful corporations had been intentionally investing in for years.

At the start of the second day of our meeting, the group decided that we needed to shift our focus to the future. Together, we reached consensus that there were opportunities

to exercise leadership in our current positions, and that we should lead the charge for changing how philanthropy itself operates. We recognized how the world is changing, and it is imperative that our field evolves its culture and practice to meet these new challenges.

We had a robust brainstorming session on a vision for philanthropy in the future, and the following recommendations emerged:

- Reconfigure philanthropic staffing structures to move toward team-based models that blend disciplinary specialties (health, housing, and environment) and diverse skill sets (advocacy, evaluation, and finance). This could also mean fostering longer-term structural collaborations between and among foundations working in the same geographic footprint. One fellow called this “shared front office.”
- Develop incentives and rewards that encourage program staff to take risks. Take the time to learn from projects or programs that do not go as planned, and share those lessons with others.
- Embrace a culture of greater transparency about priorities, proposal guidelines, selection criteria, funding areas, and outcomes.
- Create shared evaluation strategies among foundations working on the same issues or in the same communities to measure and publicly report collective and community impact, while at the same time recognize the unique contributions of individual foundations.
- Recognize philanthropy as a legitimate career, and cultivate talent and collective leadership within foundations.

At the GIH Annual Meeting in March, our class of fellows had an opportunity to reconvene during a preconference session for a presentation and conversation with Gabriel Kaspar on the Monitor

Institute’s *The Future of Philanthropy*. It was energizing and affirming, as many of the report’s recommendations were quite similar to the vision for philanthropy that we constructed at our meeting in September.

The annual meeting also for the first time featured a “What’s Keeping You Up at Night” breakout session for program staff. This is a session format GIH has used with CEOs and trustees for many years and is designed to create a safe space for conversation about issues of concern. It was clear that program staff appreciated the opportunity to discuss some of the practice-based challenges that arise at foundations. The big topic of discussion was how foundations could execute graceful transitions when it came to changes in staffing, leadership, and funding priorities. We think these are important topics for our field to continue to explore.

Perhaps the most important part of the fellowship,

though, has been the network of relationships that develop when experienced program officers are given the space and time to think, talk, support, and learn from one another. We believe that these new relationships have the potential to generate change for our field. Some fellows have begun collaborating on special projects. Others who live near one another have agreed to meet regularly to share ideas and build local networks.

In launching the first Terrance Keenan Institute, GIH and the Robert Wood Johnson Foundation created a new space in the field for thinking about the next generation of philanthropic leadership. We think this is a conversation worth continuing and hope that health foundations across the country will join in the effort. Following are some potential next steps for foundations interested in working together and with GIH to move this work forward:

- Support the Terrance Keenan Institute and other opportunities for leadership development and mentoring for emerging leaders.
- Continue discussions of how the field might improve and sustain leadership development efforts, and build “career tracks” for those working in the profession.
- Create formal opportunities for dialogue between seasoned leaders and emerging leaders to share knowledge and ideas.
- Provide assistance and recommendations to foundation boards and executives who are beginning to contemplate succession planning. Encourage foundations to cultivate leadership within institutions and consider candidates working in the philanthropic sector.

In his introduction to Terrance Keenan’s monograph on foundation leadership, Steven Schroeder, former President of the Robert Wood Johnson Foundation, aptly described philanthropy as a craft and Terrance Keenan as its master

Perhaps the most important part of the fellowship, though, has been the network of relationships that develop when experienced program officers are given the space and time to think, talk, support, and learn from one another.

craftsman. He noted that the master craftsman possesses knowledge of self, skills and tools, an eye toward perfection, and intuition. “He or she must be a teacher who can develop the skills and inspire the instincts of those who will follow.”

Cultivating the next generation of philanthropic leadership is really about the craft of philanthropy. It requires all of us to focus our attention on the unique aspects of the practice and the people engaged in the work.

VIEWS FROM THE FIELD is offered by GIH as a forum for health grantmakers to share insights and experiences. If you are interested in participating, please contact Faith Mitchell at 202.452.8331 or fmitchell@gih.org.