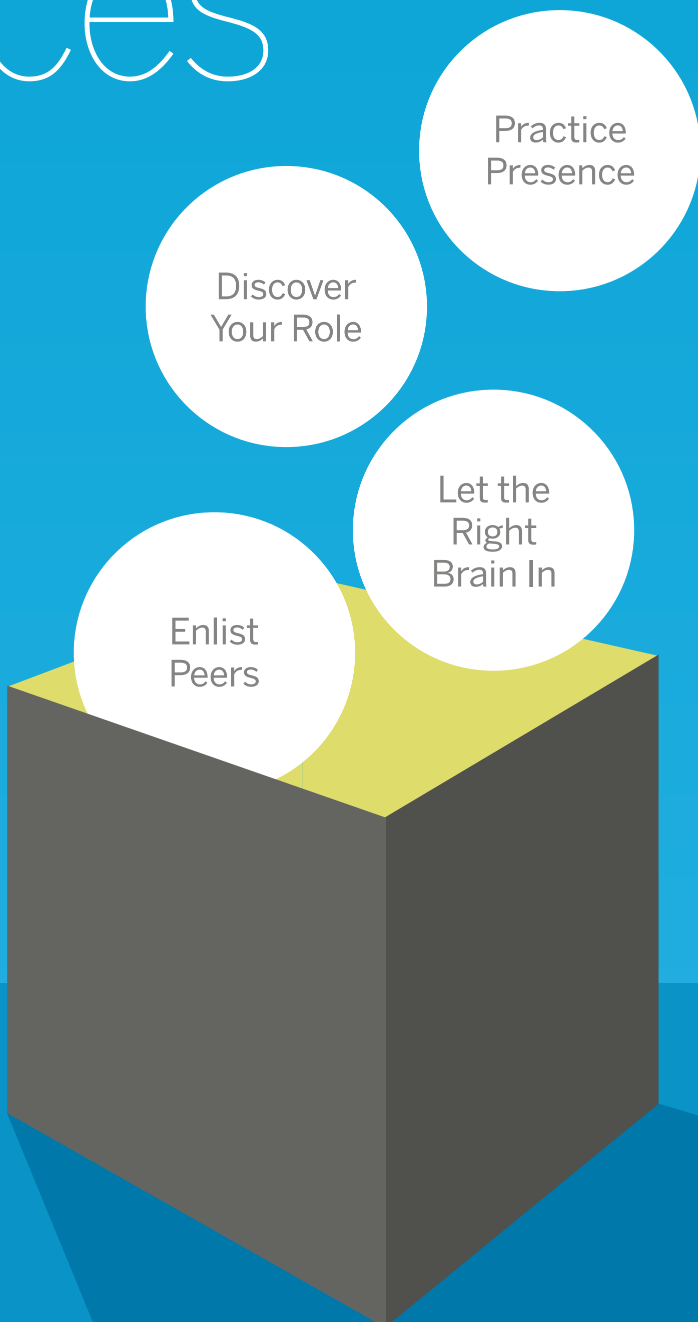
DIY SERIES

# Philanthropy's Reflective Practices




## Build What You Bring to the Work

The GIVING PRACTICE

# Contents



Developed and written by Jan Jaffe, The Giving Practice

Developmental editing by Mark Sedway, The Giving Practice

Design by Karen Gibson

Many colleagues helped improve the guide by offering comments along the way. Thanks to Kiran Ahuja, Carrie Avery, Courtney Bourns, Rosalie Sheehy Cates, Dawn Chirwa, Lisa Galaites, Audrey Haberman, Katie Hong, Sindhu Knotz, Kara Laverde, Hanh Le, Ted Lord, Hilary Pennington, Janis Reischmann, Kristen Ruff and all the Philanthropy Northwest staff who offered to test pilot and share the results of their reflective practices at work. Special thanks to philanthropy practitioners (see page 12) who offered their stories about reflective practices in action for this guide and to those who contributed to the guide through blogs at www.reflectivepractices.org.

The Satterberg Foundation, Ford Foundation, and Hemera Foundation made grants to Philanthropy Northwest that supported the development of this guide.

Philanthropy's Reflective Practices is a project of The Giving Practice, the national consulting firm of Philanthropy Northwest. Learn more about us at www.thegivingpractice.org.

Think of a time in your personal or professional life when you…

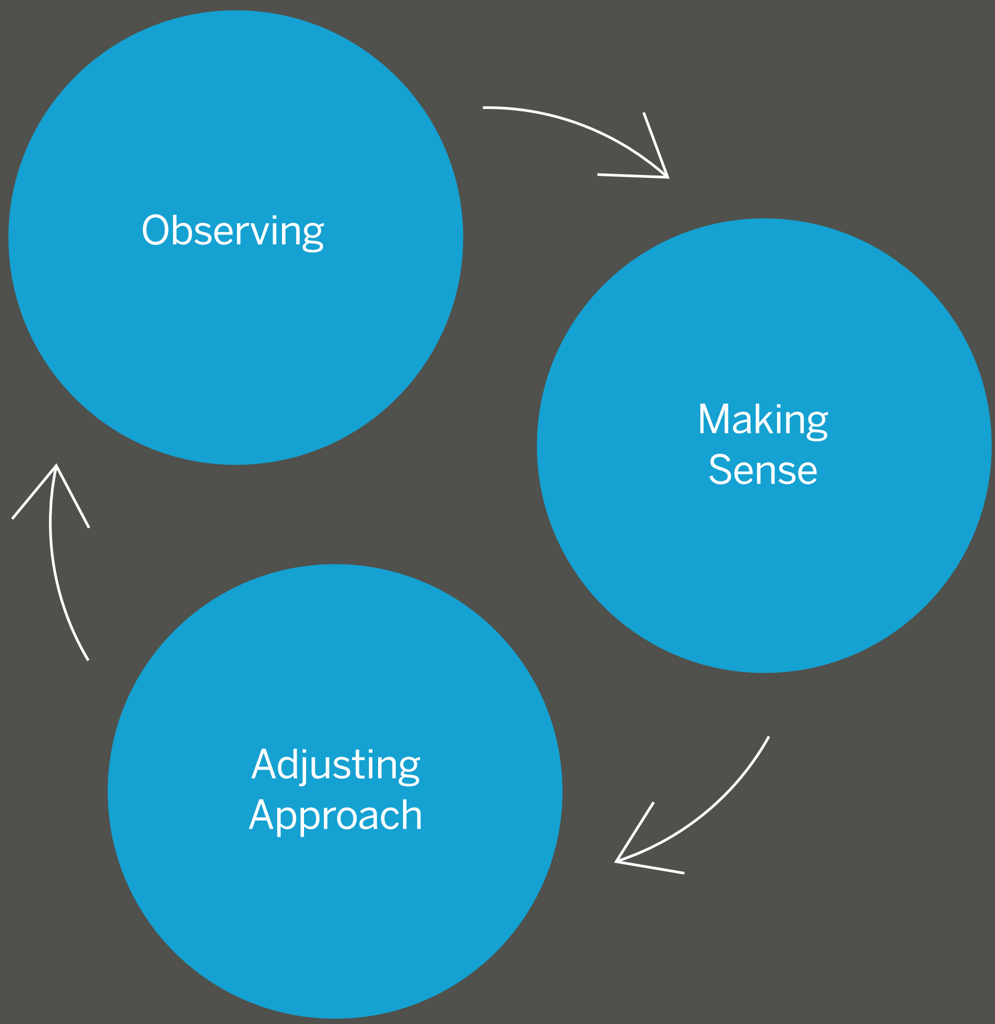
Wrote down observations before or after a challenging conversation that illuminated the bigger picture.

Made sure to explore what was going on beneath the surface of a meeting.

Paid attention to your body, breath and the thoughts running through your mind, before you weighed in on a contentious comment.

Enlisted peers to consult on a dilemma.

**These are reflective practices.**




**Reflective Practices n. pl.:**

Tools and techniques that can help you navigate challenging situations at work.

Every reflective practice involves three steps: observing what is happening within and around you, making sense of what you see, and adjusting your approach to get to a better outcome.

# What Reflective Practice Is (and Isn't)

## What makes some people more effective at navigating challenging situations than others? Have you ever marveled at someone who gamely wades into an uncomfortable conversation or complicated high-stakes situation to help find the right way forward?

It's not about technical competency or natural ability. What makes these people effective in turbulent waters isn't that they have the perfect paddle stroke. Sometimes what they do even feels a little awkward—to them and others. But in they go, staying curious instead of frustrated when projects flounder, looking for the unspoken but deeply felt concerns in a conversation, helping groups use new knowledge and approaches to reach their desired destination.

Reflective practices are the methods that help you observe what is happening during challenging situations, make new sense of what you see, and adjust your approach to get to better outcomes. They generate new perspectives on challenging situations in your work. They help you find the space that neurologist and psychoanalyst Viktor Frankl described "between stimulus and response" to make choices about how you will show up. They support your own growth and your ability to contribute to transformative work.

| What Reflective Practice IS NOT | What Reflective Practice IS |
|---|---|
| A Retreat From Work | A Deeper Dive Into Challenges |
| Navel-Gazing | Situation Navigating |
| The *What* of Your Work | The *How* of Your Work |
| Self-Care | Group Care |
| Technical Training | Adaptive Training |
| Mostly About Reflection | Mostly About Practice |

There are many reflective practices, but ultimately, all reflective practices work their magic by taking you through a three-step process.

**First, you observe what is going on within you and around you.** This step is needed in all situations but especially when the stakes are high. You might pause to take a mental snapshot of a moment or have a sidebar notetaking method to make observations during a meeting.

**Second, you make sense of what you observe.** You dig beneath the surface of a conversation to understand what may be blocking movement. You try to decipher unclear behaviors (yours and others') that you're encountering. You invite yourself and others to check in on implicitly held assumptions, beliefs and values.

**Third, you adjust your approach based on what you learn**, reframing what is needed to get to better outcomes and shifting your behavior—alone or as a group. All this may happen quickly, in action. Or you might follow the cycle as you prepare for a meeting or conversation or debrief something that happened.

This guide offers you an opportunity to review reflective practices that your colleagues have used to advance toward ambitious changes at their foundations, with their teams and with partners in the field.

**Some Methods Used by Philanthropy Practitioners**

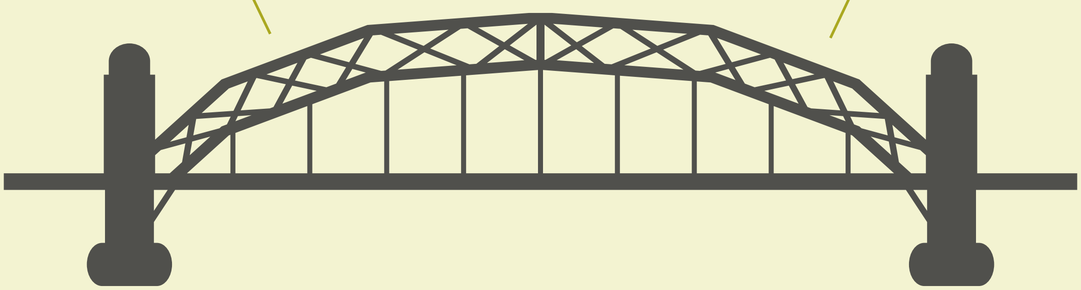
- Match roles to situations
- Pay attention to role strain and ambiguity
- Learn from your pinches
- Lean into a consultative stance
- Use a contemplative practice
- Bring a third object (images, stories, etc.) to a difficult conversation
- Enlist peers to learn from dilemmas
- Explore assumptions and beliefs "beneath the waterline" in conversations

**Think of reflective practices as mental bridges that you build to traverse challenging situations.**

They help you go from known territory to unexplored territory where deep learning takes place.

They give you a perch for taking stock and getting new perspectives.

Like bridges, there is no one reflective practice. You have to build something that will work in a particular context.



## Take Your Reflective Practice to Work

Methods to reflect have been part of many spiritual, religious, cultural and artistic traditions for thousands of years. For almost a century, scholars and organizational theorists have written about reflective practice methods used in education, law, medicine and business. Because there is nothing new under the sun, each reflective practice borrows from another and many are standing on the shoulders of giants, sometimes without attribution. You may have learned a reflective practice that originated in one of these traditions.

It makes sense to take reflective practices to work. We take actions big and small every day. And we react to what happens, often without reflecting on our contribution to the outcome. Absence of reflection limits us from understanding what we are creating and putting out into the world. When we don't reflect, our mind is on "automatic," leaving us vulnerable to our conditioning, which can include implicit biases as well as limited storylines about what is happening. In other words, we are not building on what we can bring to the work.

# Why It Matters in Philanthropy

## You choose to work in philanthropy because you have a passion, competence and commitment related to a place or field or issue. Keeping a deep connection to your field, place or issue is your first discipline. *How* you put your content expertise to work is your second discipline.

We've talked to hundreds of philanthropy practitioners  and it is not the *what* but the *how* of the work that keeps them up at night. For example:

- **Saying yes:** How do I cocreate proposals with applicants? How do I get beyond the ritual of stamping each other's passports and then continuing on as citizens of separate countries?
- **Saying no:** How do I say no to a good idea with grace and clarity?
- **Working as a boundary crosser:** How do I navigate the boundaries of my organization and those of partners to share new insights and different perspectives?
- **Managing the volatility of innovation:** How do I navigate norms and orthodoxies when I'm introducing or being introduced to new ideas? How do I know when to lead and when to follow?
- **Checking implicit bias:** How do I help myself and my organization stay alert to racial, gender, sexual orientation and age biases during scans, strategies and day-to-day conversations?
- **Managing adulation and contempt:** How can grantees and grant seekers trust me as a reliable partner? Should I trust them? How do I manage the projections that inevitably come with power imbalances?

These are what Don Schön, MIT philosopher and educator, called challenges that might require content knowledge but don't have technical, "high-road" solutions. He observed that most important work takes place in the lowland or **"swampiness" of challenges that have no one right answer and require self-knowledge, collaboration and relationships to develop solutions**.

Ellen Schall, a senior presidential fellow at New York University, reminds us that a practitioner's effectiveness is tied to learning to love the messiness of lowland work. Building on her work with public and nonprofit leaders, she encourages us to develop reflective practices that lead to explicit theories of action that can be tested, adjusted and shared with others to strengthen the *how* of work across a field.

## Let's Make Reflective Practice Philanthropy's Second Discipline

**The times demand it.** The Army phrase of living in a VUCA world—volatility, uncertainty, complexity, ambiguity—has reappeared in leadership training lexicon for good reason. Reflective practices can help you work more effectively in constantly shifting environments.

**The science supports it.** Research on the neuroplasticity of the brain over one's lifetime has produced a plethora of popular and scholarly research that confirms what we have known all along. We don't have to stop growing our mindset after childhood. As adults, we need reflective practice methods for continuously learning how to create authentic connections with others to make a difference in the world.

**Other sectors do it.** In health, education, social services and the law, you can find programs to help practitioners use reflective practice methods to achieve better outcomes with their colleagues and clients. Leadership training programs are increasingly premised on the value of developing self-knowledge to enable people to better connect and solve problems in rapidly changing environments.

**The wheel doesn't have to be reinvented to learn it.** You already use reflective practices. By making it more explicit, you'll discover what you already know and what else you want to learn. You can find an approach that matches your strengths and you can find ones that will stretch you. Your best teachers may be your best grantees. In fact, don't go it alone: this is a wonderful way to bring together grantees and foundations for shared learning purposes.

**The unique work of philanthropy requires it.** As funders, you need methods to manage power dynamics, cocreate solutions, see what's missing and what's new, and take risks with money and voice. Philanthropy practitioners leading with transformation goals such as greater diversity, equity and inclusion in a field or inside their organization tell us they use reflective practices to help them dig deep and stay the course as they pilot experiments, encounter "how we've always done it" resistance, and suggest new behaviors that create initial discomfort.

"Gain new insights and ideas when learning alongside peers."

"Have less anger and frustration, which allows me to see good intentions in others to solve problems in service of mission."

"Be candid about 'learning out loud' and thereby inspire greater trust."

## Why philanthropy practitioners say

"When there's a lot going on, I can find myself reacting too quickly, overreacting, spinning or procrastinating. Taking the time for reflective practice brings greater intentionality and ultimately more productive and fulfilling outcomes."

"Negotiate conflict more effectively."

"Identify blind spots."

"Spot my patterns, both positive and negative, and course correct when necessary."

"Clarify for myself (and others) what assumptions I was working under and actually test those assumptions."

"Be able to listen to others more deeply."

## they use reflective practices …

"In my old practice, I'd endure a difficult conversation, go away, calm down, find clarity, then return to the person and have a better conversation. Now I practice stopping difficult conversations midstream, ask for a moment to figure out what's going on, or even ask that of myself and who I'm talking to in the moment. I look for better ways to show up now, rather than the next day after the conversation. It's not easy but I'm getting there, and it saves a lot of time and energy."

## What's in This Guide and How to Use It

We interviewed dozens of people in philanthropy about their reflective practices. All have a variety of styles and perspectives and are of diverse races, ethnicities and gender identification. Some have positional leadership and others exercise leadership regardless of their job title. They are in all kinds of foundations.

We asked them for stories about how they handle challenges in their work and found patterns that led us to identify the **four reflective practices highlighted in this guide**. You'll learn just from reading colleagues' stories. Each section includes something about the roots and the research behind the practice. We've created exercises that you might want to use to expand your own practice tied to these techniques. In addition, we created an appendix with readings that might be of interest to you.

These practitioners would tell you that their own practice is a work in progress and would name someone else they'd like to emulate. The stories are here to contextualize the methods and not to imply that they have the answer. **We thank them for their willingness to be vulnerable and imperfect so we can all start a conversation about our practices.**

Start anywhere. Come with your own dilemmas in mind. Use any of the practices to get a fresh look at what you are doing when you are in murky waters. They can help you make adjustments to your own behaviors. While there is no guarantee that they will change the outcome, using these practices can have the alchemical effect of **turning turbulence into transparency** and make it easier to navigate toward the changes you and your partners want to see.

Go to **www.reflectivepractices.org** to find blog posts from these practitioners and others as well as more tools and readings.

### Reflective Practice Contributors

Janna Bilski
*Ford Foundation*

Courtney Bourns
*Henry P. Kendall Foundation*

Amy Brown
*Ford Foundation*

Shona Carter
*Community Foundation for Southwest Washington*

Ryan Chao
*Annie E. Casey Foundation*

Nick Deychakiwsky
*Charles Stewart Mott Foundation*

Kris Hermanns
*Pride Foundation*

Katie Hong
*Raikes Foundation*

Rob Kaufold
*Hemera Foundation*

Kara Laverde
*Bill & Melinda Gates Foundation*

Hanh Le
*Weissberg Foundation*

Isaac Luria
*Nathan Cummings Foundation*

Taina McField
*Nathan Cummings Foundation*

Andrew Merz
*Padosi Foundation (formerly of Hemera Foundation)*

Gihan Perera
*Ford Foundation*

Janis Reischmann
*Hau'oli Mau Loa Foundation*

Doug Stamm
*Meyer Memorial Trust*

Bob Uyeki
*Y & H Soda Foundation*

Luz A. Vega-Marquis
*Marguerite Casey Foundation*

Edgar Villanueva
*Schott Foundation*

Darren Walker
*Ford Foundation*

David Wertheimer
*Bill & Melinda Gates Foundation*

June Wilson
*Quixote Foundation*

# Four Core Practices

## There are dozens of practices that can serve as mental bridges to get you from where you are stuck to better outcomes.

We've focused on four core practices frequently used by the practitioners we interviewed. Even though these four practices have distinguishing characteristics, you'll quickly see how valuable it is to mix and match methods to construct the strongest and most elegant supporting structure you need for any situation.

**Discover Your Role**
How do you create roles that match what's needed in the moment? You work from an organizational/positional role, but you meet most challenges on the job by occupying situational roles that match the needs at hand. You bring who you are to each role. We offer ways to help you construct the right role and bring your unique skills and traits to it as a creative, reflective practice.

**Practice Presence**
How do you train your mind and body to pay full attention and respond to situations purposefully? Practitioners shared several methods that help them slow down, press the pause button on reactive orders from the brain, and pay deeper attention to what is happening around them. You'll find several methods—paying attention to hot buttons and pinches, leaning into a consultative stance, and using a contemplative practice—to aid active listening to yourself and others.

**Let the Right Brain In**
What can help you observe and make sense of contentious conversations or complex situations? Of course, analysis and data points are important for solving problems. They are philanthropy's go-to left-brain tools. When you need to surface assumptions, feelings or opposing thoughts, you may need to invite the right brain into the discussion. We've pulled together a few reflective practices for balancing left- and right-brain thinking during difficult dialogues.

**Enlist Peers**
Have you ever shadowed a colleague on a site visit? Or gained insight into a longstanding dilemma by talking to a colleague while waiting for a delayed flight or stuck together in traffic? Have you had a hallway conversation at a conference that was so good it paid for the registration fee? Curious about how to make this a practice when there is no site visit, delayed vehicle or conference coming up? Learn how to construct a bridge from a dilemma to a learning opportunity with peers in as little as 20 minutes.

CORE PRACTICE 1

# Discover Your Role

*Bring What's Needed to Each Situation*

## What do we mean by role? Think of roles as the behaviors you expect of yourself in any given situation. Your roles are the empty space in your job description—all the things that need to be done but can't be codified.

If you are like many professionals in a helping field, the idea of "being in role" might evoke an image of a wooden bureaucrat. Before you dismiss the power of situational roles, think like a sociologist for a moment. Your role is not only about your position. Regardless of your title, there are multiple behaviors—many not described anywhere—that you expect of yourself and that others expect of you in any situation. **You may need to be a listener, an amplifier, a boundary setter, a convener, a disturbance generator, etc.** You are always adjusting roles to be effective in a situation while keeping in mind your role in the larger system. (Think about cocreating a proposal with a potential grantee.) You are often in multiple roles at the same time. (Think about getting a text from a family member who needs a ride during a critical meeting about a program strategy.) We move in and out of situational roles all the time without naming them.

When we are under pressure, we often forget to be intentional about our choice of roles. This requires a pause and a step back to view the whole situation and figure out what is needed in that moment to help the individual, group and/or outcome move forward. Let's say you are the program officer leading a strategy review team meeting. Do you need feedback from everyone about this draft of the strategy because the next version goes up the chain and you don't want sleepy nods here and critique later? Is it time for competing ideas to be aired or time to move forward on long-vetted options? It may be a little of all those things. You need to find the role that matches the needs of the moment. Advocate? Analyst? Consensus Builder? Deal Closer?

**Don't keep your role insights to yourself.** Voicing your role in a situation often avoids confusion. Your partner or colleague may help amplify what's needed or will just appreciate your transparency. And of course they are constructing their role, too. It can be a moment of authentic exchange that can help build trust and advance the conversation.

## Be Aware of Role Strain and Role Ambiguity

Most challenging situations require roles that contain creative tensions, where you are pulled in different but equally compelling directions. For example, program officers often report that they feel like they need to be advocates and analysts of proposals at the same time. This is a case of "role strain." Each role is important, but they require opposing behaviors. You have to make sense of how to modulate between the roles to fit the context.

Many philanthropic roles are complex and therefore freighted with strains and ambiguity. Back to our earlier example: you may be well-known in a variety of ways in a community or a field, but when you are reviewing a proposal or joining a collaborative, you are representing your organization's needs. A good example of ambiguity is your role during site visits. Is it clear to you and have you been explicit about it with the applicant or grantee? Role strain and role ambiguity are usually not problems to solve but rather tensions to manage. It helps in these situations to observe and name the strains or ambiguities for yourself and invite your partners to notice what they are experiencing as well.

David Wertheimer, director of community and civic engagement at the Bill & Melinda Gates Foundation, gives us an example of classic role strain tied to starting up program strategies. In a blog at *Philanthropy's Reflective Practices*,[1] he comments on how foundation pressure to meet payout and reach impact in the short term can compete with the vital work of relationship building and joint strategy buy-in.

> ***"True systems change work isn't a sprint, but a marathon. If we move too quickly at the start, our pace is unsustainable and we'll be exhausted before the end of the race. Don't start the race until your partners are ready to join you."*** *—David Wertheimer*

We hear about role strain and role ambiguity from leaders of color in philanthropy, who often perceive that they are expected to represent a particular group or be an expert on issues of equity because of their own racial or ethnic background or lived experience. Several practitioners commented that this can feel burdensome and exhausting, as they may not want to be in the role of educating others or representing an entire group based on identity in every action they take. Others say that putting identity on the table makes it easier to advocate, but one has to manage feelings of being put in a box, or being reduced to one dimension of one's identity, or sometimes, facing one's own skill deficits.

1. reflectivepractices.org.

Shona Carter, a senior program officer at the Community Foundation for Southwest Washington, comments, "I am a black woman now working in a fairly homogeneous community. It's not that I don't understand or lead on equity issues: I do, and I care deeply about them. But prior to moving here, I have never had to have conversations with people who didn't understand why issues of equity matter. I felt like I needed to be the expert to prove myself, but I really didn't have a nuanced understanding of how to engage in these conversations. I sought out a colleague—another person of color—who encouraged me to lean into the conversations while admitting that I didn't have the answers and I was learning how to talk about equity in a new context and region. At the same time, I've been clear with my colleagues that I don't want to be the only person leading on equity."

## Know What to Bring and What to Leave Behind

Here is the paradox: While interactions can feel deeply personal, they are always role to role. Back to our earlier example, you may have a longtime relationship with a grantee as a close colleague. When your colleague is presenting a proposal and you are reviewing it, you are both in important roles to get the work done. You are representing the funder and she is representing her organization. But that doesn't mean you default to wooden, bureaucratic behavior because you are in these roles.

We asked Katie Hong, director of homelessness programs at the Raikes Foundation, how she manages the creative tension of being in role while staying authentic and true to who she is. "You have to understand what role you are playing in any given system as this is important to advancing change. At the same time, every individual, no matter what part of the system you are in, is powerful, and how you show up in the world is a choice. That is, you have the power to either cast a light or a shadow on the people around you."

What you bring to a role—good and bad—is what will determine how effective you can be. This means mobilizing not only your technical strengths but what you've learned from your own life experiences. And it includes managing your weaknesses (often the flipside of your professional and personal strengths) so they don't interfere with you when in role.

> ***"Growing up, I thought leadership and power came from institutional power and influence and it was all about 'hard skills' like strategic thinking and having a positional authority. Nobody ever told me that it was also an internal journey, doing the hard work of inner reflection and awareness so necessary if you want to positively effect change and transform the world."*** *—Katie Hong*

We always have a choice about how we want to relate to any role or situation. It's not the role that should define us; it's our choice to define the role. However, we often have automatic reactions to roles that come from our conscious and unconscious associations to them. If these reactions are left unexplored, we are no longer in the driver's seat. For example, loving a particular role may mean you overidentify with it and your brain tells you to match that role to tasks when it might not be the right way to go. Avoiding a role because it is uncomfortable for you to take up means you are not using all the tools at your disposal to handle a particular situation and get to the best outcome. We're in our most effective zone when we know our strengths and weaknesses and can mobilize and manage ourselves in all the roles necessary to get the work done.

Darren Walker, president of the Ford Foundation, talks about the challenge of staying aware of the self and role when working on a team, especially as the positional leader. "I'm aware that I'm drawn to generating ideas and making them happen. That's not a bad thing! If something looks like it is really transformative and we have the resources, I want to make it happen. That is both my strength and weakness. I've had to learn to be more consultative than decisive when I'm in a generative situation. Before agreeing to the next step, I try to pause and say, let me talk to people internally, get their sense of this."

TRY THIS

## Know Your Roles

**Part 1: For You**

**Three good questions to ask yourself in challenging situations:**

1. What are we trying to accomplish and what is the context?

2. What's my role given the situation and the context? What about role strain or role ambiguities?

3. In what ways am I comfortable being in this role? In what ways do I find this role hard? How do I want to identify with my role? How can I make that happen?

TRY THIS

## Know Your Roles

**Part 2: For Your Team**

**1. Review role.**

- Behaviors you expect of yourself and others expect of you in any given situation.
- The empty space in your job description.
- Role is what authorizes you to do the work.

**2. Discover most important team roles.**
Each person writes down six roles that team members must play to get the work done well. Each role gets a name and description on a card or Post-it.

**3. Create a role deck.**
Share your lists by putting the roles on a flip chart and grouping the commonly named roles together. Don't leave the outlier roles out of the picture! Be sure to include and discuss their value to the work and why they may not have been mentioned by all.

**4. Try these experiments:**

**Do a like/don't-like inventory.**

Invite everyone to put "+" next to roles they are comfortable being in and "–" next to ones that are harder to be in.

**Explore a stretch.**

Ask individuals to pair up and discuss "what might open up for me if I experienced taking up a role I don't like or avoid?"

**See the team system in play.**

If most of the team has the same "+"s and "–"s, it might explain what you do well as a team and what you don't. Discuss how you might add more diversity of roles on your team.

**Pilot learning from roles.**

Keep the list of roles readily available at meetings. Team members identify roles for complex or ambiguous situations. At every meeting, ask a different person to be the observer of how roles meet the needs of the meeting. Take five minutes at the end of the meeting to get feedback from the observer about roles aiding the process and the outcome. Ask all group members about their experience being in new roles.

CORE PRACTICE 2

# Practice Presence

*Put Your Oxygen Mask On First*

## Think of presence at work as a method to process your own internal reactions and signals before you jump to help (or inadvertently hurt) others.

Not unlike that counterintuitive flight instruction to put your oxygen mask on before helping someone else, practicing presence suggests that you will get to better outcomes by processing your own internal reactions and signals before you jump into stressful situations with teammates, colleagues or partners. William Kahn, Boston University organizational theorist, writes about presence at work as a time when "one's thoughts, feelings and beliefs are accessible within the context of role performance." Everyone we interviewed talked about such moments of presence as key to facing challenges as well as learning to shift strategies.

Practicing presence can boost your job satisfaction and performance because it helps you connect with others in a more meaningful way. Through that connection, you are more likely to take risks, to contribute ideas and to make the effort to move things forward—all increasing the likelihood of better outcomes.

> ***"Presence creates conditions of trust and safety that allow difficult conversations to be engaged and worked through such that individuals learn and grow and their systems become 'unstuck.'"*** *—William Kahn*

While we aspire to be fully present in the work, and recognize the cost of not doing so, we still can find ourselves resisting the shift in behavior it requires. Why? Practitioners talk about feeling pressure to be perfect in delivery and performance. That can lead to covering over one's vulnerabilities, whether it's about reactivity and hot buttons, skill deficits, or just plain confusion about what is going on in the moment of a conversation. By not being present with one's imperfections and discomforts, learning is limited for the individual and often for the group.

There is no one way to practice presence. When we interviewed Janis Reischmann, executive director at the Hau'oli Mau Loa Foundation, about how she approaches her own practice, she summarized her view this way: "It's not magic. It's intentionality." With that in mind, we next highlight three ways to be more intentional in the way you practice presence: Manage Your Pinches, Lean Into a Consultative Stance, and Learn a Contemplative Practice.

## Learn From Your Pinches

Imagine that you've finished the long, hard work of scanning the landscape of your field, talking to a lot of people, and making the case for a new program strategy, and you now have the green light to start making grants. The strategy has been announced on your foundation's website and shared with the field. You show up at an important conference and join a lunch table that includes an influential grantee whom you overhear saying, "Why do foundations always think they know what's best for us?" In front of everyone. You sense some lunch partners leaning forward and others leaning back. Your heart beats faster. You're on the verge of either starting to argue or pretending like you didn't hear anything. Either way, you are "pinched," as Noah Nuer from Learning as Leadership would say, and if you are not managing the pinch, you are out of commission for learning or dialogue. You are not present.

Learning to be present and manage the feelings that come with those moments and experience them as data to learn from—rather than fighting or fleeing—can help us stay open to new information that feels threatening in the moment. **Staying in an open, flexible state of mind when we are experiencing what feels like criticism or divergent views enables us to remain in a place of possibility.** We can even, over time and practice, reflect and adjust actions in real time. By learning how to do that, we remain part of the solution. This connects to both ancient wisdom and recent action research about preparing the body to be present.

The Learning as Leadership team suggests that we start by paying attention to the actual physical reaction or "pinch" in those moments. We all have body signals. Is it a flushed face? How about faster breathing? Do you catch yourself revving up to go on the offensive? Do you feel numb and shut down? These signs are "gifts" from your body to your mind that it is time to listen deeply before saying anything more. In our lunch table case, it might give you an opportunity to ask whether you are unconsciously reading a threat to your self-worth in the situation. Noah Nuer writes that of course **others can't really pinch us. We pinch ourselves through learned and personal experiences.** Staying present to the unique sensitivities that cause reactions in us is valuable if we want to stay present, respond productively and learn from others. If we change our response, we change our reality.

In the case of the conference lunch table, the first step is observing your own reaction to the pinching comment, for instance, "They think I'm arrogant and elitist." Noticing that you may be overinterpreting one comment can create space to expand your understanding of what was meant and determine if there is a learning opportunity. You might wonder if the grantee is expressing the pain of not being included and heard enough. The learning opportunity might be that despite how much work you put into this, you also avoided a deep conversation with this grantee during the strategy formation because of your style differences. She may be conveying important information that goes beyond the way she is delivering it. In that moment, having the courage to be vulnerable or, as University of Houston research professor Brené Brown puts it, **"to be imperfect" can open up an opportunity to invite learning in the moment or later on**.

June Wilson, executive director emeritus of the Quixote Foundation, brought her years as a dancer and choreographer to practicing presence, including paying attention to her own physical signs of discomfort. If something is too hard to process and is distracting her from being fully present, she advocates "taking a moment to pause" in the conversation, which stops her from "immediately jumping to reaction or interpretation." To aid deeper conversations about racial equity inside her organization, she brought in consultants to help staff learn to pay attention to their physical reactions even though it was uncomfortable at times.

> ***"After all, many of us were uncomfortable navigating a conversation on race, so being uncomfortable exploring concepts physically, emotionally and experientially was not all that surprising. It helped us see things differently, work differently, approach our grantees differently, and engage with each other differently."*** *—June Wilson*

**There are times when people don't pinch us but we pinch them.** It can come from being in a position of power and authority. It can come from being a person of color, LGBTQ or a woman. Or it can come from a completely different reason. How do we know when and how to process other people's pinches? "I've learned to exercise wisdom and discernment when receiving feedback," says Edgar Villanueva, vice president of the Schott Foundation. Edgar has valued peer work at Rockwood Leadership Institute to de-escalate feelings of being pinched. His engagement with Native elders has helped him align with cultural practices that support listening and working with feedback. "Most important is that I am confident and secure in my own leadership. This has helped me be a better leader and able to receive feedback."

## Lean Into a Consultative Stance

How do you describe what you do differently when you are fully present? Dr. Kathleen Pogue White, an organizational consultant and executive coach, invites practitioners at the Annie E. Casey Fellows program to distinguish between taking up a helping or "consultative stance" and occupying a "reactive stance." **In the consultative stance, you are helping yourself and others advance thinking or action. In a reactive stance, you are protecting or holding your own agenda but not learning or building on what is going on around you.** Good consultation requires staying curious, asking questions, and looking for opportunities to join with the other person even though you may have different points of view.

As we interviewed philanthropy practitioners about their reflection methods, we heard many examples of how they shifted from a default reactive stance to a consultative one.

For Janis Reischmann, consultative stances have helped her be more intentional about managing the power dynamics of philanthropy. When there is a difficult or contentious gathering, Janis takes time to repeat what she thinks she heard at the end of the meeting. “There is a lot going on in the room,” she says, “all that ‘below-the-waterline’ stuff. There’s a chance people will say, ‘What? That’s not what’s going on at all.’ But it’s worse if they just leave feeling less understood.” She has observed that her personal style of interaction—enthusiastic and engaged—can be a liability in certain situations where power and authority can shape a conversation in ways the other person didn’t intend. Janis uses a personal prompt to make space during the conversation. “I put my fingers over my mouth, in a ‘hmm’ pose. It’s a quieting technique, a mental and physical reminder to give someone room and listen more carefully.”

Nick Deychakiwsky of the Charles Stewart Mott Foundation has developed his own prompt for staying in a consultative stance: tracking a conversation’s “time of possession,” the measure in football for how long each team has the ball. **“I ask myself, ‘How much time did I spend talking?’” he says. “The higher my time of possession, the less I’m going to learn and be successful at an essential part of my real job of staying curious and being a learner.** I try to keep an open mind: willing to listen, considering various points of view, understanding context and where people are coming from. I’m aware of my imperfections doing it. I catch myself formulating answers instead of listening … oops, don’t do that. I try to examine my own behavior in conversations. Where am I doing things that might be an irritant to others? What do I do when I talk more than I should because I am nervous about a situation with a grantee?”

Andrew Merz, a trustee of the Padosi Foundation and former director of contemplative programs at the Hemera Foundation, tells us about adapting a consultative stance he learned from his training as an interfaith hospital chaplain. “Contrary to the images that might come to mind—solemn priests giving last rites or quoting scripture at the bedside, for instance—at its core chaplaincy is a relational practice of presence and reflection.” At first, Andrew wasn’t sure how this would work as a program officer. Would it make him seem too interested or too soft? Then the “aha” moment arrived. In a phone meeting with a new grantee, he heard tension in the grantee’s voice and asked if it was “indicating that there was something important that he wasn’t allowing himself to say.” The new grantee acknowledged not wanting to alienate Andrew by asking for the money he really needed to get the job done. On his end, Andrew acknowledged feeling tension because he didn’t know whether the foundation could respond to the request.

**"Being present to everything in the field of experience means taking the risk of naming the elephant in the room or asking the uncomfortable question—turning towards, not away,"** he says. "What struck me about the interaction was how our nascent relationship instantly changed. The relief was palpable, as if we'd opened a window and let more oxygen into the room. We could *really* talk."

Part of being fully present is knowing how and whether to explore the other person's reaction to what you are saying or doing. "I've been in many experiences when I'm the only queer person in the room and I experience something that is deeply offensive," says Darren Walker, the Ford Foundation president. "When people make blatantly homophobic, racist or sexist comments, it's critical to respond and engage. You frontally take on what you heard ... I decided never to ascribe an evil intention, even though I know that some comments were evil-intended. I choose to take the high road in order to engage: *I'm sure I didn't hear you right. I can't imagine that what you said meant to be ...* Most often it gave the other person a chance to recalibrate what they said or did."

TRY THIS

## Resist the Temptation to Be an Explainer

Share these characteristics before a meeting starts. Ask your colleagues to pay attention to consultative versus reactive stances as you work together.

**Me? Reactive? Here are a few messages that are likely to make others defensive:**

- Outshine: *Let me fine-tune your thought.*
- Criticize: *Let me show you why I think your idea makes no sense/has failed/is incomplete/is off the mark and why I have a better idea.*
- Avoid: *Let's find the bright side and not go to the conflict.*

**If you'd like to restore collaborative communication, find your consultative stance:**

- Appreciate and explore the differences: *I like your reframe. Let's see where the differences in our thinking might be.*
- Partner and go for a stretch: *I'm sure that you have already thought of this, but ...*
- Appreciate and connect to a "teaching point": *I like your thinking. I think my ideas connect to yours in this way ...*

## Learn a Contemplative Practice

For our purposes, a contemplative practice is a routine that creates time for reflection with an intention to grow the mind's perspective on what is happening around it. There are myriad practices—some involve sitting and paying attention to the breath; others are more active, including walking in silence, tai chi, yoga and other physical endeavors. In all these practices, you are using the body to teach the "inevitably wandering mind" to come home to the present moment. Practitioners report that contemplation creates greater self-awareness by helping them observe and detach from their thoughts to create space for greater compassion and connections to others and the world around them.

Jon Kabat-Zinn, scientist, writer and meditation teacher, describes contemplative practice as "paying attention, in the present moment, nonjudgmentally." Paying attention could include noticing one's breath, emotions and thoughts (and pinches). Kara Laverde, deputy director of People and Organizational Potential at the Bill & Melinda Gates Foundation, reflected on the importance of this practice for philanthropy.

> ***"The nonjudgmental aspect of presence is an interesting area to explore for philanthropy practitioners. When and how do you let go of your agenda and goals to truly listen and partner?"***
> *—Kara Laverde*

**Philanthropy Practitioners Share What Helps Them Get Better at Being Present**

- Start each day with a few minutes of silence.
- Meditate for 10 minutes every day.
- Don't open emails in the morning.
- Use my commute for silent reflection.
- Carry a journal and write briefly when I have a reaction (positive or negative) during the day to ask myself what happened and how I felt at the time.
- Schedule regular time for reflection writing.
- Give myself five minutes of quiet time between meetings.
- Before every meeting our board explicitly acknowledges that our meeting is being held on Native lands. It is so simple, but feels so grounding and brings us into the present around principles and values.

In the last ten years, technological advances have helped scientists study the impact of contemplative practices on health and the mind and conclude there is evidence that it aids focus, increases emotional intelligence and reduces stress. **Medical research centers are producing papers on how meditation changes our brains to improve self-awareness and well-being and even the development of new cells in the brain region associated with learning.** And recent studies have also shown how contemplative practices can reduce unconscious or implicit race and age bias. (See Appendix for research resources.)

Even with science backing up the value of integrating the body and the mind, do you find the idea of a contemplative practice outside your comfort zone? Think about the cost of not having a practice. We spend so much time impulsively reacting to misfires at work that it has a name you'll recognize. The "staircase syndrome" describes us perseverating about all the things we should have said or done as we walk down the staircase from the scene of what we deemed as an embarrassing, humiliating or frustrating interaction. These reviews are not the same thing as a reflective practice! But they take a lot of time and energy worth recapturing for more meaningful interactions.

## Contemplative Practices at Work in Philanthropy

Courtney Bourns found the core training of mindfulness very helpful in her role as senior program officer at Henry P. Kendall Foundation. "I find teachings about contemplative practice a helpful metaphor for the most important aspect of my work in philanthropy: it's about allowing things to happen, letting things go but not abnegating all authority. **It's helped me pay attention to the questions of Where can I let go more? and Where do I need to lean into the tension more?** Your role is to facilitate and support other people acting in a certain direction. The trick is to realize that is your role and it is not to take over and have the direct action."

Some foundations have created space to support contemplative practices. The Bill & Melinda Gates Foundation has a "reflection room" and a weekly meditation drop-in session in its Seattle and London offices that started as a pilot by staff interested in contemplative practices. They brought in a consultant to lead a mindfulness program, which has now been running for several years. A staff member in the evaluation unit offered to measure impact of the program: participants reported a 61 percent increase in ability to focus and give full attention to the task at hand, a 69 percent increase in being proactive (rather than reactive), and an 85 percent increase in perception of time to think, innovate, work and plan. "We also offer Being Present and Personal Resilience as part of our new leadership workshops," says Kara. "People are hungry for these kinds of offerings!"

Janna Bilski works in investments at the Ford Foundation and is also a meditation teacher. She guides two weekly half-hour classes for anyone at the Foundation who is interested. She has also started organizing all-staff events focused on highlighting the power of reflective practices with teachers such as Sharon Salzberg and George Mumford to speak about their work. Amy Brown, senior program officer at the Foundation, says, "I do feel like our weekly sessions have strengthened my own ability to advance social justice without getting overwhelmed or disheartened.

> **“ *Janna often describes meditation as a way to cultivate an inner peace that will allow us to more productively engage the storm that is the world around us. I have found that framework useful."*** *—Amy Brown*

Gihan Perera, a program officer in civic engagement and government, adds, "I want freedom. I pursued it with a vengeance, a striving for justice that was full of all the justified anger, rage and roar of youth against oppression. I found over years and from elders that liberation begins from the inside, and that political consciousness is only true when free of my own personal bias and free of the reactions and illusions of identity.

> **“ *Contemplative practice helps me let go of the small stuff and see the bigger picture, the universal view. It helps me very practically get myself away from toxic conflict, see where I'm overreacting, and see opportunities in situations that I may otherwise see as bleak. I experience GRATITUDE, and find wisdom in daily life. I am finding peace in not thinking I have to figure it all out."*** *—Gihan Perera*

The Nathan Cummings Foundation has a long history of integrating support for contemplative practices into its grantmaking and helping staff and board practice presence together. Taina McField and Isaac Luria, members of the program staff team, note, "If we want to see contemplative practice as a tool, it has to be integrated into the DNA of the organization. We are a new program team, establishing our culture and thinking about how we use these practices in new contexts."

As an example of using contemplative practices to focus their own meetings, they described a high-stakes conversation about a proposed new structure for collaboration across teams to improve impact in a field and to help them be responsive to the moment and to their partners. “As a new team, we risked entering into this conversation in an anxious mode where we experienced scarcity as the overarching paradigm plus a sense of urgency that would make it harder to get to the right decision for the moment.

> ***Like many organizations we have deadlines, fears of performance, learned behaviors around approval-seeking from our colleagues, and varied ways of managing our anxiety around that. So, we started with a meditation around gratitude and abundance. It brought the temperature down and we could see the conversation as an opportunity and not just a set of deadlines or risky plans seeking leadership approval to move forward.***

We could then turn more thoughtfully to getting the buy-in of the entire organization on our plan. We approached our challenge with more equanimity, advanced the ball and built a plan with trust.”

CORE PRACTICE 3

# Let the Right Brain In

*Put Something in the Middle of Difficult Conversations*

**Sometimes words need an aide-de-camp to catalyze authentic dialogue. Images, metaphors, stories and poems can encourage a different kind of sensemaking for moments freighted with history, unspoken expectations, or lack of clarity. If a dialogue between you and me is stuck, then talking through a third object, like a poem or image, may help deepen the conversation.**

Chuck Palus and his colleague David Horth at the Center for Creative Leadership describe this reflective practice as "reducing anxiety and defensiveness in complex situations by 'putting something in the middle' to sustain attention to what's hard to talk about."

We are an explaining field. Philanthropy practitioners gravitate to left-brain thinking—the logical, sequential, analytical thinking that focuses on the parts of a system. There is nothing wrong with that! Foundations hire for technical expertise—whether it is about disparities in household income, racial and gender equity, global shifts in constitutional law, the cost-benefit ratio of solar energy, economic trends in a community, etc.—and why not? Grantees prefer program staff who understand and can add value to their work. But precise knowledge has its limits.

It isn't the whole picture. The right brain focuses on synthesizing more random data and looks for whole pictures. This is where objects, images, stories and poems can advance new, generative thinking and identify different patterns. An object becomes the focus rather than our reactions to the other person's personality, style of presenting or differing viewpoint. There is some evidence that images can interrupt how we see the norm and that may also be what helps make these third objects so powerful. For example, there have been studies that show evidence that images, along with education, can help "undo" subconscious racial and gender stereotypes and implicit bias. (See Appendix for research resources.)

Next time a program strategy needs input from people with different points of view, your collaborators seem stuck and silent, or a norm-challenging idea needs examination, try putting something in the middle to spark and sustain generative conversation as a reflective practice.

## How Philanthropy Practitioners Let the Right Brain In

As chief executive officer of the Pride Foundation, Kris Hermanns had an annual report to put out right after the mass shooting at an Orlando nightclub. It had shocked everyone to the core, and it was not time to do business as usual. "I know myself well enough to know that if a decision isn't coming to me easily, or if I have a sense of dread or uncertainty, I have to pay more attention to it," she says. "It just didn't feel right to write a letter from leadership." Kris writes poetry as a personal reflective practice. For the annual report, she included "Inspired by a Belief," where she explored her feelings about how cruel the world can be, how important it is to respond in a healthy way, and how reasonable it is that people feel hurt and pain. The poem **created space for a different conversation** with those who read and responded to the report.

Ted Lord, a senior partner at The Giving Practice, queried clients and colleagues about poetry that could be used to open up a dialogue that needed to happen but was stuck in some way. Within a few hours, he had a compendium of poems for Philanthropy's Reflective Practices that were used to **help untangle classic, knotty moments in grantmaking**. Colleagues used poetry to shift conversations from the tactical to the strategic, amplify voices or perspectives of those not in the room, and reconnect a conversation back to its original intention. They took an outside object—in this case, poetry—and put it in the middle of a dialogue to shed new light and spark new thinking.

When Doug Stamm, the CEO of Meyer Memorial Trust, wanted trustees and investment managers to explore mission-related investments, he organized visits with MRI early adopters, speakers at board meetings, and board and staff attendance at conferences. While there was polite enthusiasm, he struggled to have a sustained discussion about the urgency and importance of MRIs to Meyer's mission. Then **he decided on a new gambit**. At a roundtable of investment managers and trustees, Doug put next day's *Oregonian* on the table with the headline "Dark Clouds Over Good Works of Meyer Memorial Trust." Above the fold was a story about Meyer supporting both the Children's Cancer Center and holding investments in tobacco. Following an immediate visceral reaction from the people in the room, Doug revealed the ruse—the story wasn't real but a mock-up designed to get a more authentic, grounded conversation going. And it did.

To facilitate a board conversation about the values that their foundation believed in, Hanh Le, executive director of the Weissberg Foundation, decided that **"serious play" might help smart, opinionated individuals take a deeper dive** on the topic. She distributed the lyrics of Katy Perry's "Rise" and invited board members to debate whether or not they represented the foundation's values. By putting something outside their normal realm into the mix of dialogue, the board avoided old patterns of conversation, had fun, and started an exploration that helped advance the foundation's mission.

## Right-Brain Activity for a Left-Brain Field

Use images to invite groups to consider a dilemma or task. The Visual Explorer™ deck[2] has images that are very evocative and diverse from a race, gender and culture perspective. Make your own image deck from pictures in magazines. Or invite colleagues to bring an object or image that represents their thinking on the topic that will be discussed.

Visual Explorer™ image

Some suggestions from Chuck Palus at Center for Creative Leadership on using images:

1. **Invite inquiry.** Ask participants to write down their own answers to a question tied to the issue at hand. It can be as broad as "What is our impasse?" or "What do you see as our primary task right now?"

2. **Find an evocative image.** Give participants an opportunity to choose an image that is aligned with what they wrote. It might be an easy find, or it might simply be something that speaks out without explanation. Don't overthink it!

3. **Journal what you saw.** Now ask participants to write down what is in that image that made them choose it. Share the images and why you chose them in trios, make time for each other to say what they see in the image as well, and then discuss commonalities and differences.

4. **Report back to the whole group** to discuss patterns for sensemaking purposes.

2. You can order the Visual Explorer™ deck from the Center for Creative Leadership.

CORE PRACTICE 4

# Enlist Peers

*Create Today's Watercooler*

## Enlist peers to learn about the *how* of each other's work. It's less about solving problems and more about building on each other's stories to create new knowledge.

A classic case about learning and communities of practice came in the late 1990s from what was then called Xerox's PARC, or Palo Alto Research Center. Their chief learning officer, John Seely Brown, hired ethnographers to figure out how Xerox's 21,000 technicians around the world learn to solve day-to-day problems that are not in the manuals. The ethnographers discovered that the technicians learn by telling each other war stories, sharing dilemmas, and building and discounting theories about what works in different situations—all during informal gatherings playing cribbage or around the watercooler.

Many interesting lessons were learned about knowledge transfer and communities of practice by studying these informal learning groups. In our digital age, these informal opportunities for building a joint narrative are few and far between. Too often we are alone with the dilemmas we face at work.

TRY THIS

### Try a Peer Consult

**1. Set out some rules of the road for participation.** Usually confidentiality agreements are key to establishing trust. The purpose is joint learning (remember the Xerox lads!), so there is no need to tell the dilemma presenter what to do or expect he/she will do anything that is discussed. Check in with everyone for suggestions about what it will take for them to be fully engaged in this activity. You may be surprised.

**2. Take time to write down the dilemma.** Write about the experience as if you were viewing it as a movie scene or from a balcony. This form of observation will help you float above yourself and see the incident as objectively as possible. Check to make sure it's an *incident of fact* and not a *belief* (e.g., fact: "A grantee and I disagreed and she went to my boss"; belief: "My partner undermined me"). Answer these three questions: What was I trying to accomplish? How did I go about it? What was frustrating for me?

**3. One presenter tells his/her story.** A counterintuitive tip: if you're the presenter, turn away to take notes or, at least, avoid eye contact while the group is discussing your dilemma. Why take yourself out of the picture? If you are facing the group, you will diminish your learning and those of others by unintentionally affirming or denying what is said with your facial or body gestures. By making your dilemma but not yourself visible, your colleagues build their own conversation; your job is to just listen and not react. It may seem awkward at first, but it usually deepens the learning opportunities for the discussants and the presenter.

**4. The presenter responds to clarifying, versus leading, questions from the group.** A clarifying question is one you don't already know the answer to. For example: "Has this ever happened to you before?" A leading question is one where you are trying to suggest a solution. For example: "Have you ever tried using a logic model to solve this problem?"

**5. The group talks about the dilemma among themselves**, without the presenter's facilitation or participation, based on their own experiences with similar dilemmas. What have they done in similar situations? The presenter of the dilemma does not participate in the conversation but records what is said.

**6. After the time period allotted, the presenter shares observations about the group's comments**, only in terms of what stood out as food for thought. The point is not to give gold stars or rate comments for good or poor feedback.

**7. If there is time, someone else presents and you do the whole thing again.**

Assign an observer and a timekeeper to the group. The observer can lead a conversation about what it felt like to consult to the dilemma and what everyone learned from the process. The timekeeper can help the group respect the time boundaries for the activity.

Having difficulty getting people to volunteer to be the dilemma presenter? As an alternative to starting with a peer consult focused on one person, Ryan Chao from the Annie E. Casey Foundation reports that his program team builds readings and reports into ongoing meetings to lift up issues that will stimulate requests for peer consultations around dilemmas.

## Peers Don't Let Peers Dive Alone

As a reflection *in* action, when a group is stuck, you might introduce the metaphor of an iceberg for exploration of what is happening in the moment. There is the 20 percent that is visible above the waterline and the 80 percent that is just as real but hidden from sight. All events—conversations, meetings, even email exchanges—are like icebergs: **There is what you see and there is what is going on beneath the surface.** If you are paying attention only to what is happening above the surface, you miss the vast and rich data that is undergirding the action and likely to interfere (think Titanic) with getting to your destination.

### Waterline Work

Invite the group to answer a few questions about what is taking place beneath the surface of the meeting.

Put the answers up on a flip chart. Look for patterns and discuss what you might do to address what is beneath the surface to move forward. Or, you can use images to "put something in the middle" of the dialogue to explore responses to the questions.

? What are you thinking but not saying?

? What are you observing?

? Are there ways that this conversation is pinching you?

? In what ways is our culture at play in this conversation?

? How are values at play or in conflict in this conversation?

## Why Philanthropy Practitioners Enlist Their Peers

**Everyone learns.** Presenting a dilemma is a great learning experience. Participants say that consulting to someone else's dilemma is a reflective practice on its own! The idea is not to be the expert with the answer. You help by sharing your experience with similar situations and what you learned from them. That requires vulnerability and disclosure of your own imperfections. In addition, you try to be a generative thinker—building off of each other's thoughts. Like the Xerox technicians at the watercooler, by exploring each other's ideas—rather than making one-off speeches—more learning takes place for everyone.

**Relationships deepen.** Investing in peers over time can lead to new and valuable relationships. We asked a group of executives who meet to share experiences whether relationships changed through the peer dilemmas. A colleague told us this story: "People think I am joking but I am not—the peer cohort on diversity, equity and inclusion has allowed me to have truly honest, trusting and meaningful relationships with two white men. I don't think people with privilege fully appreciate how hard it is to peel away decades of negative experiences I had with white men. By being able to witness their honesty and vulnerability, I was able, over time, to hold less and less back. This only happened because we were all willing to commit to a full day, four times a year, to sit with each other and reflect on the many challenges we face as diverse leaders and people. And the result for me is two important allies and a renewed sense of optimism in the world (sometimes)!"

**Assumptions and beliefs are clarified.** Peer consults often uncover an unexamined assumption that is undermining a strategy. One of our colleagues used a consult to explore how to raise with his board some of the tensions he felt were coming from the unexamined privilege of being a private organization for public good. "I have noticed a real reluctance by our board to be very public about the work we fund because they want to stay humble and private. But I also know it would help our grantees if we were more open about our point of view. It's a privilege to be able to stay quiet because you don't have to worry about being called out. I used reflective practices—conversations with colleagues and peer consultations—to more fully understand the issue and my own reluctance to raise it.

> ***"By stepping back and opening up to myself and others I respect, I deepened my insight into why this issue troubled me and developed strategies for how to be true to myself and my point of view."***
> *—A Philanthropy Northwest colleague*

Peer consults gave one practitioner "the space and time to share my fears about being a stronger advocate for diversity, equity and inclusion with my board. By sitting with peers who had common experiences as well as those who had more supportive environments, I gained the courage to share how important this work is to me as a woman of color. I don't say this lightly. There was even a moment when I felt that I could have lost my job for speaking my truth. By revealing my authentic self in a way I never had done before, I was not only successful in starting conversations about equity and inclusion among the board members, but most importantly, I also became more comfortable sharing my own vulnerabilities with my board."

Doug Stamm, the Meyer Memorial Trust CEO, was part of Philanthropy Northwest's first cohort of executives to meet on leading diversity, equity and inclusion strategies at their foundations. They used a peer consult framework at their meetings and once the program ended, the cohort decided to continue as an informal network available to consult to personal and professional dilemmas.

> ***"You can have coaches and consultants, but I do think a peer cohort with a diverse mix of leaders of color, sexual orientation and stage of organizational development is extremely powerful."***
> *—Doug Stamm*

Several practitioners we've interviewed are part of peer cohorts that have evolved over time. What they have in common is a focus on the *how* of their work. They meet a few times a year and for some groups, they've agreed to be available for peer consults whenever needed. Rob Kaufold, CEO of the Hemera Foundation, is part of an informal family foundation group that formed after working on a few projects together. They meet monthly for peer consults via video since they are spread across the country.

## Alone With Your Dilemma?

When you don't have access to a standing group for a peer consult, try this reflective practice of writing about a dilemma using the Left-Hand Column Exercise. The basic premise, adopted from Chris Argyris and Don Schön in *The Fifth Discipline Fieldbook* by Peter Senge, is that during a dialogue, two different conversations are actually taking place. One conversation—the right-hand column—is explicit. It consists of the words actually spoken throughout the exchange between two or more persons. The other conversation consists of what you are thinking and feeling but not saying.

TRY THIS

### Left-Hand Column Exercise

**First**, write about the incident using the same questions from the peer consult: What were you trying to accomplish? How did you go about it? What was frustrating for you?

**Then** take another piece of paper and fold it in half, lengthwise, so you have two columns. Pick an actual exchange at a critical or most frustrating moment in the conversation as if you were going to film it. In the right-hand column, write out the dialogue as best you remember it.

**Now**, try writing your own reflections on the dialogue in the left column, using these questions as prompts:

- What didn't I say?
- What assumptions am I making about the other person or people?
- What led me to think and feel this way?
- What was I feeling?
- How might my comments have contributed to the difficulties?
- What could I have said differently?

The emphasis is on your responses because there is no way to know what the other person is thinking or feeling without asking them! Revealing your own blind spots and unspoken reactions sheds light on your contribution to the frustration and what you might do differently in that situation or another one like it.

# What's Your Practice?

*Expanding Your Reflective Practice Repertoire*

**Our hunch is that you've used reflective practices already, even if you don't call them that. Every day you find ways to span gaps between the *what* and the *how* of your work, between your technical knowledge and your self-in-action knowledge.**

As you make building these mental bridges a practice, you become curious about what might make them wider and sturdier or how you might use them with fellow practitioners. We want to encourage you to explore what you do now and what other practices you want to construct for yourself.

Investing in reflective practices at work can feel counterintuitive at first. "This is new to me," says Edgar Villanueva of the Schott Foundation. "I'm wired to be a producer, to get things done and not enjoy the journey. It always felt like a luxury to sit around and reflect when there was so much to get done.

> ***Taking the time to pause, to explore my purpose, learn from the wisdom of others, and reconnect to my culture, has increased my appreciation for reflection. Being reflective starts with me individually and now that I am trying to create more space for myself to be reflective, I hope that I can also create more space in the organizations I'm a part of."*** *—Edgar Villanueva*

In this section of the guide, we provide three exercises you can use to develop your reflective practices. They are designed so that you can do them on your own or as a group within your foundation, with grantees or other partners. You'll discover, as we did, that there is a lot of practical wisdom in every room.

EXERCISE 1

## Get Your Feet Wet

Do a quick scan of the 4 core methods in the guide to assess what practices you already use and ones you'd like to acquire. Note questions you have about any practice and develop a plan to answer them. You might pick a "Try This" exercise from the guide or use a resource in the appendix to help you learn more tied to your questions.

If you do this as a team, make a composite of what you do and don't do now. How do the dominant practices influence your work? How about the practices that are not as strong? How do they affect your work? You might try the guide exercises *together with* an underused practice.

| **Practices From the Guide** | **Questions and Next Steps** |
|---|---|
| *Discover Your Role* | |
| A. Constructing Roles to Match Situations | |
| B. Bringing/Managing Myself in Roles | |
| *Let the Right Brain In* | |
| A. Use of Poetry | |
| B. Use of Images | |
| C. Use of Stories | |
| *Practice Presence* | |
| A. Manage Your Pinches | |
| B. Lean Into Consultative Stances | |
| C. Cultivate a Contemplative Practice | |
| *Enlist Peers* | |
| A. Use Peer Consults | |
| B. Left-Hand Column | |
| C. What's Under the Waterline | |

EXERCISE 2

## What's Your Reflective Practice Before, During or After Action?

We've been asking practitioners what they do to learn from their experiences. Share this list with your colleagues after you add your own quote to the practices you do, and circle the ones you would like to see more of in yourself.

| Reflection Before Action | Reflection In Action | Reflection After Action |
|---|---|---|
| Prep by clarifying my intentions: *"I journal to get clear about my goals so I can be explicit about them in action. And to be accountable …"* | Listen to my body and keep an eye on my behaviors: *"I watch for and manage my 'triggers'—anger, frustration, shutting down, having to talk, etc."* | Use peer consults: *"Write up and present my dilemma to colleagues to get more clarity by listening to their thoughts without reacting."* |
| Put a pin in reactions: *"When drafting an email that may ruffle feathers, I hold it in my draft folder for a day or two and make sure I still feel it is what I want to say before sending."* | Go to the balcony for a different perspective: *"When I feel like a lot is happening at once, I take a mental snapshot of the moment and ask, what am I noticing in the picture?"* | Dedicate time for thinking: *"Practice end-of-week reflection activity—write down experiences and conversations I had, people I met."* |
| Change the venue: *"I suggest we take a walk to have a conversation or have meetings in different environments out of the office."* | Press the pause button: *"I'll say, 'Hang on, I want to sit with this for a moment.'"* | Build in time for reflection in general: *"Mandatory 30 minutes of reading articles to get my head away from day-to-day grind."* |
| Check-ins: *"I always ask groups to take a moment to reflect on their current state to get ready for being fully present at the meeting."* | Invite collaborative reflection: *"I suggest we take 5 minutes at the end of the meeting to ask ourselves: What happened? So what? and Now what?"* | Checkouts: *"I ask my team to take 5 minutes at the end of a meeting to reflect on actions that took place—process- and contentwise—to make sure we look for what is happening beneath the waterline."* |
| | Move into curiosity/inquiry: *"I try to get curious instead of frustrated with upsets and disruptions."* | |
| **Your practices here:** | **Your practices here:** | **Your practices here:** |
| ______________________ | ______________________ | ______________________ |
| ______________________ | ______________________ | ______________________ |
| ______________________ | ______________________ | ______________________ |
| ______________________ | ______________________ | ______________________ |
| ______________________ | ______________________ | ______________________ |

EXERCISE 3

## Do a Deeper Dive

At the beginning or end of a meeting with your colleagues, grantees and other partners, take 15 minutes to answer one or more of these questions to open up a deeper conversation about reflective practices for the *how* of your work.

### In the Beginning

When you first started this job, what object or image would describe the *how* of your work versus the *what* of your work?

- Instead of an object, you could invite everyone to create metaphors: When I started, I was to my foundation as X is to Y; I was to myself as X is to Y and I was to people in the field as X is to Y.
- Where are you now?
- Where would you like to be?

### Your Hero

Who is your reflective practice hero? Why? What would you like to emulate in your own work?

### One Challenge

What is one challenge you face that your training hasn't prepared you for? What is one reflective practice that might help you work through it?

### Useful Experiences

What experiences (training, on the job, lived, etc.) helped you develop ways to reflect on your practice?

### Assigning Value

In what recent situation has reflective practice proved its return on investment?

### My Go-To

What's your top personal way of reflecting? How has it helped you in philanthropy? Or has it?

### Aha Moment

What was the formative event that made you realize that reflective practice was important?

### Comfort Zone

Are you open or private about reflecting on your practice and why?

### Team Tally

Does your team have a reflective practice mindset? What is it? If not, what are some ideas about how you might introduce reflective practice for your team? Could you imagine suggesting some of the practices in this guide with your own team?

### Culture Check

Does your organization build reflective practices into meetings, feedback and evaluation? How do you imagine your organization might be different if reflective practice was more readily practiced?

### Inside Out

What would it look like if philanthropy embraced reflective practices? For you? For your particular field? For grantees?

## Appendix: Resources

| Practices From the Guide | Resources |
|---|---|
| **Discover Your Role** | Jaffe, J. & Ryan, B. (2005). *Personal Strategy: Mobilizing Your Self for Effective Grant Making.* GrantCraft. http://www.grantcraft.org/assets/content/resources/personalstrategy.pdf. |
| Mobilizing and Managing Self in Role | The Arbinger Institute (2010). *Leadership and Self-Deception.* Berrett-Koehler Publishers.<br>Hirshhorn, L. (1990). *The Workplace Within.* Reprint edition, The MIT Press.<br>Heifetz, R.A. (1998). *Leadership Without Easy Answers.* Harvard University Press. |
| **Put Something in the Middle** | Palus, C.J., & McGuire, J.B. (2015). "Mediated Dialogue in Action Research." In: *The SAGE Handbook of Action Research.* 3rd edition, pp. 691-699. |
| Use of Poetry | Various contributors (March 2017). "Use Poetry as a Reflective Practice." In: *Philanthropy's Reflective Practice.* www.reflectivepractices.org. |
| Use of Images | Visual Explorer™ cards from Center for Creative Leadership. https://solutions.ccl.org/Visual_Explorer_Playing_Card_Facilitators_Set. |
| Use of Stories | Heath, C. & Heath, D. (2007). *Made to Stick.* 1st edition, Random House. |
| **Practice Presence** | Kahn, W. (April 1, 1992). "To Be Fully There: Psychological presence at work." *Human Relations.* Volume 45, issue 4, pp. 321-349. |
| Pay Attention to Pinches | Olivier, M.A. "Do You Know These Three Different Parts of Your Brain?" *Learning as Leadership.* http://learnaslead.com/do-you-know-these-three-different-parts-of-your-brain/.<br>Torbert, W.R. (1976). *Creating a Community of Inquiry: Conflict, Collaboration, Transformation.* John Wiley and Sons. |
| Lean Into Consultative Stances | Pogue White, K., Ph.D. (March 20, 2014). "The Consultative Stance." The Annie E. Casey Foundation. https://www.youtube.com/watch?v=jjAbcsZOnXk. |
| Cultivate a Contemplative Practice | Magee, R. (May 19, 2015). "How Mindfulness Can Defeat Racial Bias." Huffington Post. https://www.huffingtonpost.com/2015/05/19/mindfulness-race_n_7310156.html.<br>Bush, M. (2012, September). "The Work of Compassionate Action." http://transform.transformativechange.org/2012/09/.<br>Goleman, D. and Davidson, R.J. (2017). *Altered Traits: Science Reveals How Meditation Changes Your Mind, Brain and Body.* Avery.<br>Kabat-Zinn, J. (1994). *Where Ever You Go There You Are.* 1st edition, Hachette Books. |
| **Enlist Peers** | Brown, J.S. Various articles. Johnseelybrown.com. |
| Left-Hand Column | Argyris, C. and Schön, D.A. (1974). *Theory in Practice.* Jossey-Boss. |

Where can you **learn more** about reflective practices

**Action Design**
actiondesign.com

**Cambridge Leadership Associates (CLA) Adaptive Leadership**
cambridge-leadership.com/adaptive-leadership

**Center for Contemplative Mind in Society**
contemplativemind.org

**Heart of Philanthropy**
couragerenewal.org/heart-of-philanthropy-2016

**Interaction Institute for Social Change**
interactioninstitute.org

**Learning as Leadership**
learnaslead.com

**Liberating Structures**
liberatingstructures.com

**Power + Systems**
powerandsystems.com

**Rockwood Leadership Institute**
rockwoodleadership.org

**James P. Shannon Leadership Institute**
wilder.org/Community-Leadership/James-P-Shannon-Leadership-Institute

**Thousand Currents Academy**
thousandcurrents.org/academy

## Did you find your practice here?

We've chosen to highlight four reflective practices. There are many more than that. Our goal was to publish what we've heard so far and to stimulate more conversations for a second volume. We'd like to hear more about your practice. Please contact us at jan@reflectivepractices.org and be sure to check out www.reflectivepractices.org.

# Why Reflective Practices for Philanthropy?

## What could be more important?

If we believe that philanthropy was not designed to be an ATM for social change, then let's invest in all its nonfinancial resources, including people and organizational structure, for greatest return. It means improving skills of all staff to be the best partners possible in our fast-changing, hard-to-understand, roiling environments. It means baking these same practices into organizational structures from meetings to performance appraisals. It means supporting the same learning for grantees. Or even better, doing it together!

## What could be harder?

We have myriad ways to resist reflective practices as a valuable tool for ourselves and our partners. Philanthropy is understandably fueled by "the urgency of now" to get to results for the fields and communities we want to support. Taking the time to reflect on our actions can feel like a suspect luxury rather than a vital necessity. Plus, there is the worry that this kind of pause and inquiry translates into "no one here knows what to do." Finally, we face a learning edge in philanthropy when it comes to how we invest in staff and board capacity as well as that of our partners. It's new territory.

## What could be better?

The benefits of having reflective practices far outweigh the costs. Practitioners report that their practices are a form of continuous learning and growth on the job. They report spending less time returning to repair damaged relationships and strategies and more time for equitable, inclusive thinking with partners when it's needed the most. For newcomers, reflective practices tap into a language that is already in them and everyone around them. It can be easily taught and sustained.

Use this guide to learn about four reflective practices and start a conversation about how to bring reflective practices into your own organization.

Philanthropy's Reflective Practices is a project of The Giving Practice, the national consulting firm of Philanthropy Northwest. Our purpose is to help you build what you bring to the work.