



THE WHITMAN INSTITUTE

August 2014 Newsletter

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TWI Welcomes Pia Infante As Co-Executive Director

by Jill Blair

Dear Colleagues,

It is with great pleasure that we welcome Pia Infante to her new role at The Whitman Institute as Co-Executive Director.

As you may know, several years ago, we announced our intention to close our doors in the year 2022 in order to accelerate the pace and increase our financial capacity to influence the field of philanthropy. Our ambition over the next 8 years is to encourage others across the field of philanthropy to explicitly support relationships, dialogue, connections and collaboration – to invest in these processes because we believe so strongly that they are the essential ingredients of the hard wiring that is necessary for any successful undertaking.

Our intention by the time we spend out our resources is that we have contributed mightily to a thriving network of institutions, individuals and communities that place the highest priority on supporting this inner wiring – across all issues and approaches.

At our board's last retreat in the fall of 2013, we came to realize that in order to achieve



Pia Infante

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our lofty aspirations, we needed more internal capacity – more staff; but not just any staff would do. The talent we required was within our sight – it was Pia – Pia who has been a true partner to John for a decade – Pia who has consistently shown up despite other professional and personal responsibilities – to plan and lead our amazing TWI retreats and to inform our board’s thinking and strategic direction. Pia has helped bring TWI to where we are today and so we could not be happier than to have this opportunity to invite Pia to serve with John as his co-Executive Director – to lead us forward with the same spirit, courage and integrity we have come to know, to value and to admire. With John and Pia at our helm, everything is possible.

In the spirit of making this road by walking, the board is also committed to making the way forward together with you and now with our two brave and capable leaders.

Sincerely,

Jill Blair and the TWI Board of Trustees



It feels like the curtain is rising on Act III. I am excited and energized. And that’s a good feeling for someone who’s been here since 1988.



Sue Ellen McCann

The Curtain’s Rising on Act III

by John Esterle



Lately, I’ve been thinking about TWI in terms of a three-act play.

Act I began with TWI’s founding in 1985 and ended with the death of our founder, Fred Whitman, in 2004. Act II was the rebirth of TWI and a decade of transformation. Now, with Pia Infante joining me as Co-Executive Director, new trustees coming on board, and a 2022 sunset date on the horizon, it feels like the curtain is rising on Act III. I am excited and energized. And that’s a good feeling for someone who’s been here since 1988.

Our newsletter covers these recent leadership changes, while also highlighting two program developments – our Fall Retreat last October and the Grantee Perception Report we commissioned from the Center for Effective Philanthropy – that strongly informed our thinking about the road ahead.

Recent developments have also had us been thinking about the road we’ve traveled.

June was Sue Ellen McCann’s last board meeting after 10 years of service and longtime Chair Jill Blair’s final board meeting was our early August board retreat. Both played foundational roles in “Act II” and I am deeply grateful to them for their friendship, their trust, and the many ways they have supported TWI – and me -- over the years. I’m glad Jill’s voice and spirit feature prominently in this edition; they’re indicative of the depth of



Of course, TWI's advocacy rests on the impact of the people and processes we are advocating for. So, how do we capture the impact of dialogue, relationship building and the connections they generate? How do we concretely convey the value of multi-year, unrestricted funding? How do we make a compelling case for trust-centered philanthropy without jettisoning measures of accountability and impact?

her contributions and leadership for the last 8 years. We treasure all she has brought, and will continue to offer, TWI.

With transitions, of course, come new opportunities. We are delighted to welcome CJ Callen as our new Board Chair and look forward to what she will bring to this new role. As you'll see from her reflection on our Fall Retreat, we are continuing the tradition of Chairs who are provocative writers!

You'll also be introduced to three dynamic additions to our board. Charles Ugalde started last September and has quickly proven himself an invaluable member of our team, including the way he has embraced his role as Treasurer. Jamie Allison and Shannon Farley just participated in their first meeting and the way they jumped right in only confirmed how honored we are by their commitment to TWI and how enthusiastic we are about what they will contribute.

In looking at the words I've just written in regards to past and present board members, I note trust and friendship; spirit, voice and leadership; contributions and commitment. Not to mention dynamic, thoughtful and invaluable. All these words come to mind when I think of Pia and our work together over the last decade. She is indeed a treasured member of TWI and I am thrilled on a lot of levels that she is now here full-time, as Co-Executive Director.

We are also indebted to all of our grantees that participated in CEP's Grantee Perception Report last year. Their feedback was both tremendously affirming and helpful and played a significant part in our internal deliberations. With Pia co-leading we are now able to really start moving on what we heard from this process.

One theme that came through loud and clear from the Grantee Perception Report was people wanting us to advocate within philanthropy for what and how we fund; they urged us to tell our story and to help tell the stories of those we support. We are taking that charge seriously and aim to show you how in the months and years ahead.

Of course, TWI's advocacy rests on the impact of the people and processes we are advocating for. So, how do we capture the impact of dialogue, relationship building and the connections they generate? How do we concretely convey the value of multi-year, unrestricted funding? How do we make a compelling case for trust-centered philanthropy without jettisoning measures of accountability and impact?

These are big and challenging questions. But by increasing our internal capacity, by working interdependently and collaboratively with our grantees and funder allies, and by taking creative risks, we are humbly confident that we can effectively address them.

I, for one, am excited to see what TWI's third Act unveils, and hope that you'll join us in moving boldly forward, together.

Greater Than the Sum of Our Parts

by Pia Infante



I am deeply honored and delighted to join TWI as Co-Executive Director. I am even more humbled to get to partner more with John - whose kindness, integrity, intelligence, authenticity, and humor continue to teach and inspire me daily.

Frankly, we hope that my coming on as Co-Executive Director translates to $1 + 1 = 3$. The idea isn't for John and I to split the previous E.D. role but to live into a creative Co-Leadership structure based on our strengths. Of course, John and I have lots of practice, but I am excited to experiment with leveraging more than the sum of our parts, especially as we remain pretty lean staff wise.

There are those in our network already pioneering multi-gender, multi-racial, multi-generational Co-Leadership that we will lean on for modeling and support - particularly Luz and Dan at **The Right Question Institute** and Sean and Frances at **Building Movement Project**.

In the month and a half since I started, the nation has again erupted (or perhaps simply continued) a simmering public conversation on racism, disproportionate violence ending the lives of black citizens, the militarism of poor communities, and the historical, social and economic conditions that create the complex context in which these events unfold:

While it is encouraging that there are so many discursive channels through which to engage — from Huff Post pieces like this **one** on how necessary it is that the internet remain free from privatization to Twitter conversations at #ferguson #blacklivesmatter to Facebook shares of Melissa Harris Perry's searing **tribute** to the lost lives of unarmed black men — it is discouraging that so much of what passes for dialogue (e.g. in the comments sections) involves no discernable practice of listening or openness to relating across difference.

I've been thinking about the internet algorithms that track what I click on or like and populate my "newsfeed" with information that singularly reflects my worldview without interruption. It seems to mirror what the norm is nationally — live completely sealed in a universe of one's own choosing, and avoid anything or anyone that doesn't already see how we see.

How do we reach beyond our common choirs, past rigidness and fear of the Other, and into a future that truly demonstrates our interdependence with each other, the environment, and technology?

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FERGUSON, MO/USA - AUGUST 15, 2014: Crowd reacts at the Site of Quick Trip after Police Chief Thomas Jackson release of the name of the officer that shot Michael Brown.

I guess, despite my fatigue that institutional policies and behaviors have not transformed between the unnecessary early deaths of Oscar Grant and Michael Brown, I still have hope. It's that hope that calls me to this post — the aspiration that we can lift up the value of resourcing relationship and trust building, dialogue, and generative problem solving to bridge divides and create solutions, together.

John often emphasizes that it is both how we fund AND what we fund that matters. It matters to us that through our dialogue and relationship building lens we are

funding advocacy for unjustly criminalized communities, micro-democracy, leadership development for social movement and community leaders, truth telling and storytelling that honors the best of cross-perspective journalism vs. sensationalism, media advocacy, people and process oriented experiments that set out to embolden and support new approaches to generations-long problems, and practitioners doing the work through partnerships of equity and respect.

With these partners and approaches in mind, we are setting out on a path to host conversations and launch strategies to turn the dial in philanthropy towards trust and equity. Here's a preview:

Salons

- We are going to experiment with hosting smaller, in person gatherings with grantees and funders and mixed groupings. We know how valuable in person, experiential convening is, and we want to provide more face time between our retreats. In fact, we are holding a Salon on ***The Role of Trust in Our Work*** on September 18th, 2014 from 4-6 p.m. at our offices (405 Davis Court, #301, SF, CA 94111). All are welcome - please RSVP **here** by September 8th.



Join Us for A Salon on
***The Role of Trust
 In Our Work***
 Thursday, September
 18th, 2014, 4-6 p.m.
 @ TWI Offices.
 Wine and Cheese
 and Conversation.
 Please RSVP **here**.

We hope that by finding new ways to lift up the stories of triumph and sometimes failure of our grantees and ourselves, we can amplify the positive social impact that this approach already demonstrates.

Every movement needs a story.



From Active Voice and World Cafe's collaborative project *American Revolutionary: The Evolution of Grace Lee Boggs*



Steered By Our Partners

- Earlier this year, we convened a Steering Committee that includes some of our core grantee partners. The purpose of the Steering Committee is two-fold: 1) to create a collective inquiry process that helps us concretely capture the important role dialogue and relationship building play in our grantees' work, and 2) to help us design experiments that make the connection between trust centered philanthropy and positive social impact. We see our grantees as key advisors in our attempt to "show not tell" that what and how we fund connects to tangible benefits for all involved – including us.

A New Website. Finally.

- Yes, we've heard you loud and clear. The TWI website, loaded with some great content, needs a total overhaul. And we're knee deep in a redesign! We've partnered with Poles Apart Design and plan to unveil a much more interactive and fresh site in early October.

Lifting Up Grantee Stories

- As we've said many times, your success is our success. We hope that by finding new ways to lift up the stories of triumph and sometimes failure of our grantees and ourselves, we can amplify the positive social impact that this approach already demonstrates. One way we can do this through our new online platforms is sharing the media and resources emerging from our grantee network. Another way is by conducting interviews that make explicit the ways in which a trust centered approach is vital to our grantees' success and our own.

Deepening and Widening Our Funder Friend Network

- We also intend to increase our connections with kindred funders and those who may be attracted to the notion of trust centered philanthropy. We recently did a quick mapping of our current funder friends and discovered that there are a number of funders who share our values and may become closer allies in our efforts to influence other funders, particularly small to mid-size foundations in this way.

Not all of the ways in which these explorations will unfold are totally clear at this point, but we have some small and big bets in the works.

What is heartening and inspiring is that we are not alone in these ambitions, and that it is baked into our approach to be interconnected and interwoven with many others, including you.

Abrazos and Adelante!

Pia



We concluded that our greatest gift is our gift of practice – it is how we go about the work that distinguishes us from many though not all others in the field of philanthropy. We invest in the process of creating connections – relationships that enable dialogue and evolution – communication and contacts and networks that sum to a whole far greater than their parts

A Letter From Jill

by Jill Blair



Over the past year – since having moved back from Seattle to California, I have found myself in a place of deep reflection. This has led me to a most important decision – the decision to resign from the board of The Whitman Institute.

Throughout my life I have invited transitions and embraced change – in 2006 we moved from the East Bay to Seattle; in 2007 we sold our Berkeley-based consulting firm (BTW – informing change); in 2010 we moved to Jerusalem for a year; and in 2013 we moved back to California where the sun does always shine. Change has never been hard for me.

Over the last eight years, through all of these transitions, my relationship with John Esterle and TWI has been a constant. I have loved both since the moment I met them. John is the most gentle of souls – an angel on earth – exuding kindness and caring – compassion and love. Our meeting was serendipitous – Mark Gerzon is responsible – unwittingly so. That is a story for another time. But by our meeting, I became attached to John and to the Institute he was in the process of reshaping. And reshape he did. With his own vision, the Institute has grown to be an organization full of love and open-space – compassion – and true connection. For the past 8+ years I have had the extraordinary privilege of leading its board.

Over the last few years we have worked with great consciousness to consider how best to use the resources of the Institute to make a meaningful difference in the world. We concluded that our greatest gift is our gift of practice – it is how we go about the work that distinguishes us from many though not all others in the field of philanthropy. We invest in the process of creating connections – relationships that enable dialogue and evolution – communication and contacts and networks that sum to a whole far greater than their parts. We do this because we have the deepest commitment to the power of people – people who are open and aware – people who are connected to other people. With this clarity of purpose and contribution the board agreed to a spend-out plan that would allow us to increase our level of giving with the intention of more quickly and more effectively expressing our message and promoting our practice.

The decision to spend-out/down the Institute's assets has given us a sense of urgency and with that a heightened responsibility. We recognized in this process the value of recruiting new and next generational leadership. And so – this past fall, we invited Pia Infante to serve as our Co-Executive Director

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with John, and we began to recruit new board members to join our effort. Our board recruitment process led to the finest of candidates and our selection of Charles Ugalde, Jamie Allison Hope, and Shannon Farley to join the board this year (more about them in the next article).

I could not be more proud than I am today as I consider all that we have done so far and all that we are set to do. This leads me to my final reflection –it is time to move on. With the energy and vision of new leadership and the positional power and influence that TWI has begun to achieve in the field of philanthropy I feel certain that my contribution is complete. I will always remain attached and committed to the Institute but now from the proud perch of emeritus. My heart is full of gratitude as I prepare for this next transition.

Warmly,

Jill

Welcoming Our New Board Members

by Pia Infante



We bid a fond farewell off the board to **Sue Ellen McCann** and **Jill Blair**, whose many years of service have been invaluable and moved us in countless ways. This also brings us the opportunity to highlight our newest members.

We are thrilled to welcome **Jamie Allison Hope** and **Shannon Farley**, our two newest trustees, who joined us this past July.

They are now in the wonderful company of **Charles Ugalde**, who joined the TWI Board of Trustees in September of 2013.



Jamie Allison-Hope

JAMIE ALLISON-HOPE has worked extensively in philanthropy and in both the public and private sectors conducting research and managing a variety of programs. She is currently the Senior Program Officer at the S.H. Cowell Foundation where she is responsible for the foundation's grantmaking in youth development, affordable housing, and leadership development. She also manages the Foundation's Mission-Related Investment loan portfolio.

Jamie considers civic engagement a lifestyle choice and has a deep commitment to service. She has been a visiting lecturer on philanthropy, non-profit governance and social enterprise at UC Berkeley, Mills College and the University of San Francisco. She was appointed by San Francisco Mayor Ed Lee to serve on the Citizens' Committee for Community Development and she is a current board member for CUSO International, an international development organization that places volunteers all over the world. Jamie also serves on the Super Bowl 50 Legacy Fund Advisory Council. Her service has been recognized with awards from the Francisco Board of Supervisors and National Philanthropy Day.

Jamie graduated with Highest Honors from the University of Tennessee where she earned Bachelors degrees in: Political Science: International Relations; Spanish; Economics; and Humanities. She also holds a Master's degree in Public Policy from the Goldman School at UC Berkeley.



Shannon Farley

SHANNON FARLEY is an experienced social entrepreneur. Shannon is co-founder and Executive Director of Fast Forward, the only accelerator exclusively for tech nonprofits. Fast Forward provides financial and human capital to help scale technology solutions geared to solving some of the world's toughest problems for which there is no market solution. She was the founding Executive Director of Spark, the world's largest network of Millennial philanthropists. Prior to joining Spark, Shannon co-founded The W. Haywood Burns Institute, a MacArthur Award-winning juvenile justice reform organization. Shannon holds a BA in American Studies from Georgetown University and an MS in Gender and Social Policy from the London School of Economics.



Charles Ugalde

CHARLES UGALDE has a diverse, cross-sector background with a wide-set of experiences from direct services and fundraising to strategic grant making. He worked as a public benefits advocate for Legal Assistance for Seniors and a Supervisor's Assistant for an Alameda County Supervisor. At United Way of the Bay Area, Charles executed strategic grant making that funded youth development programs, small business development for immigrant communities, and nonprofit capacity building projects. As a Development Director for The RYSE Center, Charles collaborated with the executive team to set the vision and approach to fundraising. He served as a former board member for On The Move and sat on the Bay Area local steering committee for Emerging Practitioners in Philanthropy. Recently completing his MBA from The George Washington University, Charles is pursuing a career in marketing and consumer research. When he isn't spending time with family and friends, he's enjoying all the good eats the Bay Area has to offer.



A simple retreat can also be an amazing philanthropic vehicle for building community around a shared idea; in our case, that idea – that beacon – is the primacy of relationships. No need to get fussy with a model that has such intrinsic value.

A Look Back at TWI Retreat 2013: The Weekend When Time Stood Still

By CJ Callen



At one board meeting of ours we found ourselves in true TWI fashion talking about things in interesting ways. “Maybe we shouldn’t call it a retreat?” That question prompted a conversation and in the end, the consensus was that the word “retreat” was indeed appropriate for our gathering of grantees, board and like-hearted funders. A retreat is about stepping back in order to move forward. That was the spirit in which I participated in my third TWI retreat from October 2 to 4th, 2013 at Chaminade in Santa Cruz. The first TWI retreat I attended, I was one of only 35 people. The one after that we dared to double our numbers. In 2013 we made the bold move to host 100 people who are part of our growing network.

When asked to reflect upon that retreat held nearly a year ago, I thought I might not have much to say because its effects have retreated to the recesses of my brain. To the contrary, reflecting back on my weekend of reflection brought up too many things to share! And so I will limit myself to four things.



We need
to be more
intentional
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Size matters but is not determinative. Honestly, I was one of those who struggled with the size of the group and had difficulty making the connections that I had in past retreats. Others thrived in the environment. Perhaps it was especially easy for those who had no point of reference – there was no past to romanticize or cling to. One lesson we learned as a foundation that will help us design future retreats for large groups is that we need to be more intentional about creating an environment where connections can flourish. By offering a little more in the way of structured networking, we might be able to even the playing field for introverts in the group like me!

Never underestimate the beauty and power of simplicity. TWI provided retreat-goers with a simple gift of a warm and welcoming place to restore their souls sans expectations or ambitious goals. We provided good food because food is a powerful tool for connecting people. Retreats don't need to be complicated and over structured. A simple retreat can also be an amazing philanthropic vehicle for building community around a shared idea; in our case, that idea – that beacon - is the primacy of relationships. No need to get fussy with a model that has such intrinsic value.

I am a believer
in moderation
in all things
and I suppose
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humility as well

Let the timeless be in charge of the time. Although TWI is on track to spending down its endowment, during the retreat I was struck by a feeling of timelessness. Rather than feeling weighted down by a clock ticking down on our lifespan, I was able to embrace the beauty of the moment, of people coming together and the many possibilities represented by a gathering of the like-hearted. As I watched all the smiling faces soak in the time spent in the comfort of community, I felt love surrounding me. The event unfolded effortlessly, and I had been granted a great gift of seeing the power of TWI's mission in action. I felt that what we seeded would continue long after we are gone, and so what's all the fuss about formal ending in 2022? As TWI moves into its third act, I will carry with me the face, voices and memories of the 2013 retreat. Our efforts to place relationship at the center bore fruit. We cannot do this work without our grantee and foundation partners and it was great to give them this simple gift. For me as a trustee who was part of the decision to spend down, I found that time stood still for a little while as the retreat did its magic: planting seeds of inspiration and renewal.

An "Aha" Moment About Humility. Toward the end of the retreat, I participated in a small group discussion about how TWI should approach the spending down of our endowment by 2022. Not surprising to me, our community of supporters and grantees want us to influence other funders. What I did not expect was that they were concerned. They appreciated the quiet and thoughtful way that we went about our business. However, they thought that perhaps we were too humble.

Humility and philanthropy are rarely spoken in the same sentence; hubris and philanthropy are linked more often than I care to admit. I am proud of the way our foundation works without big ego. Humility is aligned with the primacy we place on mutually respectful relationships.

I am a believer in moderation in all things and I suppose that goes for humility as well.

As a foundation with a big idea, we were challenged by our partners to balance our humility with the confidence that we have a powerful and effective model to share. We have since then decided to be more intentional in bringing our gifts to the field because they matter - and have the power to transform by elevating the transformational over the transactional in ways that create greater impact.

TWI's Grantee Perception Report

By John Esterle

We also took to heart a message that came through strongly: TWI should explore how to share its model and approach more broadly within philanthropy.

We decided in early 2013 that a good first step on our path to sunset-ting was to test our assumptions about our work and approach and to do so in a way that placed our performance within a broader philanthropic context. With those aims in mind, we chose to work with The Center for Effective Philanthropy and to use their Grantee Perception Report (link: <http://www.effectivephilanthropy.org/assessment-tools/gpr-apr/>)



to assess how we were doing -- both individually and in relation to the over 300 foundations who have used the GPR.

The GPR proved to be an extremely valuable assessment tool for us. It not only gave us insight into our strengths and opportunities for development, it provided actionable data that has concretely informed

staffing and program decisions (e.g. bringing Pia on as Co-E.D., revamping our website and communications approach, creating a grantee assessment/storytelling steering committee). If you read **CEP's summary of the key findings of our GPR**, I think you'll see what I mean.

Using a comparative survey was much more useful than an individual survey would have been as it enabled us to benchmark our performance against other foundations. The standardized questionnaire, however, also meant that parts of the survey didn't apply to us, specifically around proposals and reports. Consequently, just the question framework itself informed us about how different our approach is from most foundations.

The positive feedback we did receive from the GPR about our grantmaking approach, our relationships with our grantees, and the support we provide beyond the check was deeply gratifying and affirming. We also took to heart a message that came through strongly: TWI should explore how to share its model and approach more broadly within philanthropy



The foundational importance of trust in our work -- what we have started referring to as “trust-centered philanthropy” -- is something we’re increasingly talking about with a range of people who also aspire to helping shift philanthropic practice.



Other important feedback concerned TWI’s decision to spend out. People were clear about our intention, but unsure what that choice meant for them in terms of funding. Since the beginning of the year we have been in numerous conversations that have made things clearer to the survey participants. Some of these involved us recommitting with multi-year support to a core group of organizations. Those were “good news” conversations. Others were harder as we informed people we were making transitional grants or not renewing funding. That kind of news is always difficult to give but of course not nearly as difficult to hear.

In all of these different discussions we clarified our general portfolio strategy going forward: the bulk of our funds remain committed to multi-year, unrestricted funding with a smaller portion available for targeted annual grants. We will have more detailed information about current grants -- and the reasoning behind them -- when our new website goes up in October.

A final theme I wanted to raise up was that of trust. CEP’s summary report notes, “Grantees frequently mention the perceived trust of TWI in their organization’s ability to carry out its mission.” The foundational importance of trust in our work -- what we have started referring to as “trust-centered philanthropy” -- is something we’re increasingly talking about with a range of people who also aspire to helping shift philanthropic practice.

Shifting philanthropic practice is a recurring theme at TWI’s retreats and it came up strongly on the final day of our fall retreat when Austin Long from CEP did a wonderful job presenting the survey results to our gathering. I was struck by what a lively and energizing discussion the GRP findings generated and the depth of feeling so many in the room brought to talking about TWI. You can read Austin’s account here: <http://www.effectivephilanthropy.org/inviting-grantees-to-the-table/>

It’s easy – and I dare say understandable – to be skeptical of the ability of philanthropy writ large to change. Many hold that position pretty firmly and I myself have doubts about TWI’s aspirations to spark fundamental change in terms of how funders approach their grant making and their relationships with the people they support.

But then I think of the voices from our grantees that came through so powerfully through the GPR. I think about the daily struggles they face and about what a grind the field’s status quo approach to funding is. I think about them not only urging us to be an advocate and storyteller but also asking us how they can help. I think about our interdependent missions and how we can learn from and support each other.

And my doubt turns to resolve, my skepticism turns to faith, and change indeed seems possible – even if it’s on the horizon.



The Whitman Institute was established in the early 1980's as an instrument of Fred Whitman's imagination and intellectual curiosity. Deeply attendant to issues of the mind – the process of critical thought – the balance between feeling and thinking.

The Path From There to Here

By Jill Blair

On August 1st and 2nd the TWI Board met for a retreat – a time to reflect and prepare for change – to enable dialogue, to generate deeper understanding of one another and to create connections to strengthen TWI's work in the world. The start of this experience was a journey guided by John to the roots of The Whitman Institute – the creation story. At first glance this exercise might have looked similar to other timeline projects - a giant roadmap posted on the wall – pictures and words depicting key organizational events. But as the story unfolded, as is always true for TWI, there are a few distinguishing qualities worth sharing.

The Whitman Institute was established in the early 1980's we were told as an instrument of Fred Whitman's imagination and intellectual curiosity. Deeply attendant to issues of the mind – Fred wondered about the process of critical thought – the balance between feeling and thinking – the relationship between the left brain function known for logic and the right brain function known for emotionality and creativity.

The Institute served as the platform for Fred's exploration. He was able to have papers commissioned, research organized and interviews conducted – all centered on questions of critical thought and quality decision-making. How, he pondered, can one sustain critical thinking skills during periods and events of profound emotional stress? Fred's quest for insight was personal. He suffered bouts of boundless emotion – dark and deep – depressed and even paranoid. With knowledge perhaps Fred thought he could find peace.

As the board stood captivated by this story, John went on and shared how and when he joined the Institute and the work he managed in the process. He and others organized Fred's thinking and questions and connected both to the field of philanthropy. Long departed staff member, Deanne Stone, took the lead in bringing focus to the dynamics of family foundations and family philanthropy and the work that John encouraged and guided was groundbreaking then and still relevant now. John was looking at the balance between heart and mind through the lens of trust and connection. By the time Fred died in 2004 John was the Executive Director of TWI. He began to shift the Institute's emphasis from self-supporting research (internally focused) to grantmaking (externally focused). He began to reframe the

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fundamental question from one of how to maintain rational thought to: How best to bring the heart and mind into fair balance in order to cultivate relationships that promote positive social problem-solving and meaningful social progress?

By the time the creation story came to a close, I had a few realizations of my own –

1. A timeline without a storyteller is nothing more than a calendar. John and Pia brought the TWI story alive not just by the showing of it but by the sharing of it – and through our engagement we were able to see the role that people and circumstances play in bringing the past into the present and their potential influence for the future. This reflection exercise was entirely dynamic – it was a conversation and a shared exploration. I will never look at a timeline exercise the same again.
2. That TWI is continuing on the path laid at its creation – encouraging questions and attending to both the heart and the mind in its work – but perhaps its greatest contribution to the field of philanthropy is the approach that John has crafted and by which he leads – with trust. TWI is a vocal advocate for trust-based or trust-centered philanthropy in which those who have the resources to give are in deep and respectful partnership with those who have the skills and knowledge to do. TWI invests in and calls out for cultivating the connections and building the relationships that are the foundation of every great endeavor.

The story of TWI is not Fred Whitman's story in which John Esterle plays a role. It is John Esterle's story to which Fred Whitman made an important contribution.

