

## **Between the real and the ideal:**

### **A meditation on the future of ethical reflection for philanthropic fundraisers**

“What we have loved, others will love, and we will teach them how.”

(William Wordsworth, *The Prelude*)

When I was asked to reflect on the future of ethics for philanthropic fundraisers, my first thought was of how daunting an assignment this seemed. Surely in our fast-paced, increasingly complex 21<sup>st</sup> century professional lives, fundraisers have only begun to scratch the surface of the ethical challenges and opportunities that will accompany new technology, increasing pressure to raise more and more philanthropic dollars, diverse and new strategies to do our work, and heightened public scrutiny of our efforts.

But then I was reminded of a lesson I learned well from my friend and colleague, Robert Payton – former college president, corporate foundation president, director of the Center on Philanthropy, and professor to all of us who study and care about philanthropic studies. The lesson always began with Bob reaching into his wallet and presenting “the card” for you to see.

Bob’s card had three lists on it:

- The seven deadly sins: pride, lust, gluttony, sloth, envy, covetousness, and anger;
- The cardinal and theological virtues: prudence, justice, fortitude, and temperance; along with faith, hope, and love; and,
- Gandhi’s “seven deadly blunders,” which include (among others): wealth without work, knowledge without character, and politics without pride.

The lists illustrate a couple of ideas that are crucial to ethical reflection. First, the classic virtues and vices remind us that there is great wonder in human experience. As fundraisers, we are guilty time and time again of having a limited perspective on our moral

lives. We tend to focus only on the current ethical dilemma, forgetting that ethics also is about the values and commitments that make our work possible. Too often, we lack the imagination needed to see beyond the techniques of our work, beyond the dollars we raise, beyond the structures of our organizations. We easily lose sight of the wonder of the philanthropic covenant, the process of promise-making and promise-keeping that is at the core of a vital, healthy human relationship. Bob's lists are full of ethical promise and intrigue. We could use some promise and intrigue in our fundraising.

Second, the lists also challenge us to think about the common history we share as human beings. Bob's lists are primarily from Western sources. Your lists may come from different experiences. The point is that the values and commitments reflected in our lists remind us that an essential part of the human experience is our striving to find the common in what we feel, what we value, what we care about, what we seek to make real and genuine in our world. Contemporary Americans spend much more time worrying about differences and individual rights and personal opinion than they do about the common good, the body politic, and public conversation.

Think about how often you or I or our colleagues engage each other in genuine conversation about the common values that ground our work. We have codes of ethics, we have certification processes, we have research and curriculum and education, but do we have genuine conversations with the public we hope to serve and with the other participants in the philanthropic process? Those conversations are important, and too often overlooked, parts of our ethical reflection.

Bob Payton keeps that card of lists in his wallet and shares it with his friends and colleagues and students because he knows that we are not in this alone, and that we do not

need to reinvent the wheel when it comes to ethical reflection--but that we do need to know our history and be willing to talk about it! (Pribbenow, 1997)

That, then, is how I understand what is important about the future of ethical reflection for fundraisers. The poet, William Wordsworth, tells us that “What we have loved, others will love, and we will teach them how.” I find this story about the “lists” particularly instructive because the fact is, that no matter the specific ethical challenges and opportunities we may face in our professional work, we have what we love – these rich and remarkable resources at our disposal – to help each other learn how to reflect ethically. Our challenge is to recognize and make those resources available for ourselves and our colleagues.

I am not naïve about the complexity of the ethical issues we will face as fundraisers in the future. Surely this volume offers all of us a healthy dose of reality about the sorts of ethical challenges and opportunities we will face in the years ahead. But if we focus only on the dilemmas we may face as we pursue our professional work, we may miss the many sources of guidance and inspiration that come from the ages.

This is particularly important because of the tension we all know in our work as fundraisers (and by extension for all professions) between our ideals and the reality of daily experience. The question that professions in the American context have faced time and again in their evolution is the tension between the social compact for professions, the ideal aspirations of professional work, and the economic and expertise side of professions, the reality of life in the trenches. As professionals, our ethical reflection and decision-making must explore and address both the ideal and the real (Pribbenow, 1999).

I think this tension between real and ideal is important on many levels, but in particular because it has genuine implications for our ethics and our moral decisions. Simply

put, a focus on bold ideals often leaves us with vacuous principles untethered to the reality of our daily work, while a focus on the cold technique and “dull” work of fundraising leads to a set of transactional rules and guidelines, devoid of a sense of context, often interpreted simply as an easy application of the code to ethical dilemmas. We will not resolve this tension but we must understand it and look for ways to develop a framework for the ethics of philanthropic fundraising that links the real and ideal in an integrated whole – allowing the tension, if you will, to define our character and our actions. That, it seems to me, is at the heart of the future of ethical reflection for our profession.

In this way, philanthropic fundraising is by no means unique among American professions – the tension between the social compact and technical expertise is at the heart of the professional adventure in our society, but fundraising may have an advantage because of its relative maturity (or lack thereof!) and the opportunity we all have to get it right!

What shall we do as a profession and as professionals to navigate the tension, to move toward an integrating framework for ethics in our profession? I want to suggest three linked themes that I believe may help us begin to define this framework and find the resources for our future ethical reflection.

The first theme is the most important because it situates the work of philanthropic fundraising in relation to its highest and noblest cause: philanthropy is a public practice in a healthy democracy. Philanthropy is the “impulse to generosity” at the heart of the American character (Gaudiani, 2003). Like other professions, our work is first and foremost possible because it serves the public trust, public needs, and public goods. This understanding of philanthropy raises up issues of loyalties and priorities in our lives in a way that I find provocative and intriguing. It also points to the sorts of roles we must play not only in

pursuit of our professional work, but in our need to be teachers and leaders in public discourse and in encouraging civic reflection.

This notion of philanthropy as a public practice also demands that we understand that philanthropy itself cannot be “ghettoized” in a sector. How we love each other (the literal meaning of philanthropy) takes many forms and demands ongoing refashioning. In this sense, I look to the metaphor of philanthropy as common, political work as the basis for sustaining an understanding of the public practice of philanthropy. The public practice of philanthropy will occur in various and evolving social arrangements, and our ethical reflection will need to be mindful of how those different structures and relationships continue to serve the public, common good (Pribbenow, 1998a).

The second theme of our moral framework is the notion of philanthropic fundraising as a vocation or calling. If we serve a public good, then we are all public servants. A vocation, as Frederick Buechner reminds us, is that place where our deep gladness intersects with the world’s deep need (Buechner, 1993). The ethical implications of this notion are significant because it points to our character (as a profession and as professionals) and the need to think as much about virtues and vices as we do about rules and consequences. Too much of professional ethics today is driven by responses to ethical dilemmas rather than deliberation about the sort of people we are, the character we exhibit and practice. Ethics is about much more than the problems we face; it also is about the riches of human life and experience. As professionals, we need to embrace moral reflection about the good we accomplish in our work and how that good is linked to the sorts of people we want to be.

This notion of profession as calling also lifts up interesting issues about how our professional calling fits with the mission of the organizations we serve. There needs to be an

ongoing dialogue between personal calling and institutional values, looking for ways in which professional commitments and values are honored in organizational mission and practices. This, it seems to me, is the proper understanding of the work of stewardship (Pribbenow, 1998b)!

The final theme then directs our attention to how ethics and ethical decision-making must be reflective practice. If we have this larger framework for our work, we are pushed beyond the transactional and dilemma-oriented focus of a technical approach toward a genuine dialogue between theory and practice, between character and rules, between social and historical context and the circumstances of our daily work, between the ideal and the real. It is helpful in this regard to recall another lesson from Bob Payton: the need for all of us to articulate our philanthropic autobiography, linking moral reflection to our own life experiences!

There are several important components to this understanding of ethics as reflective practice. First, ethical decision-making must be conversational and dialogic. For example, University of Dayton professor Marilyn Fischer's decision-making framework for fundraising ethics demands that we consider public, organizational, professional and personal perspectives on a given situation (Fischer, 2000). The work of Independent Sector also is helpful as organizations develop more deliberative processes for ethical decision-making, becoming more reflective as practitioners within organizations (Independent Sector, 2004).

Second, we also must see how our work is educational and pedagogical. University of San Francisco professor Michael O'Neill is right to challenge us with the notion of fundraisers as moral teachers – teachers about values within our organizations, with donors, and in the wider public (O'Neill, 1994).

Here, then, is a renewed challenge to all of us to refine a framework for thinking anew about ethics in our profession. We have the opportunity to model for the rest of society how a profession can integrate the ideal and real in its self-understanding and ethics, and in that way point to our critical role in sustaining American democracy--any citizen's highest calling!

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