

A SPIRITUALITY OF FUNDRAISING: FOR THOSE WHO GIVE & RAISE FUNDS

OCTOBER 25, 2023

Karen Pascal: Hello and welcome to this Henry Nouwen Society Online event. I'm Karen Pascal, the Executive Director of the Henry Nouwen Society, and we want to welcome you to a conversation with experts who bring together an intersection of spirituality and fundraising. *A Spirituality of Fundraising* was first a talk, which Henry Nouwen gave. Then Upper Room Ministries developed it into a booklet, and that booklet has gone right around the world. More recently, Nathan Ball upgraded it and expanded it, and now we call it *A Spirituality of Fundraising, the Workbook Edition*. It's been a vital tool for both fundraisers and philanthropists. It's so practical and really encouraging. We are hoping that this session is going to whet your appetite for a five part series we are offering in February, 2024. This five part series, *A Spirituality of Fundraising*, is going to bring together experts who truly understand the way spirituality is essential in fundraising. First, I want to introduce you to Dr. Wendy VanderWal Martin. Wendy is our Director of Development at the Henry Nouwen Society. She's going to help us navigate the conversations today. I hope you're going to find this session both inspiring and encouraging.

Wendy VanderWal Martin: Welcome friends. Welcome to *A Spirituality of Fundraising* by Henry Nouwen. We have a wonderful group of presenters today who are going to give you rich insight and gems of wisdom. I'm so glad you've decided to join us today. Our first guest is Brian Bachand. He's the founder of Evolution. Evolution. I'll let him tell you a bit more about what that is, but I just know that Brian, who I've been working with and just enjoying getting to know, is going to share some wonderful wisdom and practical tips with you. Welcome, Brian.

Brian Bachand: Wendy, it's so great to be here with you today. Thanks so much for the invitation.

Wendy VanderWal Martin: Brian, tell us how you encountered Henri Nouwen and *A Spirituality of Fundraising*, and what impact did it have on you?

Brian Bachand: Well, I was first introduced to Henri Nouwen's work when I was in the seminary. I had, after university and undergrad, I went to the seminary to study to become a Catholic priest. And I was in the seminary for five years, and that was the first time that I ever was introduced to Henri's work. And I just remember having a beautiful connection with his words. And it was just something that was, you know, really, it was very human, but it was a connection with the divine, with ease. That's how I kind of felt Henri's work connect with me. And then after being a priest for eight years, I freely resigned and went on to bring my gifts to the world in a new way. And I ended in New York City in the world of philanthropy. That was my first job. And it was interesting because I raised millions, worked with teams, and I didn't realize that I was kind of using a lot of the principles of Henri's *Spirituality of Fundraising* until many, many, many years later when I discovered his book, the *Spirituality of Fundraising*.

And it was such a gift because it was very affirming that what I had done had always been still part of a mission. As Henri says, it, it really is something that is just as important as going to see those who were sick in the hospital, you know, caring for those in need. Fundraising is a ministry, and it was also a real gift of aligning in a beautiful way that fundraising now is evolving and changing for organizations to bring that higher consciousness into the world with a mission and with clarity. And Henri's definitely has been a beacon, and I think what he spoke about in *A Spirituality of Fundraising* many years ago is more relevant now than ever.

Wendy VanderWal Martin: Now you were a priest and now you're someone doing this high level work with organizations. What ways have you grown spiritually, perhaps since leaving the priesthood and doing this work? How has it actually impacted your own spiritual journey?

Brian Bachand: I love that question. And I think that is, you know, at the heart of who I am, that, you know, when I went into the world of fundraising, especially in New York City, my first job was with the American Cancer Society on 32nd Street on the corporate side. So obviously being at the heart of, you know, Manhattan, a very aggressive, you know, city on the corporate side of fundraising, I just remember going into meetings and going to meet with donors, and not just a sense to just get the ask and the deal done, which was, there was a lot of pressure of, you know, to do that, **but** to make that connection, to connect on the human level. And I just remember that by doing that, meetings changed. Going in to have a beautiful conversation. But it didn't mean you didn't have to prepare. Didn't mean you didn't have to have all the right data, but going in to connect from the heart and it would change. And I found that all of a sudden on my team, I was the one that was closing the most deals. I was the one that things were moving forward. And I really give that witness because it really came from a moment of faith. I was there to share the vision, to invite people into that, and to realize that no matter how gorgeous the boardroom that I was sitting in, or what room I was in speaking with them, it was a reason. And it was an opportunity and an invitation to invite someone into something deeper. And so for me, it had definitely become a deepening of my faith, of listening to my intuition of, you know, when all the data was saying, these are the people we need to speak to. I just remember getting little prompts in my mind, thinking like, "Huh, I think we need to talk to this person, and I'm just going to follow that." And listening to those whispers of the faith whispers of truth led me to connect with people that the data sometimes would say not to. And so for me, it has just been a deepening to where I'm at now, to help organizations to unblock. There's a lot of blockage in the world of fundraising, and it really comes down to the, to the inner world, the fear that people have and asking it can be the sense of not having the clarity of your vision, of not taking action and really realizing that it's not a transaction, it is a transformation that you're seeking. So my spirituality has been one that has really influenced that. But I would say at the heart of it all, it's about connecting and connecting from the heart.

Wendy VanderWal Martin: If you could name one spiritual practice that would impact that relationship between philanthropy and fundraising, or to make it more personal between the philanthropist and the fundraiser, what spiritual practice would you identify as being just critical to really being able to stay awake and alert, alive to that ministry of presence you were just describing?

Brian Bachand: Actually, it goes back to what you just said about the ministry of presence, because it is your presence that is the power. And I'm not saying power in an arrogant way or that, you know, you're coming into a meeting, but your presence is what creates the energy and the opportunity. I often, and I said this just recently to a team, I said, if you go into a meeting to meet with a philanthropist to meet with someone, and you're doing all the talking, and you're sitting there blabbing along and talking about the program and talking about what you need: if you talk, you block. If you talk, you block. Because the role of the fundraiser of going in to meet with someone is to listen, is to have the ability to be that spiritual catalyst, to ask questions, to open up to how the mission connects.

And I'm not saying it's always easy. There's nothing worse when you go into a meeting and someone is just so guarded, or they just have this deadpan look. But if you're going in with the only intention to have a beautiful conversation, to connect, I promise you that you will walk out of that meeting with an awareness of connecting either with the donor, either more deeply with yourself or, or listening to what's going on. And it really is the most powerful aspect. So I would say definitely going in with the presence of preparation, and it's a spiritual practice, and it's very easy, and it's something I do. And I meet with donors even virtually or in person or whatever, I actually, before I go in to meet with them, I visualize speaking with them. And I do not go in with a set agenda. Now, I certainly am going in there to navigate and see where things are at, but if I go in with an energy of like, "Oh, I've gotta get this, I gotta get this major gift, they've gotta close the donor agreement" I'll always lose. I'm blocking. And if you go in with that practice of preparation of being open to bring that light, that's where transformation takes place. That's where the ministry is. Because oftentimes when you go in with that way, it will be the philanthropist that will say, well, here's what I want to do. This is what I want to take. You don't even have to go into the ask. So it's a very beautiful, simple, spiritual visual practice that can transform a meeting with ease and peace and create something beyond your wildest imagination.

Wendy VanderWal Martin: You make it sound so easy, Brian, but what you're describing is a very mature spiritual path. And so I'm thinking now of, of maybe a younger fundraiser, someone who's just starting out, and as you alluded to, and we both know, anxiety can be a real distraction in this art of being fully present. What would you say to that young fundraiser who truly wants to be in the space you describe, offering that ministry of presence, a non-anxious presence. How have you done that, Brian?

Brian Bachand: You know, I think it's so beautiful. One of the things I've always, always loved is when I was leading teams, especially when there were younger individuals on the team that were starting their career, and I can certainly relate, there's nothing more intimidating when you go into a meeting and, and you know, you don't feel prepared. You know, "What question are they going to ask? What if they want this? Why do we do this?" You know? And, and there's nothing worse if you're working in an environment where it's almost like, you know, you didn't catch something today, like you went out to catch fish and you came home with an empty bucket. So there's that anxiety that people have. Like, I want to prove myself to my boss that I'm worthy, that I've, I've delivered. So that's very natural. I think that's just first of all, just to recognize, okay, that's, that's what it is.

But I think the most important way to begin is to realize that you are there for a reason. So if you immediately can say, there's a reason I was, you know, I was hired as the coordinator, there's a reason why I am here. And it's not just about the job description, it's about the gifts that I bring internally to who I am. And just to realize that, you know, there's a reason why you're there and to connect to that daily, nurturing that in whatever way that you do that in your spiritual practice. But two, one of the best ways to develop that skill of how to engage with someone is to practice that intentionally with your friends. You know, if you go out and you're, let's say you've been having dinner with someone, you know, practice asking questions. They don't need to know that you're practicing. Practice, asking them questions, seeing how they respond, and also being comfortable with the pauses, not trying to fill it.

We do that so often, especially now, we want to keep filling up the space. So practicing with people that you know and you're comfortable with, and it's not all the stakes on the line about getting the gift or getting the meeting in and reporting back. That helps you build that confidence. And I think the other

third way that I would say is definitely it's important to work with a mentor or someone on your team that, that you feel comfortable with. And sometimes you have to ask and say, "Gee, I would love to go with you to a couple donor meetings, just to really be, be there, be present. You know, maybe I can speak about one aspect and see how they engage." That's a powerful way to learn. It doesn't mean you have to imitate them or become them, but it will help infuse within you your gifts of how to engage and listening to conversations. And I, and that's something I certainly did. There were some people that I worked with that, they just had like golden throats. When they would speak, they would just ooze out these words. I would see donors just kind of melt in front of them. And I remember just saying to them, "You know, can I go with you for a couple meetings?" And it really did help build my confidence, and it helped also tap into aspects within myself that when I met with donors, it would help me, you know, if there was a conversation that came up, or if there was a long pause or they seemed disengaged. Oh, I remember so and so, you know, once did this. And it really helped a lot.

Wendy VanderWal Martin: Who knew that asking questions of your friends at dinner would almost be a form of prayer, because really, people are trying to learn how to practice a ministry of presence. We're just so grateful that you were here today with us, and also that we'll be able to, to pick your brain and hear your heart even more fully for our February series. So thank you so much, Brian, for being with us.

Brian Bachand: It's a real pleasure. I look so forward to being with you and to everyone who is going to be participating, thanks so much.

Wendy VanderWal Martin: Our next guest is a long time friend of mine, and so it's just with a lot of joy that I get to introduce to you, Dr. Mark Peterson, who is the founder of Stronger Philanthropy. Mark, welcome. I'm so looking forward to our conversation together.

Mark Petersen: Thanks for having me here today.

Wendy VanderWal Martin: Now, Mark, you've also written a book, *Love Giving Well*, and you've made the connection between pilgrimage and philanthropy. So tell us a little bit about how pilgrimage has been so core to your spiritual journey and how you bring those insights and, and that experience into your work connecting fundraising and philanthropy. What role did pilgrimage have in all of that?

Mark Petersen: Pilgrimage is a good metaphor because it helps us understand that it's about the journey, not necessarily about the destination. We care about where we're going, but it's about how we do things that matters as well. And so maybe it's just bringing those things into a little bit more balance, that I think is important in, in doing philanthropy. Well, I came to this realization. It kind of occurred to me while I was actually literally doing a pilgrimage in Spain. When I walked the Camino de Santiago. And as I was walking and seeing the similarities between my work in philanthropy and then the actual journey on the Camino, I just began making those comparisons. And out of that, the book has come. So when you're walking a physical pilgrimage, you're walking with just your backpack. You have just what you need and no more. You don't want to carry extra stuff. So you simplify and you pare things down. You also don't necessarily know where you're going to sleep that night or where you're going to eat your dinner. But these things are provided along the way. And so there's a real learning to trust as you're walking a pilgrimage. The other thing that I really think happens during a pilgrimage, especially in Spain,

on the Camino, is a sense of community develops. So you end up walking with other people, people that you wouldn't have planned to walk with, happen to be walking at the same pace as you. And you end up eating meals together, sleeping in the same hostels together. And you can come from very different places, different countries, different languages, and yet you become community with one another. And so I found that in doing philanthropy, there's a similar kind of community that's developing as we drop the barriers and, and take risks at having a relationship, when we get out of our comfort zone and come face to face with the need. And a philanthropist, I think, can really be blessed by taking those risks and entering into a deeper relationship and a deeper opportunity to, to discover more about themselves and how they can play a role in the change that needs to happen - but also that they themselves can be transformed through these relationships that are developing. So it becomes a very mutually beneficial relationship. It's not a one-way check writing exercise where the charity asks for money and then receives a check. And then the philanthropists, that's all they do is write checks. No, it's about entering into community with one another.

Wendy VanderWal Martin: I wonder if you can tell us a bit about in your day-to-day life, what are some of the spiritual practices that that give you the, the spiritual capacity and strength - all these years working in philanthropy?

Mark Petersen: There are a number of spiritual practices, and I think that maybe I would start with my pilgrimages. Those have been the time away that have been renewing and helpful to me and just doing a reset every summer. But I, I strive to have a faith where I'm able to go to mass every day, go to daily mass and just encounter Christ in the Eucharist and have that reset every day. So I was even told one time that when we go up and receive the Eucharist in the church, that that walk from your pew up the middle aisle is a pilgrimage. It's a Camino. And so many times when I'm going up to receive Christ in the Eucharist, I'm thinking, this is my Camino today. You know, this is my time. When I'm recalibrating. I'm coming to face-to-face with Christ and receiving his grace and receiving what he has for me for the day ahead. That's a spiritual practice. But I would say there's other spiritual practices as well that I'd like to highlight. Because, though they might not be known as spiritual practices. But let me talk about patience as a spiritual practice. I think many times for philanthropists, there is an impatience. We want to see action, we want to see results, we want to see change. But the causes we all care about really will take a generation to fulfill. Change takes time. We need to cultivate patience and a willingness to not rush to, you know, expectations that are too grandiose. We're walking together with the charity in any endeavor that they're doing. So let's have patience.

Another practice I want to highlight that maybe is not known as a spiritual practice, but the practice of collaboration. I think for many philanthropists, there's a temptation to think we can do things in isolation. And that through our check that we're writing, that that's the way that we're contributing. But collaboration requires both parties. And more than the two, but as the community of people around the mission. To understand each other, understand the gifts that each one is bringing. It's not just about the money. It's about those that are implementing, those who are leading these organizations, those who are frontline workers. Everybody's important. Everybody's needed. And so understanding that collaboration is important. Also, collaborating, not just with the charity and its employees or its people, but collaborating with other philanthropists. You know we can't think that as a philanthropist, we can do things in isolation from each other. We can learn best practices from other people that are giving as well.

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And so I try to develop relationships with other philanthropists as well as with charity leaders to walk together.

Wendy VanderWal Martin: I was just reminded about how important the Eucharist was to Henri Nouwen. Wherever he went, he established, of course, the practice of daily Eucharist. Even including when he would visit his father in the Netherlands, and he and his father would, experience the Eucharist together. What a beautiful image. If you could choose one spiritual practice that would impact the relationship between funders and those who are raising funds, how would you describe that within the relationship? How can we ensure that the things Henri spoke about so deeply and well, vulnerability and connection and community... What spiritual practice will take us into that place where we really see each other as partners, and we build trust and, and we're there for each other as to together we resource the work that God has called us to co-create with the spirit of God?

Mark Petersen: What I would say to that question is that very often we rush to judgment. And I think what we need to develop is to practice discernment. Not rush to judge people, not rush to judge organizations or causes, not discarding opportunities that are coming in front of us as philanthropists immediately, but taking time and giving room. I can't describe how many times in my career I've gone into a meeting or I've gone, I've read an application and I know inside me, I'm judging. I'm making a critical decision on an organization on maybe the way they approach me. If I give it time, if I just calm down a bit and give it time, I find that sometimes my attitudes will change. And when I judge too quickly, I'm not cultivating the discerning voice of the spirit in me.

Wendy VanderWal Martin: Henri Nouwen spoke about moving from the house of fear to the house of love. And it seems to me that that shift is just such a critical aspect of the relationship between those who are giving and those who are raising funds. That we really operate from that place of being grounded in our own belovedness. And out of that springs a non anxiousness in which we can really be present with one another, hear one another, and discern. And then even if the response is no, that no comes in the context of having listened deeply and listened to God together. Mark, I'm so grateful you've been here for this conversation, and I can't wait for the longer conversation we'll have together in February. Thanks again, Mark.

Mark Petersen: Thanks for having me today.

Wendy VanderWal Martin: I'd like to welcome Rose Feerick. Rose is the founder and co-director of Wisdom and Money, and has more than 20 years experience working in this arena of spirituality and finances. I'm so thrilled you're here with us today, Rose. Welcome.

Rose Feerick: Thank you.

Wendy VanderWal Martin: I wonder if we could begin with you sharing about how you first encountered Henri Nouwen's *A Spirituality of Fundraising*. It has quite a history for you and for the organization that you now lead.

Rose Feerick: Thank you. I have it right here. I started working with Wisdom and Money's predecessor organization called Harvest Time in 2003, so 20 years ago this fall. And that organization was founded by

a gentleman whose name was Don McLennan. Don knew of Henri Nouwen's work, was a friend of the Henri Nouwen Society. And when I first started working with Harvest Time at the time he handed me a book, *Spirituality of Fundraising*, and encouraged me to read it. So very early on, I was introduced to first Henri Nouwen's work, and then this particular little booklet. So that was really right at the beginning of my time in this arena.

Wendy VanderWal Martin: How have you grown in your own spirituality in this arena of raising and giving funds? What are some of the postures or practices that have become most meaningful for you in really maintaining a healthy place of grounding?

Rose Feerick: That's a great question. First off, I want to say in Henri Nouwen's little pamphlet here that many of us have read, he articulates just a beautiful vision for how we want to go about our fundraising. And so much of it resonates with what we're up to at Wisdom and Money. Especially early on in the pamphlet, he talks about, really orienting from vision. And that's one of the first things I would say is part of a practice that I have. Which is that if I'm going to enter into a fundraising conversation with someone, the first question that I'll ask myself is really, "What is it that we are trying to do in Wisdom and Money? What is it I'm inviting people to be a part of?" It's very simple to say that, but in the actual practice of fundraising, I notice that some other energies can come into play.

For example, I might feel some financial pressure as a director of an organization as I am watching our cash flow. So if the cash flow starts to be tight, I might feel the pressure, and I want to ask from a place of need or urgency. That's a real sensation that I have from time to time. But 20 years in this work with a vision like what Henri now is articulating, I have to remind myself, "Okay, so here's where I am. I'm feeling urgency, or I'm feeling stress, or I'm feeling the need." But actually that's not the place to ask for funds from. Much more helpful if I can say, "Here is the vision, here is what our work is all about. This is what we're trying to create in the world, and this is what I'm inviting you to be a part of." It's a very different energy.

Now what do I do when I'm in that place of stress or anxiety or urgency? That for me, I've come to see as a call to prayer, really. So I, for example, if I'm up in the night thinking about money, it happens. Perhaps some of the folks who are watching this will know that sensation. I'll feel the stress and what I have learned 20 years in, if I have that sensation in the middle of the night, that's a good time to go to prayer. So I have a little prayer corner in my room, and I might literally just like put something on that, in that sacred space just as a reminder that really, "God, I'm asking you to help us to find the people who also want to be part of creating this vision." And then I'll just really do some sort of prayer of letting it go and inviting in the support of God.

So if I have that experience of stress, anxiety, if those human emotions are present, my 20 year practice has been to learn to see those as a call to prayer. So that's like an actual thing that I do, particularly for those tense moments.

But then when I'm talking to people in our network, what I want to do is say, "This is what we are about. This is what we're trying to create. This is what I'm inviting you to be a part of." So that's the starting with vision. It's not a problem for me to say, "Here's what our current needs are." So if we do have needs, if there is a low cash flow, something like that happening, it's not a problem to be transparent about it.

And we do share that information. The key for me is about being very mindful of the energy or the place from which I'm inviting people to join us.

So starting from vision, working with anxiety or stress or pressure as an invitation into prayer, spiritual practice, and sharing transparently what our needs are. Those are some of the foundational practices that I have used in my work.

I would say another one is, and this is a, a humbling one. It's really honoring people's clear "yes's" and "no's". So what happens if somebody, if I say, "Here's what Wisdom and Money is doing, here's what we're looking to create in 2024" and they see our work, and it's just really clearly not the work they're meant to be a part of, part of the practice for me is to really say "thank you." So a clear "no" in that instance, is a gift. And learning to recognize that. Because the people I'm looking for are the people that God has already invited to be co-creators of this work with us. And so those are the clear "yes's." So honoring clear "yes's" and "no's." It's humbling because there's an element of just real trust involved that if somebody is like, "This isn't for me" we just thank them and let them find the place where they are meant to be giving to. So those are a few of the things hopefully that gives a little taste of what we're up to at Wisdom and Money when it comes to fundraising,

Wendy VanderWal Martin: Clearly you have been on this journey for some time, and so these rhythms and practices are a part of you. I wonder about the person who might be watching this, who's just, if they were honest, they know they're, they're at an empty well kind of place. And so those rhythms have been disrupted for any variety of reasons, right? Stress, busyness, fatigue, et cetera. How would you invite someone in that place of dryness of, "this is the work that I have to do, this is my paycheck, this is what I am I'm doing for perhaps a mission and a vision that I deeply love, but, but I'm feeling the grind of it."? What kind of invitation would you offer? Where would you invite them to hit pause and reset in again, picking up those rhythms of spiritual practice?

Rose Feerick: So in Wisdom and Money, our practices that we ground our work in are contemplative spiritual practices, centering prayer, Lectio Divina, sacred chant. Those are practices that we use in all aspects of our work. So when I say moving towards prayer, I mean, literally. My conversations with God are pretty raw. You know, "Okay, I'm at the end of my rope. I know what we're trying to do. I know what our vision is. I know the value of this work. And I have no idea how to proceed, or I just don't have the energy today." For somebody who's grounded in contemplative practice, that experience of emptiness is actually not a problem because a lot of the contemplative life is about surrendering into the place of emptiness with faith, that that's actually where God is. So what I know for myself, I'm somebody who works hard and I've always got a lot of things on my list to do. So if I do hit a point where I'm like, "Okay, I've done everything I know to do, and I am not really sure what the next step is" that's great moment of really opening to God. I hate to say it that way, but that is what it is. Because what I've just said is, "I have exhausted everything that Rose knows to do in all of her skills and all of that." So now I'm at a place where I don't know, a great opening for God. Now, that request to God in some ways is the starting point of putting out an invitation into our networks. Because it's like, "Okay, God, here's what I know we need between now and the end of the year. Here's the things I think I know of where these gifts might come, but here's the part I don't know."

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And for us as a small nonprofit, there's always like an aspect of our end of year fundraising where we're like, "We don't know where this is going to come from." And then I might just start by saying, "Okay, God, this is what we need. I'm not sure where it's coming from. I trust you to sort of give us inspiration of how we might share what our needs are. And I really trust you to work with the people in our network to know who wants to receive this invitation as good news." So that place of the tired, the empty, stressed, whatever it might be, my encouragement would be just bring that into some way into prayer, whatever that looks like for you first. Then after that, you might start to think about, "How do I then share what that need is with my community?"

So it's like grounding that need in that place of prayer. So in *Wisdom and Money*, when it comes to relationship with money we're very aware that inside of our own ordinary psychology as well as in our culture there's a lot of ways that money can get attached to pretty ordinary human emotions like fear or perhaps even pride or control, things like that. And the gift of the contemplative life is that it's actually working with those egoic programs to soften them and to drop our awareness into a different part of our being. And so that's another reason why I'm suggesting starting with prayer. Because if I'm coming into the activity of fundraising and I'm really caught up in some of my egoic just attachments or programs or just ways of being, through the practice of contemplative prayer over time, we actually learn how to drop into another aspect of my being, which is much more open, spacious. And that's the place we want to invite support from. So some of this is knowing where I am and also learning those practices. If I'm feeling stressed, what is the practice? What are the prayers that help me to drop back into a place of trust and open? That's where we issue the invitation from

Wendy VanderWal Martin: Your words, remind me of, of Henri teaching this rhythm that began with contemplation or solitude. Then moving to community and then to care. And Henri, in his typical honesty, would say he often wanted to do run to care - the work of ministry. And then if he was feeling overwhelmed, then he would go to community and say, "I can't do this alone." And then if he was really desperate, he would go to prayer. And, and of course he knew that we need to begin with solitude. We need to begin with contemplation and then build the relationships in community out of which the overflow then came in a form of care or ministry, whatever it is that we've been called to do. And so I wonder, Rose, if you can now bring us into the community aspect of *Wisdom and Money* and some of the ways that *Wisdom and Money* is building community to undergird that contemplative practice and ensure that we have a deeply healthy spirituality in this arena of raising and giving of funds.

Rose Feerick: Yes. Community in *Wisdom and Money*. Our work with money is not, does not just take place at the point of fundraising. It's really what we're doing everywhere. Whether it's how we run the organization or the retreats we offer, it's all about coming together with other people to talk about the connection between money and spirituality. Everything we do is about coming together in small circles. Usually our groups are small of people who become our spiritual friends with whom we can talk about money. I'm aware that, again, in the cultures that I'm familiar with, talking about money is often taboo. It might be something we do with our accountant or our financial advisor or attorney, our spouse but otherwise we really don't talk about it. It's something that is kept hidden. In *Wisdom and Money*, we break that taboo. We invite people to actually come together in a retreat context for that exact conversation.

Why? It's because, first of all, this is a really powerful spiritual practice. So just like all things having to do with spirituality, there's the work we might do on our own, on our prayer mat in our own room. And yet, so much of Christianity is about building the communities in which we support one another. In *Wisdom and Money*, we're doing that around relationship with money. So Henri's booklet on fundraising talks about the relationship with money being at the heart of fundraising as ministry, and in *Wisdom and Money* we see that relationship with money being a really critical work of our own working out of our own spiritual lives. So what does that look like? If you came to *Wisdom and Money*, we would invite you into retreat to really just talk about what comes up for you around money.

Our work is rooted in just compassionate understanding of you know, that just, there's a lot of stuff that comes up around money, whether it's giving, asking for money, our lifestyle, our savings, "How much do we hold onto, how much do we give, how much do we leave to our children?" All those kinds of questions. There's a way in which we can engage those questions intellectually, but for most people there's a lot of emotion involved. So part of what we're doing is building communities of people where we can talk about that stuff. And yet we are also people who are committed to the gospel. And so our question is how do we live out what we deeply believe when it comes to money now, especially when money is something that can be very charged emotionally or it can be tricky relationally.

So *Wisdom and Money* is doing that everywhere. Now. What does that look like when it comes to fundraising, to giving and receiving? Well, first off, at the staff level, those, that moment I was describing earlier where somebody might feel somebody who's about to get ready to go do some fundraising, might have some sensations of urgency or stress or something like that. Um, I mentioned that one of the things I would encourage people to do is to take that as a, as a invitation to prayer. But it's also a great place to reach out for a friend. So for example, if I'm noticing that I'm having a lot of that sensation coming up for me before I go talk to somebody around making a gift, um, I might reach out to one of my colleagues and say, I just need to check in, you know, because I know the place that we're committed to asking from.

And if I feel like I'm just not quite there, I have friends where we can just talk about it. "What is it that I'm experiencing?" Same thing for people who are in our network - I'm talking about people who are not necessarily staff members. One of the things that we do in *Wisdom and Money* during our end of year and mid-year fundraising times, when we share with people what our needs are in addition to one-on-one conversations and sending things out in the mail or the email, we also bring people together for a conversation. "What's it like to get this request? You know, what happens when you read a fundraising letter? How do you think about what to give, how much to give, to whom?" Many people get a lot of fundraising invitations. "How do you discern which ones to respond to?" So we actually create spaces for people to come together to have those conversations around *Wisdom and Money's* fundraising. So it's kind of an unusual fundraising technique, but the reason we do it is because we find actually that people really learn from one another. So first you get some support if there's any kind of anxious or I don't know, any kind of emotions going on that feel like they're not rooted in the heart. So there can be support to move through those places. But also people inspire each other. So even hearing what others are doing and how they think about it can just open my mind. It can just give me hope for the world to hear what people are doing and just the loveliness of people's hearts. So the work of coming together and community is, I just find around money is it's very juicy.

Wendy VanderWal Martin: Yes. You've just alluded to something that's a big part of the vision of this webinar and our upcoming series in February. And that is, "How do we practice a sense of allyship in the relationship between those who give and those who receive funds?" And this vision, that Henri really spoke about way back with a spirituality of fundraising, the relational element of all of this. If you could identify one practice that you think would really give legs to that sense of allyship between philanthropy and fundraising, you've alluded to some things already. How would you articulate that?

Rose Feerick: Yeah, when I think about my experience of Henri's vision in real life, I think about some of the people I've been walking with in the work of Wisdom and Money. And the reality is they are partners and friends. That's just what's true. And so when there's a conversation where my task is to share clearly what our needs are and they're discerning what might make sense for them... I just had a conversation like this the other day with somebody in our network. And the sensation is we are co-creating something. I'm saying, "Okay, here's what we're trying to do next year. Here's what we're seeing. What makes sense for you?" And they will share very transparently, "Here's what I'm working with, here's what I'm thinking." My point is, many years in relationship with some of the people in our network, those conversations are just... It's like when I'm in the kitchen with my sisters cooking dinner: "Okay, here's what I'm going to do..." And together we are putting something on the table. So that is what it feels like. So what's the practice? I think the practice is the practice of building relationships in Wisdom and Money. I don't really think of people in our community as donors, even though that is actually a function of what they might do. People might serve as donors. It's like I'm thinking of the people who I know who I know are very sincerely trying to discern what is theirs to do with money and they're my friends. So that's how I experience people. If I'm going to go into a conversation that is about a potential gift to Wisdom and Money, for instance, one thing I do, a practice that I do is, I take time before I get into that conversation to remember what I know about this person, to remember what I know about just the beauty of their spirit and what I know they care about - what I know they're trying to be about in the world.

Because that's the place we're looking for: where the vision of Wisdom and Money matches that person's vision. So I'm not trying to convince anybody of anything. I'm trying to help all of us to see, "Is there a place here where what you're trying to be about and what I'm trying to be about comes together." So the practice is to take the time before going into a call to really remember what I know about who this person is and what the nature of our relationship is. So it's in that context that I might share, "Here's where we need some support this year or next year", or "Here's this project we're really trying to do." Because there are some projects we're trying to do that I know whoever I'm speaking to might be really excited about. And then there's others where I know it's just not their thing. So it's that pause to take time to really remember what I know about who this person is and what they care about. That's a practice that I find really helpful for one-to-one conversations with people.

Wendy VanderWal Martin: I wonder what wisdom you would offer the fundraiser who's got a very clear job description, very clear, targets to meet, and is approaching people they don't know very well or who are brand new to the organization for which they're seeking to raise support. And that that relational energy isn't there yet, and that's a big part of their work. What wisdom would you give them to be able to take some of what you've been describing into that sort of context where they're trying to find new folks who will experience passion and connection with the vision. It's sort of a blank slate in front of them.

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Rose Feerick: I think one of the things that I would start with is introductions. And by introductions I don't mean, "Here's my cv." I mean like, tell me what you care about. Let me share how I came to this work. So I would actually start with something that moves towards building relationship in an authentic way. So I might say, you know, how it is that I came to be working at Wisdom and Money, why the work with money is passionate for me, invite them to share the things that they really care about. Because that's what we're looking for: a relationship. And so that's one thing I would do is to see if there's a [connection]. I notice I keep saying authentic because there's a way in which that can be, cocktail party-ish, but actually I'm really talking about can we get to the level of conversation where we are really talking about "Why is it that we're even here considering this?"

And then the other thing is to talk about, some of the things, like if I were the fundraiser in the conversation, to talk about some of the things that really inspire me about the work that we're up to here. So it's, "How did I get here?" So that's just me. So you know something about who I am, and then "Here's the stuff that I see happening in this work that really I find exciting." Like, what if the person, if you've had an opportunity to say some of the things that you find exciting, share that with another person, then I would pause and say, "Is there anything here that you notice really catches your attention or you want to know more about?" So that pause of like, "What's happening in you as even I'm describing this?" That's another opportunity to just... first it invites that person to notice where something might really be drawing them in, or maybe they have some questions. But it also, just it creates that pause and that place where the conversation potentially can go a little bit deeper.

So those are just a couple of things I might try. And then that is also that place where the reminder that you're really looking for the people who are jazzed about this vision. So it's not really so much like convincing or like manipulating or trying to close a deal energy - not in this framework that Henri Nouwen is talking about. I know those things can operate, but we're really looking for the people that catch sight of something, of spirit that's happening in the work. So that's the place we're seeking. So I know the targets, the numbers, those are all very real. But when we're trying to root our fundraising in spirit, we really do need to build in those pauses for our humanity and for each person to just check in "What's happening to me" as I'm speaking or as someone is listening. Those are a few things that would just come to mind.

Wendy VanderWal Martin: Now this rich conversation is really just a teaser for a five-part series that we're preparing for in February - that we're hoping everyone who's participating today will take a serious look at being with us over a longer time where there is room for pause, where there is room to discern. We hope that people will take advantage of the opportunity to purchase *A Spirituality of Fundraising: the workbook edition*, and be doing the exercises that Nathan Ball put together in response to Henri Nouwen's work.

What do you hope that people will get out of our five part February series where Wisdom and Money will have a session, but we'll have other guests as well who are coming from slightly different vantage points in this whole arena? What, why would someone want to invest that much time and intentionality into a spirituality of fundraising?

Rose Feerick: That's a great question. I think for me, the way I think about it is I would really love for us to be in a world where the decisions about money are rooted in the deeper parts of our human heart, as

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well as in the spirit. The place where those two meet the Holy Spirit and the best in human beings. Can you imagine a world where money was flowing like that? That's the world I would love to see. So why would somebody come to this work? It's because when we sit either as donors or as fundraisers or nonprofit directors or ministers, really we are in a opportunity where we can invite that shift. I think we all know the ways that money can move in our society that are not rooted in spirit. And here is a place where we're inviting all of us, whether it's the asking, the receiving, the giving to be about a very different flow.

And then when that money can shift and move like that into organizations that are really trying to respond to what's happening in the world and bring care, bring love, bring increased justice, that for me is the hope for the world. So money ends up being a great practice place for how can we move our lives from ways of being that perhaps are fearful or rooted in scarcity to ways of being where we are open, where the spirit can move through us. So that's what we're trying to learn to do. So we sit with Henri's book, the workbook, with each other, just sharing things we've learned about "What does it take to move money from a place of just transaction to a place of spirit?" and trying to create goodness in the world.

Wendy VanderWal Martin: Thank you so much, Rose. What a rich conversation.

Rose Feerick: Thank you for inviting me and for being with me today.

Wendy VanderWal Martin: Mark, you're going to be a part of our five-part series in February. What would you especially say to philanthropists?

Mark Petersen: I believe it's going to be beneficial not just for charity leaders, but also for philanthropists. And I hope that many givers show up and participate in this. I think it's going to offer some new perspectives on fundraising and on grant making that will really challenge the status quo that we we are all used to - and that we all kind of feel like there's something a little bit wrong with it. You know? Because Henri Nouwen is offering a different way through his work. I also think that this will help to normalize the idea of fundraising and grant making as ministry. That what we are doing is a ministry. Whether we are giving funds or whether we are fundraising for funds, we are able to have a ministry. This is bringing the Kingdom of God close to hand, as Henri Nouwen wrote in the book. I think that people will start to expand their minds and learn what he's talking about as they engage with the series coming up.

Wendy VanderWal Martin: Thank you, Mark. Whether people are giving significant and large gifts or whether they're giving modest gifts out of a place of sacrifice, we believe that a spirituality of fundraising, really seeing all of our work in this arena as an aspect of vocation, as an aspect of co-creation with God, participating in bringing in the realm of God, that it's a place we can all grow in our spiritual lives and really embody a much healthier posture than many of us think about when we think about fundraising.

Brian, what do you hope people will get out of our February series?

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Brian Bachand: I think two things, I hope people get out of it. First of all, to realize you're not alone. That is one of the greatest gifts, and I think Henri speaks about that as well. And especially in the spirituality of fundraising. It is about building community and to realize if you are a fundraiser, whether you're early in your career or you're seasoned or you're a board member and now you have a campaign coming, you are not alone. And that's the gift of this program because you realize you're not alone. It is a way to tap in not only to your spirituality, but to learn from others that are incorporating that and bringing that out into their ministry, into their work daily. And number two, I think it is a powerful way to reconnect with your vision and your mission because as Henri says in *A Spirituality of Fundraising* that when you proclaim your vision, you're proclaiming out to the world, something that you are creating and inviting others to be part of that collaboration. And when you lose your mission, you lose the purpose of where to go. And it's a beautiful way to rekindle that vision and mission because for those who are fundraising, sometimes it gets caught up in the transaction of things and it's very important to get re-anchored back into that. And that is at the heart of *A Spirituality of Fundraising*. And this program is going to help you to really not only anchor that, but to embrace it with a greater joy and ease as you move forward in your fundraising program.

Wendy VanderWal Martin: Thank you so much friends for setting aside intentional time to join us for this conversation. I hope you found it more than worthwhile. We've alluded several times to the fact that we're hosting a five-part series this coming February. We're going to have these guests again, Rose and Brian and Mark, they'll be joined by Ben Keesey, who's the director of development at the Center for Action and Contemplation. And Kerry Robinson, who's head of Catholic Charities. So much goodness! We can't wait to welcome you to the series. And so to make that even more attractive, we've decided to do an early bird rate. Register in the next two weeks and you'll receive an individual rate of just \$59 for those five sessions. Not only that, you'll receive a 20% discount on *A Spirituality of Fundraising: the workbook edition*. We give thanks to Upper Room Publishers for that additional benefit. Sign up today and I look forward to seeing you in February!

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