



## INTERVIEW WITH BRUCE MAZA – MARCH 20, 2013

*Our State of Generosity*, a project of the Dorothy A. Johnson Center for Philanthropy (JCP) at Grand Valley State University (GVSU), in partnership with the Council of Michigan Foundations (CMF), Michigan Nonprofit Association (MNA), Michigan Community Service Commission (MCSC), and GVSU Libraries' Special Collections & University Archives present:

An interview with Bruce Maza on March 20, 2013. Conducted by Kathryn Agard, primary author and interviewer for *Our State of Generosity*. Recorded via telephone. This interview is part of a series in the project, *Our State of Generosity* (OSoG). OSoG is a partnership of scholars, practitioners, and funders from four institutions – the Johnson Center; CMF; MNA; and MCSC – that collectively form the backbone of the state's philanthropic, voluntary, and nonprofit infrastructure. OSoG's mission is to capture, preserve, analyze, and share the developments, achievements, and experience that, over a period of 40 years, made Michigan a State of Generosity.

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**Abridged:** The following interview has been edited to assist readability. Extraneous verbal pauses and informal personal conversation not related to the topic of Michigan philanthropy have been deleted. Footnotes to the transcript have been added clarifying any factual errors in the memory of the person interviewed.

Text of the interview questions are as asked. Individuals interviewed have had the opportunity to add or edit their answers in order to provide their most accurate answers to the questions. For these reasons, the edited transcript may not exactly reflect the recorded interview.

**Kathy Agard (KA):** What you remember the most?

**Bruce Maza (BM):** What I most remember are the ways in which you and Jim and I communicated in a way that we supported each other very personally during a period of time when we were called upon to be obsessive in our attention and service to the organizing committees of new community foundations. It took from them this personal commitment, energy, focus, [00:01:00] empathy. If we hadn't been able to talk to one another late at night and say, "You'll never guess what happened today," or, "What would you do if you were confronted

with this situation,” or, “I have the executive director who is having her first tiff with the founding chairman. How do you help them to reach consensus—.” There were all of those very personal things, because at the end of the day this work is so deeply personal. Particularly, we were aware that we were helping leaders in local communities set precedents for behavior that would help to maintain the culture of giving in their local communities, [00:02:00] and there was no work that was more important.

I remember the moment when you, Kathy, said in one of these conversations, “It has occurred to me that we are changing the world.” That sentence proved to be, for me, a bolster to my own energy and attention that turned out to be 24/7 [laughter] for the years that we did that work together. I think that the personal collegiality, therefore, that we established was a critical element to the success that those programs have had since. [00:03:00]

(KA): Can you talk a little bit more about that, Bruce, in terms of was that just circumstances, or do you think it could be replicated by other people in similar situations?

(BM): I think that one of the things we learned – I am certain that the fact that Michigan and Indiana, next door to one another, we’re doing work that was similar and that the people who were doing it were willing to understand themselves as being close working colleagues, supportive of one another even in the personal ways, was one of the elements that proved successful. So if you were inventing a model [00:04:00], finding a way to create collegiality in differing places among those who were doing the work – and when I say collegiality, I mean real collegiality – would certainly be an element that folks ought to try to build into such an effort.

(KA): A couple of people have suggested to me that [00:05:00] the strength of the relationships in Michigan and within the network is great, but it also leads to a closed system. When you think about the role of relationships in this work, does it cause people to get shut out?

(BM): Well certainly the dynamics of the projects that we were working on in those days was one that – well, the first element of which was a welcome. What we represented when we flew into our respective towns for the first time was a spirit of welcome. So in our particular [00:06:00] case, no, I don’t think so. I certainly don’t recognize any behavior in the work that we did that shut anybody out.

Now the nature of the community foundation, the energy underneath the very idea of a community foundation, is to welcome all comers. And so, no, I don’t think so. If on the other hand you mean, and I can certainly see the point, [laughter] once people get jobs in private foundations



and they keep them and therefore, there is, in fact, a confraternity that looks like those who are not in it as walled, I'm sure that that is true. But I [00:07:00] actually think that is the nature of the beast. The reason is because we are dealing with what society believes to be a very strong power structure, and there are those who are in the power structure and there are those who are not. Therefore, I think that one of the moral imperatives of working in this field is to do everything that one can – we've talked about this a thousand times – to exhibit behavior that will help to break down that power structure.

Even the language. Tony Proscio's old books, old philanthropic books, that are designed to explode the jargon [00:08:00] of the grantmaker, because so much of the jargon of the grant maker arises out of the power and balance from grantseekers and grantmakers. Therefore, it gives – this is a conversation that's been going on for decades. So yes, I'm going to suppose there are instances or facts about the field of private philanthropy that produce this sense of division. But in the community foundation, I think that is very much less true because community foundations are always seeking to form relationships with new generations of donors and doers. And therefore, there is something that is [00:09:00] different about that work.

(KA): Could you talk a little bit about what you've learned from that experience in community foundations? In particular, about what you observed of local leadership?

(BM): Yes. I've talked obviously over the years since we did that work together, I've thought a great deal about this. I am convinced at the end of the day that the community foundation instrument is perhaps the most complete example of all that is good, that is powerful, that has potential in the American voluntary sector. The community foundation is the single institution where are, represented in its very functioning, all [00:10:00] of the driving forces that make the American experiment in democracy valuable – all of them. It is perhaps the one place where the energy of all of the three sectors gather under the leadership that is primary voluntary in nature. It is the place where donors express their deepest values, their deepest concerns, and where they preserve the behaviors that they each believe were most valuable in their lives and in their communities while they were there. By creating endowments to support those behaviors, they demand that those habits [00:11:00] of life will continue when they are no longer on the planet.

So leadership is able, in the community foundation setting, to focus on what is most valuable in the community at the present moment. In other words, I think that at the end of the day, donors value the community foundation instrument for two reasons. One, unlike any other – well, no, not unlike any other – but with unique power, the community foundation teaches succeeding generations about permanence. So donors value community foundations because of permanence. It is the place [00:12:00] where all of the leadership and division of labor are



mustered around the concept of doing, of performing habits permanently in the community that are life-giving.

And secondly, locality. This is about the community that individuals can know. The scale is human. Therefore, by interacting with the community foundation, the leadership of the foundation is constantly gaining new possession of the knowledge of where the greatest human resources are in the local setting. [00:13:00] It is to those that that ever revolving, ever nurturing knowledge of where the greatest local human resources are is where then the money that is proposed by donors in the community foundation is to be directed.

(BM): Therefore, there is such a dynamic relationship between donors from the past supporting the best, most hopeful, most productive human resources in the present. And that said, that's very, very powerful. [00:14:00] But that's part of the reason why the community foundation is so welcoming.

(KA): Share with us a story or two about what it was like to go into a brand new community where they didn't know all of these things about community foundations. What was that like?

(BM): It was the joy of the elementary school teacher. I mean, if you think about – at least, I think some of the most joyous people, certainly, I had some of them in my elementary school education. That image – frankly, that image of you and of Jim, I mean – I thought of us that way. That we interact with... we were the lucky ones. We got to take people who were attracted to the idea for all kinds of reasons, probably because it was Kellogg dollars and [00:15:00] Lilly dollars. Maybe. That's what kind of made people's eyebrows go up. Okay, fine. But it is amazing how quickly the attraction to those financial resources faded. Because when they actually got in the room with us and heard about what the possibilities were, they didn't think about the money anymore because the potential for human interaction, for creativity in the voluntary sector, for a newly energized sense of citizen leadership was awakened. That's particularly important; I'll come back to that.

All of a sudden, [00:16:00] we were there simply answering the wonderful questions that came out of a roomful of genuinely excited people who were finding newness and the excitement of novelty in understanding themselves and their fellows in the community as having capabilities they haven't thought of before. We were there to answer those kinds of questions that came. There are these images of classrooms, the fourth graders with their hands in the air saying, "Teacher, pick on me. Pick me, pick me. Answer my question." There was a sense of that, and that was just simply joyous. It was fun to be in a room where people [00:17:00] were asking



questions to which we, in fact, have the answers. I would say personally, the sense of being asked simply to be a teacher at the beginning of the learning curve was terrifically exciting and energizing. Of course, it wasn't that when I say we had the answers, we had any kind of genius or anything like that because simply what we were doing was talking about human behavior. It's simply that in the setting and in the structure, it was new to those who were asking the questions.

(KA): Could you talk about [00:18:00] when in a local community, the leadership just took off? Boom! You know, it's gone. You knew walking out of the meeting that everything was going to be fine. And then the flipside experience where you walked out of a community thinking, *oh, I'm going to really have to work on this one*. I think they probably all made it, but some were a little more of a struggle than others.

(BM): There were two characteristics. The first one was [\[Unintelligible\]](#) you could tell that they had in their own minds assigned themselves distinctive roles. I said a few minutes earlier [00:19:00] when the division of labor worked, I am certain that the most important characteristic of the successful young community foundation was when a sense of team pervaded the organizing group. What I mean by team is that not everybody was the quarterback and not everybody was the tight end. I have now exhausted my knowledge of football and I don't even know what those two roles actually do in football, but I know they are important.

So the good point is we have that wonderful little list that we did about the stewardship responsibilities of this professional nonprofit organization, and there are five. [00:20:00] We put them up on the inevitable newsprint in those days, [laughter] and you could see that individuals in the room gravitated to one or another of them. "I can't do that, but I can do that." As I watched the individuals in the room embrace and assign to themselves responsibility (for either asset development or strategic planning or marketing or finance and accounting precision), they saw themselves as a team – each participating in a division of labor that most accurately reflected the individual strengths and [00:21:00] experience of each of the volunteers who had come forward to be the inaugural leaders of the organization. I knew that was going to be a success.

The second characteristic was that there was at least one person who could clearly imagine themselves having a conversation with someone who was at the moment when they were deciding what to do with their assets when they no longer needed them. At least one, because what we knew was that the first time that that conversation happened in the community, the precedent has been set. The hardest endowed gift in the community foundation to get is the first one, but once it happens and once that story [00:22:00] can be held as a treasured icon in the lore



of the local community, others will see, “Ah yes, I too can do that.” So if there was just one person who could imagine themselves having that conversation with an old friend or neighbor or family member, for that matter, then I knew they’re going to be okay. Whereas if I left the room with a sense that nobody could imagine themselves doing any of the things that I’ve just talked about, “well, what do you mean telling the story when it--.” If I felt that there was resistance or [00:23:00] inability to identify with either the division of labor or with a conversation with just one potential endowment donor, then I knew it was going to take longer, it was going to be difficult.

(BM): Or at very least, that we didn’t have the right people in the room.

(KA): Perfect, thank you. One of the things that is kind of related to this is that both Michigan (the Kellogg Foundation) and Indiana (the Lilly Endowment) decided to go against the prevailing wisdom...

(BM): It’s – we’re going on 20 – so 25 years on. I still feel uncomfortable, maybe even wounded by those in the field. One in particular that I recall was at a [00:25:00] major private foundation in Michigan and another who was a senior officer, staff officer of the national Council on Foundations who actually believed that Kellogg and Lilly were deeply wrong-headed in their way of thinking, of creating all these little community foundations who are going to go wrong or bad and soil the nest, impugn the reputation of the instrument for the rest of the country. At least, that’s I think what they thought. Or one of the arguments was that these programs were going to be extremely wasteful because they [00:26:00] would require expenditure on overhead in many communities, they preferring, at very least, the large regional community foundation. Or there were those in the country who had a stake in the preservation of the already established state-wide community foundations. We said that, and I remember Helen Monroe (who was the champion of the Lilly Endowment’s effort and to this day is still the senior consultant of the Lilly Endowment’s efforts on behalf of community foundations in Indiana) saying we can neither force a community foundation to be established [00:27:00] in a local community or we cannot prevent one from being established.

I always thought on the argument of either proliferation or of overhead, expenditure. If in every community, there is a lawyer; if in every community, there is a doctor; if in every community, there is a church; if in every community, there is a chapter of the Boy Scouts and the Girl Scouts; if in every community, there is a homeless shelter, ought there not to be a competent instrument, a group of volunteers and professionals whose calling in life it is [00:28:00] to maintain the culture of giving upon which all those values-forming institutions depend for their continuity? Of course now, the nation in its behavior is proving that the idea about competence in the preservation of the culture, competence of leadership in the maintenance of the culture of giving



upon which the voluntary sector depends is being affirmed – finally, after 230 years of the existence of this republic – by the fact that even one of our leading [00:29:00] universities is establishing a school (not just an academic center, but a school, like a law school and like a med school) of philanthropy. The fact that the two leading academic centers to study and thereby enable the harnessing of the power of voluntary sector leadership are in Michigan and Indiana speaks volumes to the self-consciousness of leaders in those places about the valuable role of the voluntary sector and the culture of philanthropy upon which it depends for its existence. So it speaks volumes [00:30:00] of that self-consciousness.

Now at the end of the day, all of this work that has been done in Michigan and Indiana is about creating a new and more complete understanding of what citizen leadership is. In this experiment in democracy, citizen leadership includes competence in the management of, or I should say, includes competence in the wielding of the power not only of the public and the private sectors, but also and equally of the voluntary sector.

(I actually believe that 25 years on in this work that we did together in community [00:31:00] foundations, the value of that project is not actually about the money. I don't know. An awful lot of people measure it by *today there are expedient of dollars of permanent endowment in local community foundations in these states or there are more* – I have to admit, I am fond of saying “In Indiana, there are more community foundations per square mile than in any similar square mileage on the face of the earth.” That is actually not what the real value of that work was. I think the real value of the work is the tens column, the now tens of thousands of people who have exercised their minds and hearts as trustees of those foundations because the quality of citizen leadership that [00:32:00] has been experienced and enhanced by those tens of thousands of people who have wrestled with the assignment for the creation of quality of life through all three sectors is what the great legacy of this project is; that there are those having served on community foundation boards of directors who have a new, vitalized and ever revitalized experience of the power of a society that is based upon not only the ancient, too, but also the third sector and what that means.

(KA): Along that same line, it strikes me that Lilly and Kellogg, in their own ways – each are – oh, I suppose every private foundation is its own entity. I mean, it has its own personality. But, you know, they're not in New York and they – they had commitments to their own states. Can you talk a little bit about the foundations and in particular, you had a catbird seat on the relationship between them. So you have two big private foundations with different agendas, and yet particularly during this period of time, there was – I don't know if they actually work together or it was parallel play, but can you just reflect a little bit about the relationship of these two big foundations?



(BM): And unfortunately, they weren't at the time friendly faces. I am now convinced that, in retrospect, the negative judgments that were made of our work back then were made by those whose primary devotion was to organizations rather than to individuals in communities. Their opposition to our proliferation was actually because they saw themselves as somehow needing to defend the power and influence of already existing organizations. Rather than [00:35:00] what we were doing was to make certain, as you said, in asking the question that every citizen would have available to him or her a competent instrument through which they could express their own philanthropic intentions. The tension between protecting already existing institutions rather than understanding that the goal was not the health of the institutions but rather the health of [\[fellow - \]](#) would be practiced by all citizens was where the tension lay. I think it's important to say that now.

(BM): Okay. Now the two big institutions.

(BM): Who knows? I mean, you know, you and I and Jim lived at that time. We were simply laborers in the vineyard, and we were concerned with each individual grape plant, and for that matter, each individual grape. [Laughter] I have no idea what the lord of the vineyards absolutely were thinking about either their own work or themselves.

What I do think is that the Kellogg Foundation and the Lilly Endowment – and they were both eloquent; Certainly, Lilly was eloquent and I think Kellogg [00:37:00] was too – were concerned and stated themselves as being concerned at that time about strengthening the institutions through which individuals defined, refined and transmitted values across the generations. I don't know at that time what other big foundations understood themselves as doing, but there was a certain mature self-awareness among the leaders of the Lilly Endowment and the Kellogg Foundation that what they were doing was [00:38:00] precisely that. They were providing opportunities for, and building the structures through which individuals could express successfully the habits of the heart that gave meanings to their lives. And that's what it was, I think. And in both cases. I mean, if you think about Russ Mawby, the way he thought about people, [00:39:00] – put it this way. They began their discussions about grand philanthropic strategies thinking about individual people living in local communities. They didn't begin, as it appears to me we are now inclined to do, with a hefty report of statistics. It's not that they were in any way resistant to the reflection and self-awareness that can come from data mining; but that the impulse that gave rise to their strategies was [00:40:00] an apt and accurate assessment of how individual people exercised the values that gave them what they called their quality of life. If they could help build organizations who focused on those people while they were





exercising those habits of the heart, then they would be certain that future generations would have access to the honest richness of those people who were living out their lives finding [00:41:00] a way to learn and live and love better.

(BM): I think that's what, at that time, what distinguished – I mean, if you think about all the lore about the eccentricities of the people who founded the Kellogg Foundation fortune, or for that matter, who founded the Lilly fortune. Even the businesses that they were in were simply finding a way to make people better. One was food. The other was pills. There is something there in that impulse underneath, the generative impulse [00:42:00] underneath the creation of those fortunes that was actually about figuring out how individuals live better lives. You know, that could be a dangerously undergraduate line of thinking. I don't want to push that as any bolts of enlightenment. I don't mean that, but I do think that there was something about – you could even make the case that there is an element of the marketplace in that impulse. After all, contracts are sold to individuals and [\[Unintelligible\]](#) sold to individuals. [00:43:00] [Laughter]

(BM): You know. And therefore, you start with that and then move to the creation of structures that will make certain that those habits are appreciated and practiced and refined and then eventually transmitted.

Lilly and Kellogg, either by default or by genius, [laughter] identified people who were willing to give themselves utterly and completely over to this work for the inaugural phase. They identified people who were willing, in a sense, to give up their lives for the inaugural phase when responsiveness to the field, to the people in the field that we were creating, on a 24/7 basis was a requirement.

Helen and I used to argue about whether or not [00:02:00] I and my little part-time team of part-time people were too responsive and thereby were building (in the lives of the first executive directors, of the first boards of directors of new community foundations) dependency rather than capacity, our technical assistance. I believe that in the initial phase (that first five or six years when we were doing this work), the fact that we were able to be there utterly, body and soul, for those important conversations in critical moments in local communities as these structures were being absorbed and practiced for the first time was a huge [00:03:00] element of the eventual success of all of these organizations.

Therefore, Kellogg and Lilly found people who not only were willing but who actually wanted to do that. Who realized, as I think I did, that it was the opportunity of a lifetime to drive in a battered Volkswagen from community seat to community seat inside the State of Indiana and talk with these golden-souled people who are in the process of catching the vision of what could happen



in their community; and who knew that we would be on the other end of the phone, or would be breakfast in one community, a lunch in another community and an evening strategic planning session in another community. Reliably, then, it was the same group. [00:04:00] It wasn't that *well, today you've got George, and tomorrow you've got Martha*. Frankly, it was Kathy and Bruce.

In the early period, the fact that they knew they could count on us and that we knew their stories and that we had daily an increasing fund of experience from other places in the state that might be useful to them in their thinking was the... If there are historians, as you are now doing, whoever studied this, I think they will recognize that technique of sending out the Wycliffe Bible Translators [00:05:00] [laughter] to these communities at the beginning.

Now the other thing that we figured out was that there would come a time when they no longer needed, and in fact shouldn't have, Kathy and Bruce. They got to the point where as their questions became more and more technical, they needed the authority of experts in – oh, in organizational development, in donor relations. We also were very self-aware when they were going to need a palate of technical assistance, and each color [00:06:00] its own authority. But I think technically speaking, to have concentrated the focus of the early learning in just a few of us was in fact a strategically successful method.

I think personality did have – in fact, as you say, it could be [Unintelligible-Fred Nefel?], absolutely. It wasn't that we were uniquely qualified, although the skill sets that we did have were replicable: the fact that we were intellectually trustworthy; the fact that we were committed; the fact that we [laughter] remember details; the fact that we were empathetic to the fact that we were dealing with adult learners. The techniques that we needed, I mean – I remember conversations you and I literally had about learning techniques. The truth is, I'd never even thought about that before. But the fact that in the middle of our work, we realized that we have the bone up on the ways that adults learn were different from the ways that young people learn and use them. We would ask. We were self-conscious about what we needed. Our funders at Lilly and Kellogg were willing to hear from us about [00:09:00] what additional resources were needed in order to be effective. That alone was critically important.

They weren't a disciplinarian over the budget. Charles was willing to say, "Well Bruce, what do you need do you think?" Particularly because the other thing was they were, unlike foundations tend to be, attuned to the fact that this thing had a potential for success that they had not originally imagined. Lilly and Charles thought they were gonna build 15 community foundations in 20 years, dear Lord, [00:10:00] and they built 90 in 10 years.



(KA): I'm really glad that you went through that set of skill sets and the kind of person you need because that'll be good advice to others who might want to embark on this kind of a project.

(BM): Well, that could probably be plumbed more fully in some other sessions as well because to think about that... For example, in the Michigan project, Jim McHale's presence in that project – because your method, your MO focused first on youth funds – was indispensable.

(KA): And almost totally unrecognized.

(BM): Absolutely. He was able to engage kids in philanthropy in a way that was body and soul. The story of that one Youth Advisory Council (that one YAC) that went to the prison or the detention home because that's where one their members had wound up – that's huge.

I've never been sure – well, you found Jim. You figured that out. [00:12:00] That needs to be studied just a bit. I have often wondered, Kathy, if you and Kellogg were going to do this again, would you start with the youth focus?

(KA): I would. [00:11:00] I think it helped to have the youth focus in some ways because every community cares about their kids. So it offered another way to get to the hearts of the people at local communities. I might change the mix of incentives and the structure of the program, because often we had to undo later the idea that these were youth foundations.

[00:13:00] We had some unintended consequences. Because Kellogg paid cash on the match to the youth fund but we counted endowment (long-term endowment gifts that were pledged for the match), we ended up with some community foundations that had more money in their youth fund than they did anywhere else.

(KA): That was totally – that was dumb. It was totally unintended. [00:12:00] We hadn't thought about what would happen with the ramification. I think we learned a lot about structuring the incentives in a way that would get us a result. So I would make those changes. I think having the youth piece of it did add a little more spark when I was talking with people. It made it more concrete in some ways.

(KA): What we should have done too, though, was what Lilly did with the administrative costs. I had hopes that we could have done that because I think it was too big a leap [00:14:00] for the local people – or it was a hard leap – to put money into administrative costs for an organization that didn't exist yet and hadn't done anything. Normally, a nonprofit goes through the phase of



everything volunteer and working its way up. But because we required staff, we were asking communities to put money up front for administration when they really didn't know what they were betting on. So I like the Lilly model that way. [00:13:00]

(KA): So Bruce, what do you worry about? You have been in this field a long time. You have sat in many seats and on many boards and from many perspectives. What is on your worry list at the moment?

(BM): Two big things. I am very clear about this because I am currently sitting as an officer on the board of the National Center for Family Philanthropy, which is [00:15:00] the specialty organization think tank that was launched just 15 years ago by Ginny Esposito who had been, for the 15 years prior to that, the director of The Family Foundation [The National Center for Family Philanthropy] – actually, the inventor and then director of The Family Foundation wing at the National Council on Foundations.

Fifteen years ago, there were changes at the council – and there are even today new changes with the council – that I think make the National Center even more important in the field. But the point is, this is the organization that addresses itself to: observing the behavior and the evolution of the field of family philanthropy; and (you know this [00:16:00] better than anybody) of being sensitive to, and we hope eventually responsive to, the needs of succeeding generations of people who want to practice philanthropy in the family setting – whichever vehicle that you use; and to being self-aware about what the distinctive power and the distinctive challenges of philanthropy practice in the family setting are. To understand what family-based philanthropy is and what its challenges are is the fundamental requirement of the preservation of the culture of giving.

I'm in that world and so what do I fear? First off, I fear that [00:17:00] the field has not – although I think it's on the verge of doing so and it is attending to building structures that will do so – identified the next generation of iconic leaders who will serve as the graybeards of our family foundation field. If you think about the fact that Bob Payton is gone, that Paul Ylvisaker is gone, that John W. Gardner is gone, and we could go on and name other names. We have not created a new generation [00:18:00] of those – and they are created. Somehow or another, they come to the attention of larger groups of people and the fields, as they have happened in the past, have created the platforms upon which they can stand on, be admired and learned from. We haven't done that. So that's one of the things that we need to attend to.



I think that the creation of the Johnson Center and the Frey Chair is a step in the direction of doing that. Whether or not those who sit in those chairs are going to become those eminences or not, I don't know yet and I don't know how we know that. But I don't think we should wait for 40 years on the off chance that they will. [Laughter] I think we need to be more somehow proactive about that. So that's one [00:19:00] of the things that keeps me up: the creation of recognized icons in the field to whom we can point for their exemplary service and behavior.

The other thing that I worry about, and I'm going to sound completely like a luddite fuddy-duddy in saying this; but I believe that media is – rather than creating as it is purported to do bodies of energy, of synergy – atomizing society. I fear that the habits of the heart that lead to a commitment [00:20:00] to giving and acts that characterize that whole culture of giving upon which voluntary sector enterprise depends is – we'll put it this way. I was going to say it's in danger. I don't know whether it is in danger. I'm not competent to make that judgment. But I do think that any impulse that atomizes people, that interrupts a recognition of them (of their own hopes in eyes of others), is a threat to the creation of social movements [00:21:00] and expectations about the well-being of large groups of people.

(KA): Those are two great concerns. I've been really worried about especially the first one, too, and I haven't thought about the second one. But it just doesn't seem to me that I see anyone emerging in that. To go back to your other point Bruce, one of the things I know was a motivator for me was I never wanted to disappoint Dottie and Russ. I don't know that we have people who inspire that kind of – because of who they are, because they are such great people. I don't see them anywhere.

(BM): Yeah, I would agree. I felt the same way about Charles. I mean, my goodness, this golden-souled man who could see into the future. You know, Bob [00:22:00] was that way.

(KA): Thoughtful, reflective life experience. So my last question and then I'll let you go, [00:23:00] is if you would help, just for the record, to let us know about how you wandered into this field. Was your family philanthropic in terms? Was your mom a volunteer? How did you wander in into your current job? So to start with, in your life, what kinds of things molded you?

(BM): There are three formative stories I will tell you and then the thing that happened to me that led me to a career. I'm very clear about this.

I grew up in a town that was so small. There were about 150 people in my village. My father was the school superintendent. When you live in a [00:24:00] social setting that is that small, that line



about it takes a village is literal in a way – I mean the aphorism, “It takes a village.” I actually lived in a setting that played out. The way I grew up was a literalization of that, gave rise to that aphorism. Another way to say it is that every single citizen in the community behaved as if they were a grandparent or an aunt or an uncle or a cousin. I know that sounds maybe like Hell, which there are negative comments on that, too. [Laughter] But the point is that the whole community was deeply, deeply mixed together. [00:25:00]

It was also the place where the county fair took place once a year. Everybody in the community had a role to play in producing the county fair on behalf of the whole county. In addition, there was only one church in the village and everyone was a part of it. So I grew up in a setting in which the interconnectedness of all activity – business, government, and voluntary sector – were in every way, everyday apparent. We weren’t self-conscious about it. It was called life in the village of that size. The philanthropic impulse [00:26:00] I remember with a clarity that is shocking.

My dad had a hobby, and it was to breed gladiolas. When they bloomed, in order to deal with the bulbs and the plums and all that, he would cut them and my brother and I would stand next to him in the garden and hold out our arms and he would lay the long [Unintelligible-plums?] of the gladiola across them. Then we would walk the quarter of a mile down into the village and knock on the doors of old widowed ladies, as they were called in the [00:27:00] community.

We would give these gladiolas to these ladies. In our little village, probably the largest single group was widowed ladies. I remember them – Mrs. Kelsey and Mrs. Maynard and Mrs. Cole. I remember their faces when they saw these two little boys with their arms full of flowers and making a gift of the flowers to the ladies. There was something so powerful in what was happening as these little boys gave flowers to these ladies. That impressed on me in a way that I cannot overstate the role of the donor, of the giver, and the way that giving affects human relationships. [00:28:00] I count those giving of those gladiolas as the beginning of my being attracted to the human behavior involved in giving.

Then I went to college and I thought I was going to be an actor, frankly. I went to college, I went to graduate school – that’s all a long story. But I wound up one morning in New York City at the New York City Opera Guild, which at the time was the only structure at the New York City Opera at Lincoln Center that raised money. But I didn’t know that. I didn’t understand that when I got there. [00:29:00] I was thrust instantaneously into the activities of the grand ladies who threw the fund-raising parties for the New York City Opera. Within the first week, I discovered that I was in the setting of giving. I became instantly fascinated with why these grand ladies did this and how they generated behavior that produced the desire to give to the opera company.



And that has been the through line of the entire career. The fascination with the moment at which donors decide to give has been the through line of the entire career. [00:30:00] I have worked as a fund-raiser, I have worked as a grant maker and I have facilitated the understanding of potential donors who might give to community foundations. I have worked with two private foundations in which those just giving decisions were constantly being made and continue through to this day. And while there are many elements of my career that has now become wearying – but only because they have had to happen too many times – the fascination with the moment in which the decision to give is made remains as strong as it did when the little boy was taking gladiolas to Mrs. Maynard. And that really is the nutshell [00:31:00]. I can even say this without emotion because I am so clear about that's how it happened. It's amazing how something formative in a child's life turns into a lifelong fascination with an act. That's how it happened for me.

(KA): Yeah. When you were thinking about the fact that we were gonna talk about all of this, was there anything that you wanted to make sure got on the record that I haven't asked you, that we should make sure to get covered? Of course, we'll be at this another year and a half so there will be other opportunities, but I've got you right now. Is there anything else that you want to make sure we add?

(BM): [00:33:00] [Pause] I need you to know that when you said to me, "I think we're changing the world," it was the first time that I ever had the kind of self-awareness that spurs deep, durable energy. I don't think of that as an egotistical [00:34:00] thing for either you to have said or for me to have contemplated, because the consequence of your having said it in my life was that I found new strength and new stamina in understanding that fact that I am not sure I would have otherwise. So be careful what you say, Kathy Agard... because people take it seriously.

(BM): So that's one thing that is important for me to say. The other thing is that I am daily grateful for having been called to that work and to have been able to do it with you and [00:35:00] Jim at that time.

I am very fortunate. I have gotten to do lots of wonderful stuff in my life. I think I am one of the most fortunate people I know because I have actually had a succession of work to do that, I thought at the time and I think now even more, was meaningful. You know, there are scientists who study human behavior. They have the meaningful work. It is maybe one of the two most important things that people have on out.

So I am very fortunate about that, but I think that – the last comment on this – [00:36:00] the work that we did is actually worth studying. I'm sitting here thinking Kellogg and Lilly ought to, at



very least, convene the 20 people who were most central to those projects over the last 20 years and parse it. I mean literally parse the story of the – well, you know, your insight about how you would change the matching incentives now. We have Helen and I, and [Jenny and Simone] probably have some things that we could share with others that could be very useful, but they really ought to do that. I mean, they wouldn't even have – you know, they are – they are both so careful about not tooting their own horns that they – they wouldn't even have to publish it, but they really ought to capture [00:37:00] and write it down while we are all still alive, you know. Maybe that's something that will come out of your work, I don't know.

...So it won't be lost. That said, I am increasingly interested in the concept of durability and I'm not the only one. Build to last, that kind of impulse. It does appear that we did in fact build functions that were durable in local communities, and that is very gratifying. [00:38:00] We set out to build something that was durable, and the durability is the preservation of the culture of giving. And lo and behold, it happened. And that's to be clear in one's work that one is attending to durability of habits that produce larger, more humane life in large numbers of people. I think it is about what a moral life is about. For you and me, the trick is [00:39:00] to find what is the next thing [laughter] that we can do; and you're doing one of those, and I'm in the process. We've just finished here [at CE&S] what Mr. and Mrs. Jones have publicly [Unintelligible] legacy project, and it is the building of what is going to be the nation's largest new urban park. And practically, everything that I've said to you today, that could be said of the creation of 4,000 acres of new parkland as well. This is what parks are about, our habits.

(KA): And community and a place for people to be able to engage one another. That's a great project. You'll have to invite us down when it's ready to go.

(BM): Oh, a must, yeah.

