

# **The Philanthropic Quest Retreat**

## **Learning Outcomes**

## Meta-outcomes for your participants:

- To see extraordinary success in something they want to do. It's likely to be the high-stakes "problem" that drew them, which gets replaced by their compelling picture of what success would look like.
- To be inspired to achieve this compelling picture and to inspire others. To be an exemplar who positively influences the people around them.
- And perhaps also to say, "it changed my life" (as many have said about the experience).

Behind-the-scenes ...

## What you are achieving in the retreat for each person — and how.

"You" below always refers to your participants.

**THEME 1: YOUR PERSPECTIVE**, the mental models and frameworks that you work from.

- Being aware of choice -- you simply haven't been exposed to all the choices there are
- Individual reflection of who you are -- your identity.
  - Especially two aspects of your identity:
    - you are a contributor – a contributing member of society
    - and you are a leader
      - ... This is same as you'll do with others -- who will see themselves as contributors and as leaders.
- *Grounded* hope, inspired by the past, crowds out cynicism. Appreciation crowds out criticism.

## Your Perspective: How do you show up?

Learning outcome for participant	How achieved
<p>1. Heighten your own confidence that a difference can be made</p> <p>... and <i>you</i> can make a difference. Self-efficacy.</p>	<p>Tailwinds -- “What would aliens see?” Many achievements were once inconceivable.</p> <p>“A time when someone saw something in you?” (That person was a leader -- when they influenced your identity. So you too have the personal power to influence a person’s <b>identity</b>).</p>
<p>2. You will <b>understand the “spirit of contribution”</b> because you know your own experience as a contributor, and what conditions facilitated that.</p>	<p>The interview</p>
<p>3. Able to see things in different ways (creativity, <b>innovate, re-frame</b>).</p>	<p>Mini-lecture on what we did: the mental models and frameworks that you work with.</p>
<p>4. The power of a strength-based <b>appreciative approach</b>. And why that works better than the downward spiral of deficit discourse.</p>	<p>The affirming and energizing experience during the retreat.</p>
<p>5. Knowing what motivates <i>you</i>, and how you’ve become a contributor gives you insight into engaging another person’s contributory spirit.</p> <p>(For one thing, your perspective includes knowing there’s a built-in <b>desire to make a difference</b> among all of the folks you work with. It can be heightened).</p>	<p>Quest summary diagram at end of module 1 -- to fill in the blanks from your experience: “factors/conditions that led to my contributions.</p>
<p>6. Knowing there is an effect when you let your <b>empathy</b> and curiosity show (so another person feels understood).</p>	<p>Having been an interviewer and interviewee, you know what it feels like to be understood.</p>

<p><b>7. Re-frame from “organization needs this to be done” or “organization needs the money”</b> to a goal of partnering on something of significance because both parties have a stake and have resources.</p>	<p>Mini-lecture on the equation: it’s more about what we <i>contribute</i> than what the <i>needs</i> are -- because that’s what the stories tell us.</p>
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This perspective of yours (above) is actually your “operating theories” of how humans grow and develop, and are motivated to contribute. In turn, knowing this feeds your presence and how you show up (below)...

**THEME 2: YOUR LEADERSHIP PRESENCE** is greater than you may have thought. You'll not be "trying to get somebody to do something." Instead, you can set up the conditions for them to inspire themselves. Use *yourself* -- your presence -- as an "instrument" for what you want to see!

- That's why it's so important to pay attention to *you* -- why we spend so much time at the outset on your own experience (The best way to learn what may motivate others is to learn what's motivated us).

Your Leadership Presence: To influence those around you, what do you do?

Learning outcome for participant	How achieved
<p>First, Your self-identity: you own up to your being a <b>contributor</b> in your own right (contributing member of society), and others will be inspired by your example.</p>	<p>Interview, q&amp;a handout after interview about what happened during interview.</p>
<p><b>Besides your identity (and your perspective), you develop 3 skills:</b></p>	
<p>1. <b>Ask questions:</b> inquire with inspiring, appreciative, generative questions — ones that come naturally from genuine curiosity and open up new possibilities for the person, the organization, and society.</p> <p>Always be thinking: what <b>question</b> can I ask – instead of selling, telling, presenting, persuading. Have the confidence to ask personal, unusual questions, always in a spirit of appreciation.</p>	<p>The entire workshop experience (and how we say little and ask much).</p>
<p>2. <b>Evoke stories</b> – use <i>their</i> stories to give them new insights that lead to new possibilities -- ones that go beyond the usual "telling the organization's story." These stories become creative springboards for bolder dreams and unstoppable acts. (We're releasing the built-in desire to <i>do</i> something -- to make a difference, make a contribution. These are acts of leadership.)</p>	<p>Notes: If you directly ask a person (or do a focus group on) "What's important to you?" or "Why do you contribute?," you get more of an opinion, which may contain a hint of a real answer – or not.</p> <p>Instead, if you ask for a story, you may find a truth that is new even to the person telling the story.</p>

	<p>You can use this personal story, rather than the organization’s story, to build trust..</p>
<p><b>3. Connect so the person feels deeply understood</b> -- learn how to practice appreciative listening -- a way of being that goes beyond the usually prescribed “active listening” to really hear what’s underneath, with a genuine human positive regard.</p> <p>It stretches “empathy” -- putting yourself in the other person’s reality -- so the person knows they are <i>understood</i>. (Also allowing the person to hear themselves!)</p> <p>Accelerates the growth of trust and long-term relationships. Connection in contrast to objectification.</p>	<p>Know what it feels like to be understood and appreciated: include this in “what was that like?” after interview.</p>
<p><b>It could be boiled down to just “be” (presence).</b>  How? All 3 of these capabilities/skills (1. Ask questions, 2. Evoke stories, and 3. understand) contribute to the new emerging type of <i>leadership presence</i> – in both you and the other person.</p> <p>See this as your role of a leader: to define reality (what’s important, what’s possible) and positively influence others’ identities as effective contributors to the world around them.</p>	<p>The entire experience.</p>

### THEME 3: *YOUR COMPELLING PICTURE OF YOUR FUTURE*

- Your compelling picture: What would success look like, including your greatest contribution?

Learning outcome for participant	How achieved
<p>1. <b>Confidence</b> in self and belief in this system – so you dream more boldly and act with more oomph.</p>	<p>Being with like-minded people. And having <b>Summary Diagram</b> (fill-in blanks of your own discoveries during the retreat).</p> <p>You are getting close to articulating your compelling picture. And you will make a personal commitment to yourself during the workshop – just as a donor might make a \$\$ commitment, or as a person might make a significant commitment in other settings. What is <i>your</i> transformative commitment?</p>
<p>2. To know how each of us has a history that contributes to greater possibilities in the future. And how there is much richness and complexity to all of our lives. (Understanding that for ourselves creates understanding and empathy when we think of another person, and that understanding creates more trust.)</p>	<p><b>Your timeline:</b> seeing your context/system (your family, life + contributions), And how a person’s life can make sense looking back</p>
<p>3. This system that you’ve been experiencing is so powerful that it warrants being applied to its highest use in generating what may be the most significant contribution in your life – a <b>transformative commitment</b>.</p>	<p>Your compelling picture and Quest diagram (the “why” on the diagram you fill in during the retreat).</p>

## THEME 4: RETURNING HOME

- Your compelling picture is much more important than any plan! Keep mindful of your compelling picture.

### Your Return Home:

Learning outcome for participant	How achieved
<p>What <b>message do you want to send</b> as you take action on your “compelling picture”?</p> <p>In other words, what is the message you want to send to others, as you make your best contribution to the world around you?</p>	<p>Articulating the message you want to send with your contribution, sharing an aspect of it</p>
<p>How can others “get” this <b>back home</b>? How do you affect the culture around you?</p>	<p><b>Replicate the conditions back home:</b> When you were interviewed about your contribution, what were the conditions that fostered it?</p> <p>Example: begin a meeting by asking for a story.</p> <p>Practicing the <b>corridor conversation</b>, what you tell people when they ask you where you were yesterday and today.</p> <p>Keeping leadership presence alive: Appreciative spirit + engagement via questions. “Note to self” as a reminder.</p>