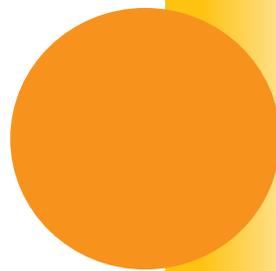


Leading From The Heart

Connection as a Catalyst for Change



LeAnne Moss, Author
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Thank You

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We are also incredibly grateful to the 38 interviewees who are listed on the first page of the Appendix.

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ABOUT THIS REPORT

It's a statement of truth that if you want to build a healthy and vital society, you must invest in its people—its leaders, visionaries, and those working directly with the most marginalized. In the social change movement, this is even more the case.

Taking that truth to heart, a small group of individuals came together in 2011 to look at how best to combine inner personal renewal practices and leadership development to support and galvanize social change leaders in the Seattle/Tacoma area. Interest in this work stemmed from two primary sources: 1.) the experience of some of those individuals in integrating inner personal practices and outer work; and 2.) national research about trends and programs that are helping to sustain leaders working for progressive, transformative change. This research has shown that social justice leaders who bring their whole selves to their work and re-imagine how the work is done have improved longevity, better relationships, and increased social impact.

With that in mind, the group recruited the Center for Courage & Renewal to be its temporary fiscal sponsor and then raised funds to conduct a more formal assessment of interest in this type of leadership concept, and to help illuminate the challenges and successes our area's leaders face in sustaining themselves and continuing their social justice work.¹

An Advisory Committee provided oversight throughout this process and several Honorary Advisors provided input as needed. From February to April 2012 two members of the Advisory Committee interviewed 34 local non-profit social justice leaders and four funders. More detail about this process is covered under this report's Methodology section. In addition, LeAnne Moss, project director, visited four programs doing similar work nationwide and talked with various local resources to gain a sense of whether this type of work for social justice leaders was already happening in the Seattle/Tacoma area. The appendix lists those organizations and individuals that might be potential partners in a future effort to bring a new leadership concept to this region.

This past May, 30 social justice leaders gathered to provide feedback on the themes uncovered in the interviews, and helped identify steps for moving forward. Information from that gathering is included in the Appendix.

Marrying a rich inner life dedicated to the cultivation of loving kindness and compassion with the practice of a new form of politics, economics, and public policy is the key to social transformation.

Michael Edwards, writer and activist with Demos and formerly of the Ford Foundation

1 "Social justice" and "social change" are interchangeable terms that refer to individuals'/organizations' efforts working for a more just, sustainable, peaceful, and ecologically healthy society. The work focuses on addressing the root causes of society's ills and often its constituents are the most marginalized in our community.

This report provides a summary of what we learned in this process and makes recommendations for moving forward with these insights. The Advisory Committee is very grateful to the supporters of this project and the social justice leaders who shared their time and perspectives so generously.

INTRODUCTION

There is no doubt that the world has become more complex and requires greater and more creative contributions from today's leaders. Those working for social change are often at the forefront in providing resourceful and long-lasting solutions to society's greatest problems. Their success—and that of their organizations—is critical to building healthy communities.

Unfortunately the reality is that many of today's social change leaders are working harder than ever while finding it difficult to sustain their progress. The economic crisis, continually limited resources, and political dynamics have all accelerated burnout and fragmentation among leaders, threatening the long term sustainability and success of their work.

While those societal trends may be largely out of the control of individual leaders, there are alternative and very effective ways for them to address sustainability and change at a more personal level. For several years, a number of efforts around the country have been creating a new way for leaders in the social change movement to develop and renew themselves, re-shape their organizational strategies and practices, and thus have an even greater positive impact in their communities. People involved in this work realize that, in order to transform the world, they need to also commit to transforming themselves. This involves coming to the work from a place of compassion and humility, while integrating a combination of personal mastery techniques, meditation practices, and other consciousness developing tools to spark connection and deep change within the individual, the organization, and the movement.

We have already witnessed the benefits of this deeper awareness and integration in well-known world leaders. Nelson Mandela, Aung Sang Suu Kyi, and historical leaders Mahatma Gandhi and Martin Luther King Jr. knew that to carry on their work they needed to engage their hearts at a transformational level as well as their minds. Each of them in their own way cultivated an inner experience and what some would call heightened consciousness and deep love. This type of integration of heart with mind helped sustain and guide them while they built their world altering social movements.

Likewise within the current business community there is growing recognition of the need to do inner work to shift consciousness within an organization. In her article, "The Business of Saving the World," Elizabeth Debold

shares the story of McKinsey partner Michael Rennie and his work using personal transformation practices to change organizational culture. As Rennie says, “Organizations don’t change; people do.”

Rennie’s data further backs up his claim that, as a critical number of individuals increase consciousness and personal mastery, a ripple effect is created through the rest of the organization that creates a culture of greater care, commitment and creativity.

In The Leadership Learning Community’s article, “Leadership Development in the Social Sector: A Framework for Supporting Strategic Investments,” authors Grady McGonagill, Ed.D. and Claire Reinelt, Ph.D. discuss the importance of networks in order to form bonds of trust and bridge differences. They also make the case that “[i]f the value of leadership—and leadership development—has been demonstrated under favorable economic conditions, it can be assumed to be of even greater value in times of scarce resources, when tough choices must be made in strategic ways.”

So what might this integration look like? By connecting inner awareness practices with organizational development, as well as visioning and capacity skills development we gain a greater connection with ourselves, with others, and within the social change movement.

What do those connections mean?

Connection with Ourselves

This is the foundation for change and includes such personal awareness practices as reflection, meditation/mindfulness, introduction to energy work, creative expression, body movement, somatics, and journaling. The purpose of this work is to help us reflect on our internal conditioning, our values, our old beliefs and patterns, and to activate a deeper internal source that can help us become more centered and ultimately change how we engage with the world. This step is critical because, if we aren’t aware of our own internal make up, we’re not in a healthy position to build the relationships necessary to forge social change.

Connection with Others

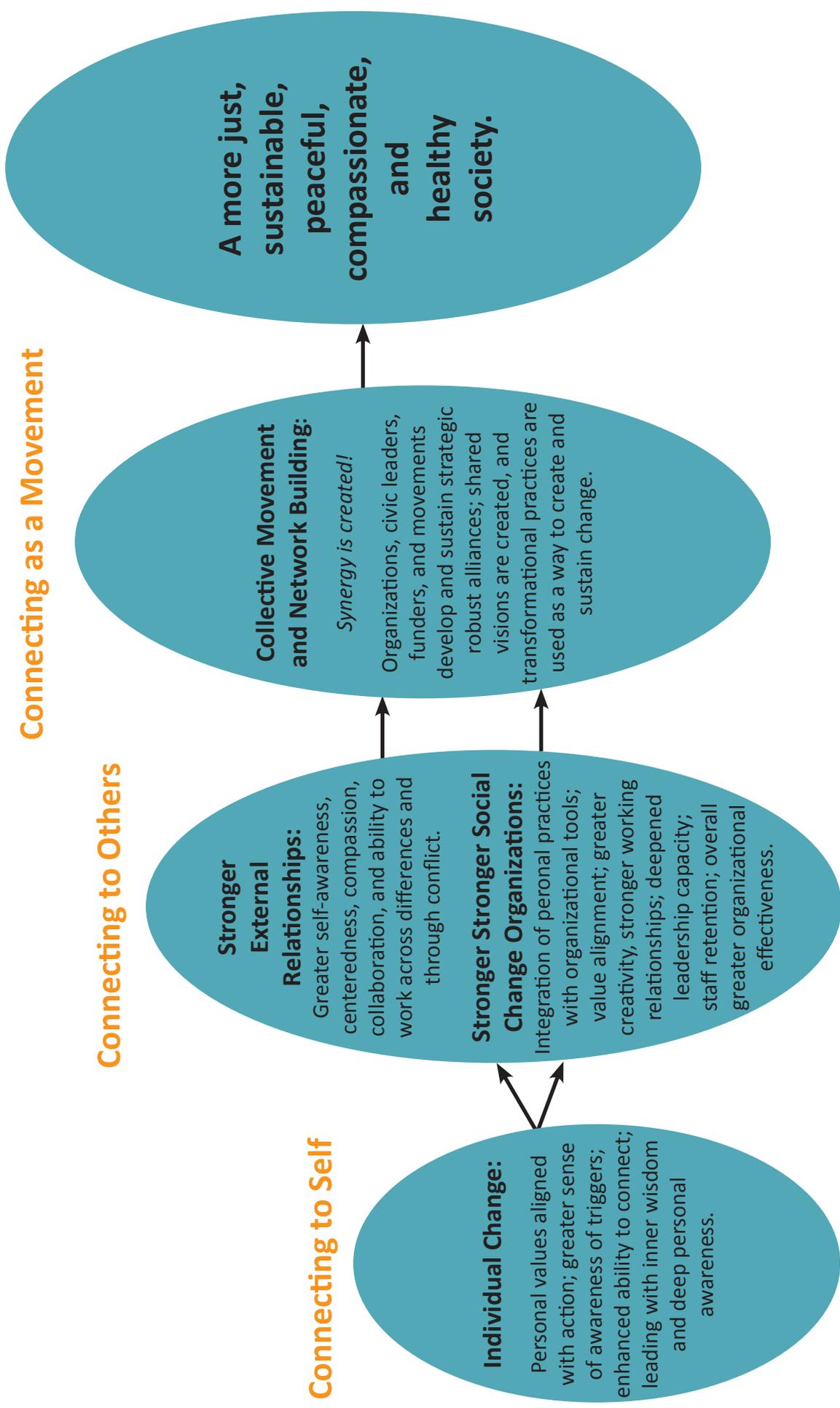
These are practical resources and tools that help people incorporate personal awareness practices within their organizations, resulting in better decision-making; increased creativity; and strengthened relationships with staff, board, constituents, and allies, as well as potential “adversaries”.



I’m convinced that it’s important for people involved in social justice work to pay attention to the inner work... to have some sort of a balance that helps to create sustainability on a personal level and that at some point it helps to guide the work.

Marcos Martinez,
executive director of Entre
Hermanos

LEADING FROM THE HEART: PROCESS OF CHANGE



Connection as a Movement

With self-connection and connection to others comes deepening trust and bridge-building. The resulting synergy fosters networks that are better aligned and able to leverage the work of individuals and single organizations to benefit the greater social change movement and create the transformational change so badly needed today.

Although it might be tempting to frame this work as “leadership development” or “capacity building”, it is much deeper than that. Instead this work is broader and more catalytic in terms of truly transforming how people connect to themselves and each other in a way that creates synergy, momentum, and opportunity for new collective and creative ways of creating societal change. The merging of these two elements—the inner and outer work—is critical for the difficult times we face today.

In its paper, “Out of the Spiritual Closet”, the Movement Strategy Center (Oakland, CA) documents the successes of programs that help leaders sustain themselves and connect inwardly in order to better achieve their missions. Gihan Perrera—one of the social justice leaders featured in that document—states: “We need to be able to put ourselves in a mental, emotional, physical, and spiritual space that allows us to open up to new ways of doing things and relating to each other. Unless we let go of our over-reliance on purely intellectual approach and begin to use and nurture our inner knowing or spiritual wisdom, I don’t think we’ll make it.”²

We need to be able to put ourselves in a mental, emotional, physical, and spiritual space that allows us to open up to new ways of doing things and relating to each other. Unless we let go of our over-reliance on purely an intellectual approach and begin to use and nurture our inner knowing or spiritual wisdom, I don’t think we’ll make it.

Gihan Perrera, Miami Workers Center and participant in transformational leadership programs

METHODOLOGY

The Advisory Committee decided to test this concept of integration first through individual interviews with non-profit (NP) social justice leaders, and then through a discussion with a broader spectrum of NP social justice leaders to share the results of those interviews.

Individual Interviews

For the individual interviews, we initially created a list of 83 potential social justice interviewees in the Greater Seattle and Tacoma area based on knowledge and contacts within the committee, and via recommendations from others in the field. We prioritized candidates who had more than one

2 Zimmerman, K., N. Pathikona, B. Salgado, and T. James, “Out of the Spiritual Closet: Organizers Transforming the Practice of Social Justice.” Oakland, CA: Movement Strategy Center, 2010: 5. http://movementstrategy.org/media/docs/6450_Out-of-the-Spiritual-Closet.pdf.

recommendation and represented a cross section of populations served (i.e., gender, age, cultural background, sexual orientation, and organizational focus). From that list, we interviewed a total of 38 individuals: 34 NP social justice leaders and 4 funders. (This exceeded our goal of a sample pool of 25 individuals.)

Most of the people we interviewed were in their organization's top leadership position (e.g. executive director). There were two exceptions—a program director and an advocacy director—whom we interviewed because of a recommendation to do so based on their work.

Our questions covered personal and organizational challenges and successes, experiences with and views on collaboration, strategies for self-sustenance, and requirements for organizational sustainability. We also asked them to respond to the hypothesis below and to some of our program ideas. (Our findings based on these questions are in the appendix.)

Hypothesis: Those working for social and environmental justice swim in strong currents.³ To sustain this important work, a quality of leadership practice is needed and it must be integrated with deep dimensions of the inner life. To be effective and to maintain a sense of joy and purpose in this work, we believe that strategic action by itself is not enough. No matter how many programs or initiatives are created, successful and long term solutions to societal ills won't be solved until we approach this work with deeper inner awareness, compassion, intention, love, and sense of connection.



Andrea Caupain,
executive director
Central Area Motivation Program

Post-Interview Gathering

On May 21, 30 social justice leaders came together to hear and discuss the themes from our interviews and to learn more about the potential of this inner transformational work to help sustain themselves and their organizations. Thirteen of the 30 were interviewees. Eleven attendees who had not yet been engaged in this project signed up to be a part of a “Stewardship Circle” that will help steward the next steps of this work. Their first task will be to take the feedback from the gathering and make recommendations about programmatic implications. (The members of the Stewardship Circle are listed in the Appendix.)

3 As discussed in this report many factors contribute to those currents including personal and organizational challenges as well as broader social, political, and economic issues.

THEMES

Most of the content below reflects the conversations with the NP social justice leaders, although comments from funders are interspersed throughout. The 38 interviews revealed four strong common themes which are discussed below in no particular order:

Theme 1: Relationships, connection, and trust are important on all levels.

This idea is summed up in this comment by one NP Social Justice Leader: “I do think the ability to feel connected to one another is important. There’s a movement away from this a little bit, but the work is siloed and being able to have spaces to meet others doing the work and feel connected to a bigger community and learn from one another ... makes you feel more supported.”

Connecting with others: Relationships with family, staff teams, mentors, peers are what sustains social justice leaders and is what they want more of, particularly more connection with like-minded colleagues. Interviewees expressed a need to have a safe, trusted space for connecting on issues of race, class, and gender, as well as power and privilege: “[W]e wish we could have more deep conversations about anti-racism.... [W]e don’t get to how race impacts [our work] and how we are affected personally because that’s too personal and vulnerable.” (NP Social Justice Leader)

Relationships with funders: From the perspective of NP social justice leaders relationships with funders are important and there is a desire for improvement in that arena. Individuals expressed two levels of disconnection with funders: 1.) between what funders want and what the community or constituency wants (particularly around organizing people); and 2.) between funders and interviewees about how long the work takes, as well as what constitutes realistic goals, impacts, expectations, and measurements. A couple of people of color relayed the experience of feeling “tokenized” at times: of being asked to be at the table with funders but then not feeling fully seen and heard.

Relationships and connection within the movement: As one funder noted, “Relationships are underrated.... [Social relationships and networking concepts] can go a long way to helping anyone do anything.” Social justice leaders also noted that relationships are critical for success and yet there are some challenges, in particular competition for



Sharyn Shiu Thornton, InterIM Community Development Association
Terri Kimball Center for Children and Youth Justice

funding that tends to strain relationships and create a “turf” feeling (for more about this see Theme 4: Collaboration). Two of the funders interviewed acknowledged this strain as well. NP social justice leaders also reported power dynamics between large and small organizations that work together, reflecting the strain or tension felt when smaller organizations experience unilateral decision making or lack of recognition from larger organizations. Another concern was how to build trust and relationships in and among communities of color and feeling “siloes” or fragmented within the social justice movement. Several people also noted intergenerational issues in the movement—needing to nurture and develop younger leadership while continuing to work with older staff who aren’t retiring yet because of economic or other reasons.

Theme 2: There is a push/pull around sustaining oneself.

“It’s uncomfortable but true—we (social justice leaders) have the culture of the 80 hour work week and we have no idea about how to address it. Practical elements would be helpful.” (NP Social Justice Leader)

“[My work] can feel chaotic, exhausting, and not sustainable.” (NP Social Justice Leader)

Not surprisingly, the ongoing challenge of sustaining oneself and having balance in one’s life is alive and well in our region. In almost all interviews people expressed the need to take more time for oneself to do inner work, and yet they also acknowledged the challenge of making that happen. In fact, seven of the 38 interviewees said “I don’t” when asked how they sustain themselves. On the other hand, there were others who had done some inner practice (meditation or other practices) but still found it challenging to make it a priority.

While people are doing justice work for the larger sense of vocation and because they feel connected to something bigger than themselves, a number of people commented on the personal and livelihood sacrifices they are making—not having enough in retirement, for example—and yet they wouldn’t want to be doing anything else.

“Someone like me doesn’t come to this work for the money and it’s not for the glamour or the good hours or family/life balance. It’s about the personal reward, the satisfaction, the feeling like we have so little time on this planet that making best use of that time to leave some type of impact after we’re gone is so meaningful and important.” (NP Social Justice Leader)

I spent a lot of time as a kid rejecting my culture.... I think all refugee and immigrant kids go through this—you see all the deficits and not the strengths of your culture. You never blend with people so you always feel that. As you grow up you realize the strengths that your background provides. So I thought if I went through this, others are going through this and if I do a good job maybe others won’t have as hard a time.

Vu Le, Vietnamese Friendship Association

Along with that, however, they also expressed guilt about taking time for themselves when their staff members are also working hard.

Connected to this is the underlying tension of needing to work on the day-to-day operations and changes, which leaves little time for longer-term strategic visioning and planning. One person described this as the “whack-a-mole” feeling: just when she gets one thing done another “mole” pops up and she has to “whack” it, which keeps her in a state of urgency, unable to attend to long-term work. That feeling is exhausting and contributes to burn out.

Finally, some people acknowledged that to sustain themselves they need to address some of the negative feelings within themselves and the movement that have been motivating in the past:

“One thing I’ve noticed for a long time is sometimes in social justice work we’re motivated by anger and outrage, which is appropriate but not sustainable. You can’t do this work just fueled by anger because you’ll burn out and be an angry person, so you really need to have something balance that out that will give you more fuel and be sustainable in the long term.” (NP Social Justice Leader)

Theme 3: People experience scarcity directly and also have “scarcity mentality.”

One challenge that consistently came up in our interviews was around funding: lack of funding, not enough long-term operational support, difficulty getting capacity-building support, competition for funding, the organizations’ internal issues related to the great amount of time it took to raise funds, and the challenges of showing impact when social change takes a long time to demonstrate success.

Smaller organizations and those serving communities of color directly seem to experience these challenges the most. One funder noted this as well, saying, “Refugee and immigrant organizations haven’t had the sheer level of resources and so progress has been slow.”

The impacts of these challenges on organizations are great: they aren’t able to provide as many services, they can’t take that capacity “leap” to meet the needs of their constituents, and some have also had to narrow their mission and not be involved in as many coalitions because of the time and money that takes. As a result, some people expressed feeling isolated.

Connected to this was an admission of “scarcity mentality” and having anxiety about funding, competitors, and not having enough time as well as money. One NP Social Justice Leader put it this way: “Sometimes we make things harder than we need to. It’s one thing to do something because you want to and another to do it because you don’t want ‘Sally’ or another organization to do it.”

Theme 4: Collaboration is both important and challenging.

The feedback around collaboration was mixed and significant enough that we felt it warranted its own theme. Some people reported positive experiences with collaboration. These were mainly groups that were structured to collaborate and it was part of their intentional framework for doing their work (e.g. around policy issues). Others mentioned “turf” issues and other problems. Funders also acknowledged the tensions around collaboration, time, and money.

What makes collaboration work?

In addition to the organizational structure factor mentioned above, people who had positive experiences with collaboration cited having their own criteria for deciding when and with whom to collaborate. Additionally they approached this relationship and work from a sense of humility and curiosity, were able to work through their differences and keep their eyes on the larger picture, and were able to recognize power dynamics and work through those. One person noted the role the Tacoma Community Foundation played in bringing together organizations to help them think through best practices for collaborating.



Michael Woo, GotGreen
Christa Mazzone Palmert, Sound Alliance
Andrew Himes, Writer & Activist

Barriers to collaboration:

The two most significant barriers identified by interviewees were scarcity of funds and a scarcity mentality amongst the organizations (this relates to the larger theme of scarcity as well). People described a competitive feel for funding which makes them less likely to collaborate if there aren't enough resources to support the full collaborative effort. This can block coordination and capacity.

Respondents also mentioned the time and energy it takes to collaborate, and needing to develop trust with an organization before jumping into a partnership. A lack of a group plan, not knowing who's most effective to work with, and few opportunities for new leaders were also mentioned as barriers.

A number of interviewees also expressed the desire to get out of their “silos”: “The right meetings and right people would be awesome.... Feeling like you're part of something bigger even when you're siloed.... [I]t's not incredibly evident what the other silos in the social justice movement are.... Would be interesting to know who else is out there” (NP Social Justice Leader).

In spite of perceived barriers, however, interviewees expressed hope that better and more resourced collaborations could occur.

LEARNINGS

Through this experience we learned that our hypothesis resonates strongly with both NP social justice leaders and several funders. In fact, *33 out of the 38 people interviewed resonated with this concept*. There is a desire and hunger for something deeper that can help forge bonds of trust and build deeper connections. But there is also tension as to how that fits into a high-paced, overly-committed work environment.

With that in mind, how would an effort that integrates inner practices with organizational tools and focuses on connection with self, others, and the movement address the themes found in our interviews? What components would need to be addressed and what would be the framework?

It is clear that the themes interrelate to one another, with the theme of connection being a thread throughout: connection lies at the heart of collaboration and sustainability; connection is a foundational consideration with funders; and connection with self around the scarcity mentality and sustaining oneself in the midst of that anxiety is fundamental to success. Having tools and practices that can help build connection and personal and organizational strength is vital to addressing these themes, as is having values around racial, class and gender equity as an anchor.

There are various programs around the country that provide models for such tools and practices. One organization, Social Justice Leadership in New York, articulates five practices that are core elements of this work. Other models share parts or all of these practices as well.

For purposes of this report, we are presenting the following framework as a way to describe the content and potential of an effort in our region to make a significant shift in transformational change. The framework incorporates inner personal practices with sound organizational tools that address our themes of connection (1-5), personal sustainability (1, 4), scarcity (1-5), and collaboration (1-5). The practices and tools for integrating the personal with the organizational are described below:

1. **Acting from Center** is the practice of being in balance and having the ability to respond to life with clarity and effectiveness rather than react from a place of unbalanced thought, emotion, or action.
2. **Interdependence** acknowledges that we cannot be successful alone, and that we come to relationships with people from a place of intent rather than happenstance.

What comes up for me is this is basically on target because it's only if we come from that place of connection that we're going to have a change in our attitudes and our systemic issues, and without addressing those, all of the programs in the world aren't going to make any difference in any meaningful way. So it has to be based more deeply.

Judy Pigott, Satterberg Foundation

3. **Deepening Ideology** frames the work in a social change context and aligns vision, goals, strategies, and actions within the change we want to see.
4. **Sustainable High Performance** means holding a very high standard for achieving goals while also attending to personal and organizational well-being for the long-haul.
5. **Building Power Strategically** is the practice of developing leadership and building alliances among social justice leaders in a way that shares power and has the greatest impact on raising public consciousness.

The following practices and values help shape the tools used in a program that promotes connection with the self, others, and the movement.

Connecting with Self:

- Meditation and mindfulness practices.
- Bodywork to know when you are carrying tension and what you can do about it.
- Increased awareness of one's intentions, beliefs, attitudes, and triggers that affect interactions with others.
- Skills for listening deeply and communicating authentically.
- Tools to help clarify one's purpose, vision, and life's work.
- Tools to take care of one's self physically, emotionally, mentally, and spiritually; and having a clear plan for personal growth and outcomes for one's work.
- Devoting time to personal leadership development and managing work so that it will have great impact in the long haul.
- **Result:** More compassion, personal clarity, and personal awareness; decreased stress; and enhanced ability to connect with others.

We do this dance where we typically won't talk about it [racial justice] or just present our plans, and we wish we could have more deep conversations about [the] anti-racism lens and our work.

NP Social Justice Leader

Connecting with Others:

- Group practices including reflective writing, mindfulness, and re-visiting vision and mission which result in greater engagement and more thoughtful responses.
- Tools for authentic and direct communication and listening skills with ways of giving and receiving feedback.
- A clear theory of social change and aligning organizational goals with larger world view.
- Tools for creative thinking and goal achievement.
- Ways to support life balance for staff members.

- Tools to create systems and habits to make sure goals are in line with long-term vision work.
- Investments in leadership development for emerging leaders within the organization.
- Tools to manage paradox and organizational change.
- **Result:** Greater engagement, more thoughtful responses, mission alignment, increased ability to evolve and change, staff retention, and strong working relationships.

Connecting Within the Movement:

- Tools to cultivate presence and centeredness in relationships with allies as well as adversaries.
- Tools to communicate authentically with allies and act in a way that cooperates and builds rather than competes with other organizations.
- Tools for doing planning in a way that aligns with other organizations.
- Tools to support the overall health of individual and organizational allies and potential collaboration for more resources.
- Space for synergistic conversations and brainstorming.
- **Result:** Improved relationships and response to life's events, creative collaborations, deeper authentic relationships, and greater collective impact.

[T]here's something about time away that is critical and building the synergy and connections really, really matters.... Having a cohort or group that you can really trust is really critical and I think getting away is a critical aspect.

Paola Maranan,
The Children's Alliance

Based on feedback in the interviews and research of other models, we believe the following to be important elements in a program structure:

1. Sustained time together

Creating intentional space and time away together helps strengthen connections and deepen trust. Research has shown⁴, and many interviewees articulated, that being with people over a sustained period of time in a cohort model is critical. Therefore, coming together for regular periods of engagement over a 12 to 15 month period will be vital, as will having some programmatic option to continue that connection after that time period.

2. Personal, customized attention to reinforce learnings

Many programs incorporate coaches and/or peer learning groups to reinforce learnings between cohort sessions. Some interviewees expressed a desire for coaches as well as a peer support network.

⁴ McGonagil, G, and P. Pruyun, *Leadership Development in the U.S.: Principles and Patterns of Best Practice*. Guetersloh, Germany: Bertelsmann Foundation, 2009.

3. **Expertise and diversity**

Having a diverse set of trainers/facilitators who have specific expertise and have been “in the trenches” is also a key to success.

4. **Utilizing various practices**

Incorporating creativity, nature and body work, as well as contemplative practices gives a holistic balance.

5. **Power and privilege**

Having a thread that addresses power/privilege, race/class, and gender bias is critical to transformative change.

6. **Connecting across sectors**

Because people commented on the “silo” effect, having the participants include social change leaders from a variety of arenas—environment, children’s work, poverty, public service—will help expand the potential for creative collaborations and synergy to emerge.

7. **Opportunity for connection with funders**

This is an area to explore in terms of how this model can crack open new kinds of conversations and potential collaborations within the philanthropic community. We know that there are conversations already taking place about supporting capacity building. The information in these interviews regarding the stresses regarding funding are not new, and it brings to light the question of what else might we do to provide additional resources for:

- Creative collaborations
- Infrastructure development, particularly for small organizations serving communities of color
- Renewal opportunities such as sabbaticals and team retreats



Christine Guiao, Zenyu

The benefits of this work are many: breakthroughs in creativity and in reaching goals, greater collective alignment, improved relationships, and more energy for the long haul, just to name a few. One benefit is the ability to be a stronger collaborator and negotiator, as demonstrated here in the story of how ForestEthics was able to save part of the Great Bear Rain Forest from logging. Because of their grounding in various transformative leadership trainings they were able to transcend entrenched conflict. As the campaign leaders recall:

At one point we found ourselves caught up in the same old battle, getting angry and getting nowhere. Then in the midst of it all, Merran passed me a note.... We suggested that we needed to take a break, come

back and revise the agenda. When we returned, the atmosphere was remarkably different—and we realized that it was because we'd brought an entirely new energy into the equation. Once we re-grounded ourselves, we realized that we needed to ... become curious, compassionate and ask non-judgmentally what was keeping them from changing? We took the time to understand what was behind their opposition, and in doing so they became human beings facing major challenges, just like us.... We brought the same energy to countless subsequent negotiations.... Time and time again we saw how important it was to stay grounded and compassionate, and how that energy had a transformative effect on what occurred. We had to let go of the ego-ic gratification of 'being right'. We had to avoid the all-too-common trap that activists fall into: the idea that being effective means being combative. In doing so, we unlocked an enormous power within ourselves to succeed where years of unyielding opposition had failed.⁵

In the years that followed and through consistent, compassionate negotiation, ForestEthics and its coalition were able to expand the rain forest's protected area from 7% to 33%. ForestEthics used its skills gained from the transformational programs to not only negotiate effectively with adversaries, but to help keep the coalition together when it threatened to break apart.

LOCAL AND NATIONAL RESOURCES

While we have spent the majority of our effort doing the individual interviews, we have also had conversations with local and national groups that do some of this work. However, we have not found any organization that has: 1.) specifically focused on addressing this audience (social justice leaders) as a distinct group and over a sustained period of time; or 2.) that includes an inter-weaving of intentional inner spiritual practices with organizational tools while also addressing power and privilege issues. We will continue conversations with these and other potential partners as we develop our unique effort further.

5 Transformative Practices for Social Change: Lessons from the Field by the Seasons Fund for Transformation. The Seasons Fund For Social Transformation Leadership Awards, May 2009: 18-19.

NEXT STEPS AND CONCLUSION

We will be moving forward with this project in the following ways:

- Soliciting feedback from the funding community at our June 8th gathering, which we hope will result in more conversations and engagement.
- Getting feedback from the members of our Stewardship Circle that will inform the program design.
- Creating a Design Team made up of local and national leaders in this work with the tasks of creating the overall programmatic frame and content for the program, and identifying potential partners.
- Reaching out to other potential local and national partners, including attending a training in Boston with the Interaction Institute for Social Change and a training in Portland with the Process Institute.
- Raising funds to support the program development and first-year pilot.

As Parker Palmer—author, educator, and activist—so powerfully puts it:

A leader is a person who must take special responsibility for what's going on inside him or her self, inside his or her consciousness, lest the act of leadership create more harm than good.... I've looked at some training programs for leaders. I'm discouraged by how often they focus on the development of skills to manipulate the external world rather than the skills necessary to go inward and make the inner journey.⁶

We are at a time in our history when our attunement to ourselves and each other is more critical than ever. The challenges we now face as a society require us to reexamine how we will create the change necessary to surmount those challenges. It is our belief that change will happen first from the within when we are able to show up with authenticity, clarity, and a greater sense of connection. When we learn to lead from the heart, we will create connections that catalyze genuine change.

6 From Joel and Michelle Levy, *The Fine Art of Relaxation, Concentration, and Meditation: Ancient Skills for Modern Minds*. Sommerville, MA: Wisdom Publications, 2003: 252.

APPENDIX

People

Our deep and sincere thanks to those who agreed to be interviewed and shared such great insight. We also thank those who participated in our May gathering and who have volunteered to be a part of our Stewardship Circle.

Interviewees

Lupita Ayon, Latinos for Community Transformation
Susan Balbas, Tierra Madre
Jorge Baron, Northwest Immigrant Rights Project
Alaric Bien, Chinese Information Service Center
Rev. Zachary Bruce, Freedom Church
Connie Burk, The Northwest Network
Andrea Caupain, Central Area Motivation Program
George Cheung, Win/Win Network
Chris Davis, The Nature Conservancy
Liz Dunbar, Tacoma Community House
Trish Dziko, Technology Access Foundation
Ceil Erickson, Seattle Community Foundation
Njambi Girushu, Kenyan Women's Association
Mona Han, Coalition for Refugees from Burma
Alice Ito, Marguerite Casey Foundation
Sunny Kim, Seattle Young People's Project
Vu Le, Vietnamese Friendship Association
Paola Maranan, Children's Alliance
Michele Marchand, WHEEL
Marcos Martinez, Entre Hermanos
Christa Mazzone Palmberg, Sound Alliance/IAF
Chris Morton, Associated Ministries
Estela Ortega, El Centro de la Raza
Aaron Ostrom, Fuse Washington
Judy Pigott, Satterberg Foundation
Bushra Rahim, Council on American and Islamic Relations
Jill Reese, Washington Community Action Network
Jessica Salvador, Campana Quetzal
Mar Schupp, Seattle Young People's Project
Sharyne Shiu-Thornton, InterIm Community Development Association
Zeke Spier, Social Justice Fund Northwest
Chris Stearns, Lawyer and Activist
Hilary Stern, Casa Latina
Lisa Stone, Legal Voice
Crystal Tetrick, United Indian Health Board
David West, Puget Sound Sage
Ada Williams Prince, OneAmerica
Michael Woo, Got Green



Beverly Spears, activist and consultant
Lillian Hewko, attorney, Legal Voice

Participants in May Gathering

Bill Aal, Tools for Change
Lupita Ayon, Latinos for Community Transformation
Jorge Baron, Northwest Immigrant Rights Project
Marcy Bowers, Statewide Poverty Action Network
Carol Brown, Abused Deaf Women's Advocacy Services
Jennifer Brown, Pro-Choice Washington
Rev. Zachary Bruce, Freedom Church
Andrea Caupain, Central Area Motivation Program
Christine Cruz Guiao, Zenyu
Chris Davis, The Nature Conservancy
Mishi Farugee, ACLU-WA
Anitra Freeman, WHEEL
Lillian Hewko, Legal Voice
Terri Kimball, Center for Children & Youth Justice
Rich Lang, University Temple Methodist Church
Steve Lansing, UFCW21
Vu Le, Vietnamese Friendship Association
Michele Marchand, WHEEL
Marcos Martinez, Entre Hermanos
Christa Mazzone Palmberg, Sound Alliance/IAF
Alyson McGregor, Peace Trees Vietnam
Shankar Narayan, ACLU-WA
April Nishimura, Zenyu
Kimberly Robson, NARAL Pro-Choice America
Sharyne Shiu-Thornton, InterIM Community Development Association
Beverly Spears, Activist and Consultant
Liezl Tomas Rebugio, ACLU WA
Ada Williams Prince – OneAmerica
Michael Woo, Got Green
Rose Yu, Center for Courage & Renewal

Stewardship Circle

Attendees from the May gathering who have volunteered to join the Advisory Committee in helping to inform the next steps:

Bill Aal
Lupita Ayon
Marcy Bowers
Carol Brown
Christine Cruz Guiao
Steve Lansing
Christa Mazzone Palmberg
April Nishimura
Sharyne Shiu Thornton
Liezl Tomas Rebugio
Beverly Spears

Local and National Leadership Groups

Non-profit Assistance Center
Pipeline (New York)
Rockwood Leadership Institute (San Francisco)*
Stone Circles (North Carolina)*
The Bainbridge Graduate Institute
The Center for Courage & Renewal*
The Center for Ethical Leadership
The Inner Activist (British Columbia)*
The Interaction Institute for Social Change (Boston)*
The Movement Strategy Center (San Francisco)
The Progress Alliance of Washington
The Whidbey Institute

*LeAnne Moss has attended trainings with these organizations

Demographics of Interviewees

Non-profit Social Justice Organization Information

Of the 33 organizations represented (two people from the same organization were interviewed because they are co-directors), nearly half (160) work with refugee and immigrant populations, including but not limited to: Burmese, Kenyan, Latina, Asian, and Arab. Three organizations serve majority black constituents and three serve the LGBTQ community. Two of the interviewees were from Tacoma and the rest represented Seattle-based organizations.

We received budget information on 23 of the organizations. Of these, budget sizes ranged from \$26,500 to \$6.5 million.⁷ More than half (56%) of these organizations have budgets under \$1 million; of these, 69% have budgets under \$500,000.

Non-profit Social Justice Individual Leader Information

Seventy percent of those we interviewed are people of color, representing Latino, Asian, Black, Native, Immigrant, and mixed-race populations. Twenty-five interviewees provided information on their age, which ranged from 23 to 65 years old. The average age was 46, the median was 50. In addition, 12 interviewees identified as male, 20 as female, and 2 identified as queer.

⁷ The larger figure represents only 1 organization which receives 97% of its funding from the government.

Demographics of the Funders Interviewed

Of the four funders interviewed, two represented family foundations of various sizes, one represented a public foundation, and the other a community foundation. Three women and one man were interviewed and ages ranged from early 30s to over 55. One was a person of color.

Findings from Interviews

As mentioned, we interviewed 34 NP social justice leaders and four funders. Below are the more detailed findings of those conversations.

Hypothesis

We asked interviewees to respond to the following hypothesis:

Those working for social and environmental justice swim in strong currents. To sustain this important work, a quality of leadership practice is needed and it must be integrated with deep dimensions of the inner life. To be effective and to maintain a sense of joy and purpose in this work, we believe that strategic action by itself is not enough. No matter how many programs or initiatives are created, successful and long term solutions to societal ills won't be solved until we approach this work with deeper inner awareness, compassion, intention, love and sense of connection.

Thirty-three of the 38 interviewees resonated with the hypothesis, with 21 communicating a high degree of resonance. Five people were either mixed about the concept or unclear about its meaning for them.

One social justice leader said: “[For me it’s about] in your day-to-day life in which you are touching and are touched by suffering and you have your own experience of suffering, how you can find a balanced way and a compassionate way to be with what is in this moment. And in being with it, you are transformed.”

Program Feedback

There was a spectrum of responses when we asked interviewees to comment on our program idea. The top comment from social justice leaders was related to content, stating that the program must:

- Add value in some way and be able to bring that back to the organization
- Address race/class/power and privilege issues
- Address staff development and management and ways to help other staff around burnout

Connection and safety was the second biggest response in terms of what people wanted, particularly feeling a sense of community among like-minded peers focusing on social justice issues. Related to this, social justice leaders expressed that having an intentional safe and trusted space for addressing race, class, and gender issues is very important. Longer periods of time away seemed to resonate to meet this goal of creating trust: “I’m a big fan of retreats. I feel like a lot of our interactions are superficial. The best thing is to get them into a long expanded amount of interaction where they get to see all aspects of personality...person-person connection instead of position-position connection” (NP Social Justice Leader).

The other top comment was a desire for inner awareness and introspection and the ability to get away. Framework suggestions included retreats, cohort models, coaching/mentoring. One person mentioned this as being “sacred time”: “[We] have to find a way to do this. This is a way to take care of self.”

Characteristics of successful models that interviewees named:

- Taking time away
- Ability to make practical application
- Instructors “from the trenches”
- Community feel
- Cohort

Some expressed dissonance with this concept: they wanted to take time away but acknowledged it’s difficult, can be costly, and they would feel guilty leaving their staff.

Successes

We asked people what was going well and what they feel good about in their organizations. More than three quarters of non-profit social justice leaders said they felt really good about the work they were doing. Within this, people mentioned great success with program outcomes, sticking to their program plan, having the program resonate with their constituents, engaging in successful systems change and campaigns, and a growing understanding of the importance of the racial equity lens and incorporating that into the organization. Other items mentioned were collaboration partnerships and increased visibility for their organization.

Funders also felt good about their work and about some of their collaborations with both colleagues and grantees.

Challenges

We asked people what overall personal and organizational challenges they were facing. Most of the responses below are from the NP social justice leaders.

Top Challenge: Funding

Not surprisingly, the issue of funding was the top challenge identified by NP social justice leaders. Almost everyone interviewed—although not all—identified this as something they face as an ongoing challenge. This challenge was articulated in several areas:

- A. Lack of funding availability. Over 40% of interviewees commented on a lack of available funds. Comments here revolved around the recession, difficulty in getting foundation funding for their work, government cutbacks, and more. This also relates to funding priorities and the difficulty in getting leadership development funded. (Related to this is the issue of funding mechanisms which is discussed immediately below.)
- B. Funding Mechanism. Five or more respondents mentioned barriers in this area which had to do with:
 - Funding focused on short-term projects rather than long-term investment.
 - Difficulty in getting capacity and operating funding.
 - Funder requirements and processes regarding restrictions and data reporting which might help the funder but is not helpful to the grantee's work, and which in fact cause more work for the grantee. There was an agreement about the need for accountability, and wanting that to take form in a way that also benefits the grantees' knowledge.
- C. Internal organizational issues related to spending too much time fundraising, and the challenges in telling stories and showing impact. The impact comments revolved around how to show impact when the change in organizing communities takes so long and is not always evident right away. Also mentioned here were challenges regarding educating individual donors on issues around scale and how long change takes.
- D. Competition. Several interviewees noted the competition amongst like-minded organizations for funding (also related to Collaboration which is discussed below).
- E. Funder Relationships. Comments here revolved around feeling that there was a disconnect between what funders want and what the community wants (particularly around organizing people), and a disconnect with how long the work takes and realistic goals and impact.

Several interviewees discussed key consequences of these funding challenges: not being able to provide as many services and/or do presentations, and having to narrow their mission and not be involved in as many coalitions. The result is a feeling of isolation and disconnection.

Other Organizational Challenges:

1. Race issues

Issues around race were described as:

- Within the movement—not confronting directly because conflict averse
- Within funder relationships—wanting to be at the table but finding it difficult at times because of a lack of cultural competency
- Within organization—a hesitancy to address the “elephant in the room”

2. Movement

Non-profit leaders described a range of challenges within the movement:

- Fractures within the social justice community
- Emerging leadership and intergenerational dynamics—new younger activists not coming up; programmatic challenges regarding training and people aging out; older people staying in leadership positions longer so no room for others to move in those positions
- Community fatigue regarding issues like homelessness and not enough housing
- Lack of cohesion within the refugee and immigrant community at large

3. Long-term vs. short-term work

Two funders joined the NP social justice leaders in acknowledging that developing long-term work while managing day-to-day work can be overwhelming. Several NP interviewees commented that they are spending so much time on fundraising and administrative work that it’s hard to do program and other planning work. Needs continue to rise and they are trying to be cognizant of creating good systems for growth.

4. Staff issues

These issues revolved around needing more staff but not being able to afford to hire; management issues in terms of managing during change; transfer of power and responsibility; keeping staff inspired; and overall management.

5. Personal Challenges

In the midst of organizational challenges, people talked about their own personal challenges. Nearly a quarter directly mentioned trying achieve balance and just having too much work. Eighteen percent of the NP social justice leaders referred to the challenge of sustaining their own livelihoods with lower salaries, and yet acknowledged that this was their choice. Others mentioned struggling to have clear personal boundaries, the affect of the work on family, and just plain exhaustion. At least two funders also mentioned the personal challenges of being overwhelmed and having to struggle to find balance.

Personal Sustainability

We asked people what sustains them when life and work is full and demanding.

More than two-thirds of social justice leaders responded that what sustains them is having good staff, seeing the results of their work, and success stories. Remarks about “good” staff centered around “having the right people on the bus”, having skilled staff leadership that help run the organization, and having good-hearted people.

The next two top sustaining items were family and some sort of inner practice. These practices included meditation, having a relationship with a Higher Power, having some sort of Christian or Buddhist practice (the two religious practices cited), and practicing gratitude every day.

Other items following these were having a stronger sense of vocation, connecting with peers and colleagues, having an intentional spiritual community, having friends, and connecting with program constituents.

Funders responded similarly: family, exercise, working with a good team, and seeing the good in things.

After this people identified a range of practices from setting boundaries, to bodywork, to having mentors and inspiring leaders, to creating intentional planning time, to sleeping. One person mentioned crying. Three people acknowledged that when they are feeling burned out they just “dig in” and grind it out. Seven of the NP social justice leaders admitted that they struggle with sustaining themselves and don’t know what they do or don’t do it “well.” They said they don’t have time for reflection and would like to have time to hear people’s stories.

We asked some—not all—of the interviewees what they think other social justice leaders at large need in order to sustain themselves. Once again, the most frequent response was connection and peer support:

“I think it’s wonderful to think about looking at ways of support for social justice leaders as broadly defined. Again, how do you balance the time to come together and nurture yourself and each other when you’re just getting hammered?” (NP Social Justice Leader)

“Feeling connected, relaxed at the staff level and organizational level. As a leader, I can’t very fully relax and fully participate.” (NP Social Justice Leader)

Other responses included help with staff leadership and development, mobilizing, funding help, new models of balanced leadership, and ways to handle anger:

“One thing I’ve noticed for a long time is sometimes in social justice work we’re motivated by anger and outrage, which is appropriate but

not sustainable. You can't do this work just fueled by anger because you'll burn out and be an angry person, so you really need to have something to balance that out that will give you more fuel and be sustainable in the long term." (NP Social Justice Leader)

Collaboration

"The right meetings and right people would be awesome.... Feeling like you're part of something bigger even when you're siloed.... [I]t's not incredibly evident what the other silos in the social justice movement are.... Would be interesting to know who else is out there." (NP Social Justice Leader)

The collaboration feedback was mixed. Some social justice leaders reported that they had positive experiences with collaboration, others mentioned "turf" issues and other problems.

Positive Experiences:

Of those who had positive experiences with collaboration, it was often because these organizations were structured around collaborating: it was part of their intentional framework for doing their work and how they were set up (e.g. Win/Win Network, Fuse, etc). Other specific comments about the positive aspects of collaboration were: when organizations do so within their own issue area; favorable experiences within the African community working together; and when the Tacoma Community Foundation brought organizations together to help them think through best practices for collaborating.

One funder commented that they feel really good about the bridge-building and collaborating they're doing with their grantees and that they are seeing their grantees do more of this.

Difficulties and Hindrances:

The two largest hindrances to collaborating mentioned by respondents was scarcity of funds and a scarcity mentality amongst the organizations. In particular people described a competitive feeling around funding so they are less likely to collaborate if there aren't enough resources to support the full collaborative effort. This sense of scarcity can block coordination and capacity.

In terms of lack of funding, respondents mentioned again the time and energy it takes to collaborate, and that they could do a better job if there were more resources that could support staff in this work.

The other top item mentioned in this category was the issue of "silos". People are more apt to collaborate with those in their circle rather than branching out, and they realize that moving beyond that is a challenge. Power dynamics between smaller and larger organizations was also mentioned as a difficulty. One person mentioned fragmentation within

the social justice community and another mentioned the difficulty in collaborating for refugee and immigrant communities (“We get swallowed up.”).

Connected to these issues is the difficulty of needing to develop trust, as well as some experience with broken promises or groups taking the sole credit for an effort when it was a collaboration.

Other barriers to collaboration that were mentioned are: a lack of a group plan; not knowing who is most effective to work with; no opportunities for new leaders; and no groups working on their issue (e.g. youth).

What Works in Collaboration:

People who did find collaborations to be successful and enjoyable cited several factors crucial to that success: having their own criteria for deciding when and with whom to collaborate; approaching the relationship and work from a sense of humility and curiosity; being able to work through their differences and keep their eyes on the larger picture; and being able to recognize power dynamics and work through those.

Focus of some collaborations mentioned included:

- Advocacy around human services
- Education and employment center
- Homelessness
- Civic engagement
- Systems change
- Environment
- Police accountability

Feedback on Interview Themes At May 21, 2012 Social Justice Leader Gathering

Following is the raw data feedback from the small group discussions at the gathering. Later in June, a Stewardship Circle made up of 11 attendees will take this information and make recommendations on programmatic implications.

Theme: Relationships, connection and trust are important on all levels

- We need to develop a sense of self-worth and personal value
- Training/resources/mentorship are needed for conflict resolution
- Research is needed to show effectiveness
- Blow off work and party! Bond!
- Reconnect to the roots of why we do this work (this helps build trust)

- Love the work, love the people you work with
- Ways to activate the collective to be focused on building relationship
- We tend to take care of others but not us
- Trust is critical – Steps 1, 2, 3, 4, and 5!
- Just do it – take the time to build trust
- Facilitation models to get together to build trust (don't think about solving problems)
- Incremental—will take time to transform work culture; will take leadership
- We accept limitations and buy into it
- Lens to look outside
- Goal oriented/task oriented; take the time. E.g. no staff meeting—go somewhere and do the check in
- Organization itself bad—accountability. Orgs need systems to look inside—why/how are we not walking the talk
- Skills for leaders/managers
- Realistic expectations—job descriptions
- Trust—foundation; must take the time and make commitment
- Just do it! Make time
- Get people out of their environment—spend time together

Positives:

- More committed—when challenges come up we can work through them
- Easier to address challenges with a group
- Individual grows understanding of themselves when asked to branch out and can take on bigger challenges
- Complimentary skills – when there's trust we can admit our weaknesses and collaborate
- Ability to build capacity (more people on board and think in broader terms but with allies high capacity)
- Spend less protecting – allowing us to go from vision to manifestation more cleanly and quickly
- Work better together and achieve more
- Less likely to work in silos

Challenges:

- Time—productivity viewed in tasks/outcomes
- Must work on adding value in building trust
- Culture of fear keeps breaking our will/trust
- Don't get to know each other limits ability to have trust
- Competing voices and power
- Scarcity of funding limits ability to trust others
- Racism—internalized racial oppression; racial dominance/superiority

- Missing accountability structures, within organization and across
- Not enough capacity

Theme: There is a push/pull around sustaining oneself

- Create mandatory breaks
- Institutionalize staff time to reflect
- Build in ED board evaluations in structure
- Value of support and reflection from colleagues
- Need simple act of “being with” not do
- Transform the CONDITIONS—transform what the work is (e.g. the non-profit structure)
- Move to collective transformation—ask if systems and structures are working (e.g. merger) and plug in people not in the non-profit structure
- Find intentional support from other EDs
- Divisions—distant self
- Don’t create polarity
- Have parameters with how much work the organization takes on. Funding supports unrestrained growth.
- Model it!
- Carve out space for EDs to come together
- This isn’t mainstream but science supports; put topics into funding community; put it in professional development
- Shift the conversation—well being. Can connect to what it means for employees and employer
- Cross over between SJ work with movement; include ore movement
- Look at turnover rate and make the connection (funders don’t ask that)
- Have a reflective approach to the role of technology (computer/texting, etc.).
 - How is it useful?
 - How does it control/drain us?
 - How to maintain mindfulness amidst the technology, etc.
 - Technology cuts off attention

Positive/supports:

- Having boundaries supported and respected in organization; reinforces your ability
- Remind self to relax and take time to breathe
- Creating clean physical space/create fresh clean to-do list; not overwhelmed
- Doing creative activities
- Recognizing and prioritizing self care (basics and essentials—food, sleep)

- Space and time to talk and be heard (also builds trust and connection)
- *Trusted colleagues who understand to share good, bad, and in between (organization and community)
- Shared sense of struggle/recognize common ground
- Recognize creative conflict—making it healthy and building collegiality
- Focus on the “wins”

Challenges:

- Hard to find joy in work (otherwise act of will)
- Hard to notice what’s going right/successes/give compliments
- “Hair shirt” mentality
- I can’t take time off if others are suffering
- Self-imposed internal voice/pressure
- Competitive environment
- Being accessible to community (Friday night calls)
- Sense of urgency of the work
- Finding ways to keep perspective
- Culture of fear breaks down trust

What Will Work/Principles:

Currently there is not a value placed on it...”less important”

Ask: “What does it mean to win?” Balance out short and long term.

1. Inner work—Shift perspective on inner work/spirituality. Transforming perspectives. Issues: supported with lip service, not whole heartedly; change what it means to sustain selves, art, dance. Find ways to release sub-conscious—not self medication.
2. Based on community building. (We come together in coalitions never to sustain selves). Shifting culture (scarcity).
3. Acknowledging issues within our communities by naming them. No progress without it.

Theme: People experience scarcity directly and also have “scarcity mentality”

Inner work: Blessing; reframing

Let large worry about the small too—and small worry about large—common struggle

Interdisciplinary—common goal, bigger picture, ecosystem, better and more just place.

Lessons of experience—some are good at this.

Intergenerational—Capacity.

- Need to look to younger generations for energy
- Inclusion—always intergenerational
- Mentor—facilitate

“Scarcity”—leads to competition—coalesce to share resources and strategies not scrambling after crumbs.

“Scarcity”—power; lots of volunteers; power; money; scarcity of time

Leadership—Definition

Triangle—staff... community. A leader is anyone who wants to help.

Shifting Culture

- Rejuvenating
- Refreshing
- Renewing
- Broad leadership practice

Forcefully close organizations certain day/week; livable wages

Conscience of what we can do. “That’s all.”

Honest re: human and financial resources

We are our worst enemies—it is us.

What kind of scarcity?

- Resources—we hesitate to dream big
- Lack of staff
- Lack of energy
- Meeting daily survival needs
- Inner resources—Faith; problems seem insurmountable
- Funding/competition (Are funders part of the oppression?)
- What can we take from personal boundaries to organizational settings?
- Trust!
- Gap between the talk and walk