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Harnessing Joy as a Catalyst for Philanthropic Change

Three simple questions to begin a joyful process of discovery with your clients.

Kris Putnam-Walkerly | Nov 25, 2020

During COVID-19, the world is watching and experiencing how systemic racism and injustice magnifies personal hardship and undermines recovery. At the same time, more and more people wonder how they can change the ugly and relentless reality of institutionalized racism and oppression and create a more just world. While we all

have a role to play, advisors find ourselves in a unique position. Often, we serve as truth-tellers, helping people and institutions expand their comfort zone.

How can wealth advisors help clients initiate or expand their philanthropy work as they ask the overwhelming question, "What can I do?" The first step is to consider that this may be the wrong question. While a sense of weighty responsibility is essential to galvanize action, think about how much more energy you feel when you hear the question: What brings you joy? This frame immediately moves people from generalities to specificity, from obligation to desire. "Does this bring me joy" is just one of a dozen right questions I suggest in my book *Delusional Altruism: Why Philanthropists Fail To Achieve Change and What They Can Do To Transform Giving*.

Three Simple Questions

Here's a fun exercise to begin a joyful process of discovery with your clients starting with three simple questions (if you know your client well, you may have some keen and helpful insights to share):

1. **What do you love to do?** Gardening? Public speaking? Convening people? Behind-the-scenes support? Teaching? Learning?
2. **What do you enjoy but could easily delegate?** Event planning? Communications? Finding the right collaborators?
3. **What do you hate doing?** Managing people? Engaging with the media? Solving logistical problems?

What you might immediately notice from the list above is that if you asked any given person the same questions, their answers would likely be entirely different. The love column for one person can easily be the loathsome activity for another. The beauty in this? As each of us steps up to help solve the world's most critical problems, we can do so in a way that gives us the most energy and joy.

I do this exercise every year. I recently realized that there were many communications activities I liked doing and could do—such as posting on social media—but that took too much time away from things that I enjoyed even more. I found I could easily delegate these tasks to someone else. I created an entire job description of the communications-related activities that I could delegate and/or disliked doing. Then I hired a marketing and communications firm to do them.

Now I spend more time doing things that bring me joy--like writing a book and helping philanthropists increase their impact--and less time posting about it.

Share the Joy

By being intentional about what gives us joy (rather than responding out of a sense of obligation), we stay engaged in the activities that matter the most. We can think more creatively about how to change seemingly intractable social problems. We become our best and most productive selves. And we can share that joy with others.

That doesn't mean philanthropy isn't hard. Being philanthropic can test our endurance and try our spirits. As philanthropists, we feel embarrassed when we recognize our unconscious discrimination. It's disappointing when your innovation is a flop. It's painful to support people who have just experienced trauma, such as the loss of a child or a natural disaster. It's hard to tell a nonprofit leader you aren't giving him a grant.

Growth Challenges

But these growth challenges are different from a daily grind that gives nothing back. Sometimes the joy gets squeezed right out of us with overflowing inboxes, people we don't like to spend time with and frantic year-end deadlines. On balance, though, your clients should feel dramatically more joy than frustration when it comes to their giving. When they reflect on their philanthropic efforts, whether it involves making public appearances, wrangling family members to agree on funding

priorities or the physical labor of building a school, delight should outweigh disappointment. They should feel overjoyed and not overwhelmed.

In this way, you can help your clients tap into a wellspring of energy, engagement and enthusiasm. You'll help create space for depth in partnerships and relationships while upping satisfaction and impact. And you'll experience the drastic difference between checking a box versus accelerating toward maximum impact velocity.

Kris Putnam-Walkerly is a global philanthropy advisor, speaker, and award-winning author. She recently published her second book, Delusional Altruism: Why Philanthropists Fail To Achieve Change And What They Can Do To Transform Giving (Wiley). Learn more at <https://putnam-consulting.com/>

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