



**By embracing a spirit of curiosity and humility, you can develop more effective strategies, make more impactful investments and build stronger partnerships that drive positive change in the world.**

## Chapter 8

# Keeping a Beginner's Mind

A beginner's mind means approaching experiences and situations as if you are encountering them for the first time, without any preconceived notions or judgments. The term is used in Zen Buddhism to describe a state of mind that is open, curious and free from biases, preconceptions or judgments.

Having a beginner's-mind approach allows you to be fully present in the moment, to see things with fresh eyes and to approach situations with curiosity. When you approach a situation with a beginner's mind, it is easier to learn because you are unburdened by preconceived notions or expectations.

Having a beginner's mind means:

- You are open to new ideas
- You have no expectations of yourself in terms of having insight
- You tend to view challenges and obstacles as opportunities for growth and learning
- You'll be more likely to accept input from all sources, particularly those with relevant lived experience

The concept of a beginner's mind can be applied to many areas of life such as learning a new skill, exploring a new hobby, visiting new locations or even when approaching personal relationships. You, too, can benefit greatly from having a beginner's mind.

# Why Having a Beginner's Mind Is Important for Philanthropy

Success in business or inheriting significant generational wealth is not a guarantee of success or expertise in all walks of life and can inhibit one's perspective in one way or another.

In the context of philanthropy, a beginner's mind can be particularly helpful given that donors who engage in substantial philanthropy often have a history of either success in business ventures or family wealth. Accordingly, having a beginner's mind can help you recognize your privilege, embrace community wisdom over your own, become aware of – and reduce – assumptions, and embrace so-called "failures" as a way of growing and learning.

## Recognizes Privilege and a Lack of Perspective

While some donors recognize their privilege and the power dynamics inherent in the philanthropic landscape, others may not be as aware. Recognizing one's privilege means acknowledging your systemic advantages and how these advantages can lead to unequal access to resources and opportunities. In the context of philanthropy, recognizing privilege means acknowledging the power dynamics between yourself and the communities you seek to serve, and understanding how these dynamics can impact the effectiveness and sustainability of your philanthropic efforts.

Recognizing this helps you to be more aware of your own biases and assumptions, and to approach your work with greater humility, empathy and openness to learning from those with lived experience. Recognizing your privilege can also help you to be more intentional about sharing power and decision-making with the communities you seek to serve, and to prioritizing initiatives that address systemic inequalities and promote greater equity and justice.

## Activates the Wisdom of the Community

Communities that benefit from philanthropy often have a deep understanding of their problems and the systemic challenges they face. This understanding comes from their lived experience and the knowledge they have gained through their daily lives and struggles.

Donors, on the other hand, may have a more limited understanding of the challenges faced by the communities they seek to serve, particularly if they are not deeply embedded in those communities or have limited personal experience with the issues at hand.

This is why it is important for you to listen with a beginner's mind to those with lived experience. As a result you will gain a more nuanced understanding of the issues at hand, and can partner to develop more effective and sustainable solutions. This ensures that your philanthropic initiatives are rooted in the needs and aspirations of the communities you seek to serve, and thus more likely to achieve meaningful impact.

## Inspires Creativity

A beginner's mind can inspire creativity. When you approach a situation with a beginner's mind, you are open to new ideas and possibilities, and are not constrained by preconceptions, assumptions or limitations of past experiences. By letting go of expectations and assumptions, you open up new avenues for exploration and creativity.

Those new avenues can and should be the communities and individuals who are closest to the challenges being addressed. Looking to community members for expertise can inspire more creative thinking by bringing together different perspectives, and foster a sense of collaboration and co-creation. Donors may bring a wealth of resources, networks and expertise to the table, while community members offer a deep understanding of the challenges they face and the resources and solutions that are most needed in their context.

By working together, donors and community members can also challenge each other's assumptions and perspectives, leading to new insights and approaches to problem-solving. This can help to overcome creative stagnation or entrenched ways of thinking, and encourage more innovative and adaptive approaches to social change.

## Encourages Even More Robust Thinking

By cultivating a sense of curiosity and wonder, and questioning assumptions and preconceptions, a beginner's mind can encourage deeper thinking about a given situation or problem.

This can lead to a more nuanced understanding of the situation at hand, and can uncover new insights and possibilities for action, encouraging a more reflective and intentional approach to problem-solving. By taking the time to examine the assumptions and biases that may be influencing your thinking, you become more aware of your own thought processes and make more informed and deliberate choices.

Fostering curiosity, questioning assumptions and promoting reflection and intentionality in problem-solving can lead to a more nuanced understanding of the situation at hand, and can help to uncover new insights and possibilities for action.



## Accepts Failure and Builds on Lessons

Because a beginner's mind is less attached to specific outcomes and expectations, you may be more willing to accept, and embrace, failure. If one looks at philanthropy as "risk capital," i.e. money that can be put at risk for innovative ideas, then the field is an ideal locus for experimentation and innovation.

Philanthropy often involves tackling complex social issues that may not have easy or straightforward solutions, so it is only natural that philanthropic initiatives may encounter setbacks or unexpected challenges along the way and might not always succeed in achieving their intended outcomes. If philanthropists are not comfortable with failure, they may hesitate to take risks or try new approaches. This can prevent you from addressing pressing social problems and limiting their impact. Moreover, by not learning from failure, you may repeat mistakes or miss out on valuable opportunities for improvement.

On the other hand, if you are comfortable with failure you can take a more experimental and adaptive approach to social change. You can be more open to trying new things, taking calculated risks, and learning from both success and failure. This approach can lead to more innovative and effective solutions that are more resilient and adaptable.

Accepting the potential for failure can help philanthropists build stronger relationships with their grantees and partners. By acknowledging and learning from failures, philanthropists can demonstrate humility, transparency, and a willingness to listen and adapt. This can foster trust and collaboration. Accordingly, having a beginner's mind makes it easier to recognize failure as an essential part of the learning process, which ultimately brings you closer to achieving your goals.

## Challenge of Maintaining a Beginner's Mind

The decision-making skills that have made someone successful in business may not necessarily translate to other areas of their life. For example, a CEO who is skilled at making tough decisions in the boardroom may struggle with making personal decisions that affect family or friends.

While there may be some overlap between the skills and traits that make someone a good leader in business and those that make someone a good leader in philanthropy, the two areas require different sets of skills and experiences.

For example, leadership in business often involves making decisions that benefit the bottom line, while leadership in philanthropy may involve making decisions that benefit society, a group, individuals or a particular cause. Business leaders may be skilled at managing budgets and resources, while philanthropic leaders may need to be more adept at working with volunteers, donors and community members.

Philanthropy often involves working with complex social issues that require a deep understanding of social systems, cultures and histories. A leader in business may not have the same level of expertise in these areas as someone who has spent their career working in the nonprofit or philanthropic sectors.

As noted earlier, a beginner's mind is one of openness to learning, increased creativity, improved problem-solving and even greater empathy because you approach others and their experiences with a non-judgmental attitude. This can help you better understand and connect with others.



Here are a few suggestions for inculcating a beginner's mind.

- **Get comfortable with being uncomfortable:** for many donors, being the person without information and being on the receiving end of teaching may be new and uncomfortable. Being ready for this dynamic can go a long way toward accepting it
- **Be curious:** approach work with a sense of curiosity and wonder, and ask questions that challenge assumptions and deepen understanding of the issues
- **Listen actively:** listen actively to grantees, partners and community members, and be open to new perspectives and ideas
- **Embrace humility:** acknowledge that you may not have all the answers, and that there is always room for learning and growth
- **Experiment and take risks:** experiment with new approaches and take calculated risks, and be willing to learn from both successes and failures
- **Reflect and evaluate:** reflect on experiences, evaluate their impact, and use this feedback to make continuous improvements and refine the approach
- **Collaborate and co-create:** deep partnerships with stakeholders can help co-create solutions that are informed by diverse perspectives and expertise
- **Continually seek out experts:** experts have specific knowledge or experience to ensure the latest thinking is part of your orbit

# Finding Experts

As noted previously, finding experts with more insight than you is instrumental in keeping a beginner's mind. Philanthropic donors can find experts in their issue area through a variety of channels:

- **Communities and individuals impacted:** those closest to issues are the best resource in terms of what the challenges are and potential solutions. Engage with them – being cognizant of the power dynamic – through community meetings, surveys, focus groups, grassroots organizations and individual outreach
- **Research:** online research including reports, studies and articles in their issue area are prime sources to identify experts and thought leaders
- **Professional associations:** reach out to professional associations and organizations in their issue area, and attend relevant conferences, workshops and networking events to meet experts and build connections
- **Referrals:** ask existing contacts, partners and grantees for referrals to experts in their issue area, and leverage their existing networks to find new connections
- **Online directories:** use online directories and databases, such as Candid, to find experts and organizations working in your issue area(s)<sup>29</sup>
- **Consult with advisors:** advisors, such as philanthropy consultants, can help identify and connect you with issue-area experts who can provide specialized knowledge

It's important for donors to keep in mind that finding experts is just the first step. You should approach your interactions with experts with an open mind, listen actively to their insights and recommendations, and look for opportunities to collaborate and learn from them.

<sup>29</sup> <https://candid.org>

# Incorporating Community Insights and Expertise

Even if you are committed to having a beginner's mind, there may be certain beliefs preventing you from putting grantees at the center of your grantmaking and fully relying on community expertise.

This can result in:

- **Loss** of control over the direction and outcomes of your philanthropic investments
- **Lack** of expertise based on the belief that community members may not have the technical expertise or specialized knowledge needed to effectively address complex social issues
- **Resistance** to change on the part of community members, or that they may not be open to new approaches or innovative solutions
- **Perception** that bias or conflict of interest could influence community recommendations or decision-making
- **Potential** difficulty in establishing clear accountability for outcomes and impact

Recognizing and addressing these fears is a necessary step on the path to fully benefiting from the beginner's mind, even for those donors who have already acknowledged the value and importance of community expertise in effective philanthropy.

You can address your fears about relying too heavily on community expertise in several ways, including:

- **Building trust** with community members by demonstrating your commitment to listening to, learning from and collaborating with them. This can involve actively seeking out community input and feedback, being transparent about decision-making processes, and following through on commitments.



- **Providing support** by offering resources, expertise and training to help them develop the skills and knowledge needed to effectively address complex social issues. This can involve investing in capacity-building programs, providing technical assistance, and offering mentorship and coaching.
- **Embracing diversity** by seeking out and engaging with a wide range of community voices and perspectives. This can involve investing in culturally relevant and responsive programs, supporting grassroots organizations and leaders, and partnering with marginalized and underrepresented communities.
- **Managing risks** through the establishment of clear guidelines and criteria for selecting and engaging with community members. This can involve conducting due diligence, setting clear expectations for accountability and transparency, and developing risk management plans.
- **Measuring impact:** donors can measure impact by establishing clear goals and objectives, collecting data and feedback from community members, and using evaluation and learning to continuously improve their philanthropic strategies. This can involve investing in monitoring and evaluation systems, building learning communities, and sharing results with stakeholders.

You can tap into the power of community expertise to achieve lasting social impact by addressing these concerns and taking steps to foster strong relationships with community members.

## The Stages of a Beginner's Mind



### The Strategic Planning Stage

Having a beginner's mind in the strategic planning stage for philanthropic donors involves approaching the process with an open and curious mindset, free from preconceived ideas or assumptions. This can involve:

- **Listening to community members:** start by actively listening to community members and experts in the field to gain a better understanding of the social issue they wish to address. This can involve conducting site visits, attending community meetings and engaging in dialogue with stakeholders.
- **Embracing experimentation:** embrace experimentation by trying out new approaches and testing innovative ideas. This can involve piloting new programs, collaborating with unlikely partners and taking calculated risks.
- **Seeking diverse perspectives:** seek out diverse perspectives by engaging with a wide range of stakeholders and experts in the field. This can involve consulting with academics, policymakers, grassroots organizations and community members from different backgrounds and perspectives.
- **Staying flexible:** stay flexible by being open to feedback, learning from failures and adapting strategies as needed. This can involve building in regular check-ins and course corrections, investing in monitoring and evaluation, and creating a culture of continuous learning and improvement.

A beginner's mind in the strategic planning stage of philanthropic investments brings donors fresh perspectives, creativity and a willingness to learn and grow. This can help to ensure that their efforts are grounded in community needs and are effective, sustainable and impactful over the long term.



## The Operational Stage

Having a beginner's mind during ongoing operations involves approaching your work with an open and curious mindset, even as you become more familiar with the social issue you are working to address. This can involve:

- **Staying connected to the community:** donors can stay connected to the community they are working with by regularly engaging with community members, seeking feedback on their work and ensuring that their programs are meeting community needs. Meaningful engagement, as in ensuring co-creation, co-evaluation and community decision-making, is key.
- **Encouraging innovation:** encourage innovation by creating space for experimentation, supporting new ideas, and fostering a culture of learning and improvement. This can involve providing funding for research and development, investing in new technologies, and collaborating with other funders to test out new approaches.
- **Embracing diversity:** donors can embrace diversity by seeking out new perspectives and engaging with individuals and organizations from different backgrounds and experiences. This can involve partnering with organizations that serve underrepresented communities, investing in programs that promote diversity and inclusion, and providing opportunities for community members to have a voice in decision-making.
- **Fostering collaboration:** foster collaboration by building partnerships with other organizations and funders, sharing resources and knowledge, and working together to achieve common goals. This can involve participating in joint ventures, co-funding initiatives and collaborating with other philanthropic organizations to leverage their collective impact.

By maintaining a beginner's mind during ongoing operations, philanthropic donors can remain open to new possibilities, continuously learn from their experiences and stay connected to the needs of the communities they are serving. This can help to ensure that their efforts are responsive, adaptable and sustainable, ultimately leading to greater impact and positive change.



## The Impact Assessment Stage

Keeping an open mind in the assessment and measurement stage of philanthropy involves being willing to challenge assumptions and consider new information about the effectiveness of the philanthropic initiatives.

This can involve:

- **Measuring what matters:** keep an open mind by focusing on outcomes that matter to the community they are serving and being open to feedback from community members about what is working and what is not. You should consider culturally responsive evaluation when appropriate.
- **Embracing learning:** you can embrace learning by seeking out diverse perspectives, investing in research and evaluation, and being open to feedback in the evaluation process from grantees and other stakeholders. This can involve creating opportunities for shared learning and reflection, encouraging feedback and continuous improvement, and being willing to adapt and refine strategies as needed.



- **Being transparent:** you can be transparent by sharing results and learnings with others in the field, including other funders, grantees and community members. This can involve publishing evaluation reports, sharing data and outcomes with others, and engaging in public dialogue about the effectiveness of initiatives.
- **Promoting innovation:** promote innovation by experimenting with new approaches to assessment and measurement, such as using new technologies, exploring different evaluation methods, and collaborating with other funders to develop new models of assessment and measurement.

By keeping an open mind in the assessment and measurement stage, you can gain a deeper understanding of the impact of your initiatives, identify areas for improvement and ultimately improve the effectiveness of your philanthropic investments. This helps to ensure that resources are being used in the most effective and efficient way possible, leading to greater impact and positive change.



# Systems Change

For donors seeking to engage in systems change, keeping a beginner's mind involves being open to new and different ways of thinking about complex issues, embracing uncertainty and ambiguity, and being willing to challenge long-held assumptions and beliefs.

Here are some ways that donors can maintain a beginner's mind when engaging in systems change:

- **Focus** on the root causes of social problems and be open to new ideas and approaches that address systemic issues. This requires being willing to learn about and understand the complexities of the systems that contribute to the social problems you seek to address.
- **Build** relationships with diverse stakeholders, including those who are most affected by the social problems you seek to address. This involves listening to and learning from community members, grassroots organizations and other stakeholders to understand their perspectives and experiences.
- **Embrace** experimentation and be open to trying new approaches to systems change. This may involve investing in innovation and taking risks, even if there is no guarantee of success.
- **Foster** collaboration among stakeholders by creating opportunities for shared learning and dialogue, encouraging feedback and continuous improvement, and building coalitions and partnerships that leverage the strengths of diverse stakeholders.
- **Be humble** in approaching systems change by recognizing that you do not have all the answers and that success requires the collective efforts of many stakeholders. This means being open to feedback, being willing to adapt and change strategies as needed, and acknowledging and learning from failures.

By maintaining a beginner's mind, donors can be more effective in driving systems change by being open to new perspectives, ideas and approaches, learning from their own experiences and failures, and continually seeking to improve their strategies and impact.

## Conclusion

A beginner's mindset is invaluable for any philanthropy because it emphasizes openness, curiosity and humility. When approaching philanthropic work with a beginner's mind, donors are more likely to listen and learn from the communities they aim to serve, avoid assumptions and biases, and remain open to new ideas and approaches.

This in turn enables philanthropists to maximize their impact and ensure that their resources are used as effectively as possible. Therefore, embracing a beginner's mind can lead to more successful and fulfilling philanthropic endeavors that make a meaningful difference in people's lives.

# Fund for Shared Insight – The Transformative Power of Listening in Philanthropy



Effective listening is a crucial tool for any philanthropy; listening to a diverse range of perspectives helps bolster impact and engagement with communities served. The Fund for Shared Insight (“Shared Insight”) is a national funder collaborative seeking to improve philanthropy by promoting high-quality listening and feedback in service of equity.<sup>30</sup> Shared Insight promotes and supports ways foundations and nonprofits listen and respond to the people and communities most harmed by the systems and structures they are seeking to change.

## The Need for Effective Listening

In 2013, the Hewlett Foundation wanted to deploy resources to better the field of philanthropy. It joined with eight foundations that were interested in this work and created a funder collaborative. “They agreed that foundations are not particularly good at connecting with the people and communities most impacted by systemic racism and structural inequities, nor in acting on what they hear from those people and communities,” says Fund for Shared Insight Managing Director Melinda Tuan. “We in philanthropy are often so far away (literally and figuratively) from the people and communities ultimately being impacted by the work that we fund. So that was the problem the collaborative decided to focus on.”

Tuan states that at the time most funders agreed it was important to listen, but there was little focus placed on being equity-centered in that conversation.

<sup>30</sup> <https://www.fundforsharedinsight.org>



Fund for Shared Insight became a fiscally sponsored project of Rockefeller Philanthropy Advisors in 2014 and decided to focus on feedback practice among nonprofits and foundation openness. Shared Insight centered their work around the importance of creating effective feedback loops. An effective feedback loop involves soliciting feedback from communities engaged, but then also doing something with the information learned. The racial reckoning that occurred in the US after the murder of George Floyd propelled the work of Shared Insight, pushing funders to engage with the different populations that are most impacted by philanthropy yet least consulted in their efforts.

## The Challenge of Effective Listening

The Fund for Shared Insight has noticed that building the muscle around effective listening is challenging and requires dedicated effort from funders. "In our work, we've seen funders point to resource allocation as a main barrier to our services. Funders need to be willing to invest money and time into building out their capacity to listen," says Tuan. "Whether it's hiring people who have lived expertise onto their staff, incorporating feedback into their grantmaking process, or shifting the way their strategies are developed, all of this requires an openness to change and actual action."

Being a good listener requires vulnerability and the ability to accept hard feedback. However, when funders are able to overcome these challenges, they see incredible results in their pursuit of equity.

## Results of Effective Listening

Shared Insight has tangible examples of funders enabling their nonprofits to listen, hiring people with lived experience and employing participatory grantmaking efforts to shift and share power with community. Shared Insight has seen that when funders dedicate the necessary resources to effective listening, equity spreads throughout their organization and their grantee organizations. Funders that invest in this work are more likely to build better relationships with the communities they serve, which ultimately results in greater impact, more resilient grantee organizations, and increased equity and diversity of thought.

Fund for Shared Insight has seen that better listening encourages people to be more vulnerable. This process helps funders be open to all that they are learning and to offer grace to each other. Without being open to listening, it is nearly impossible to create an inclusive culture that promotes change.

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