

Creating Caring and Capable Boards

Reclaiming the Passion for Active Trusteeship Interviews and Photographs by Cathleen Roundtree

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Chapter Three

What Does It Mean to Hold in Trust?

The ability to hold someone or something in trust, to give to someone else or to give something of who we are and what we have, comes from our own experiences of being held in trust. Over time these experiences influence the development of certain beliefs and perceptions about our value and worth and the value and worth of others. The first is a belief that we are in relationship with and to others and that the stranger is a part of who we are and is a part of our world. This belief helps us to remember our common humanity and to perceive our differences as aspects of a whole rather than as disparate elements threatening our identity. When we see ourselves as being in relationship with and to one another, we can begin to embrace differences and be more creative in our efforts to connect and communicate with those who appear to be unlike us or who perceive things differently.

The second is a belief that something bigger and greater than self exists and that in some important way we belong to and are in service to a larger purpose. This belief helps us to have a broader, more communal view of a complex world and enables us to develop an ability to forgo impulsiveness and delay immediate gratification. The belief that we are tethered to something bigger than we are can embolden and encourage us and help us to face adversity.

To believe in something or someone greater than ourselves nurtures hope and purpose in our lives and gives meaning and purpose to the lives of others. Faith in the existence of something good and greater than ourselves, something transcendent, helps us to remember the significance of the spirit in our individual and corporate lives. We need more than mastery of techniques and tasks in leading and serving; we need the exploration of mystery, of the meaning of our lives and work. This may occur through religion, great books, ideas, relationships, conversation, art, music, and social movements. Whatever the source that inspires the journey, it can lead to a deep knowing that connects us and calls forth the giving of self.

The third belief is that giving transports us into a larger realm and into a cycle of generativity. We find ourselves members of a circle of ever increasing generosity from which abundance is created. In order to give to another, we must feel in possession of something to give. The acknowledgment of having something to give is an experience of abundance, and the sense of abundance helps to create conditions for the development and experience of community in which sharing with the stranger is part of the culture. Some of the most powerful times in our lives are when we have been genuinely and authentically given to by another individual who cares for us and in whom we have placed great trust. These are frequently persons who have had tremendous authority over us for example, teachers, parents, friends, bosses, colleagues, or clergy. Our being cared for by them is an experience of being in a deeply mutual and respectful relationship.

experience of being held in trust.

The experience of being held in trust is one of being both vulnerable and empowered, of being uncertain and confident, of being guided through important life transitions and difficult life passages, and then emerging stronger and more integrated. Our capacity to give to and invest in someone or something else is seeded in relationships of trust holding. Our sense of self is conceived and subsequently shaped in these relationships of trust; this is where we learn who we are, where our perceptions of the world are formed and later redefined, and where our place in the world is revealed in time.

These initial and formative experiences teach us whether and how to trust. We take from our first caregiving relationships fundamental assumptions and beliefs about ourselves, others, and the external world. These assumptions and beliefs affect our perceptions, our capacity to form relationships, our interpretations of reality, our choices and actions. If we learned through experience that most people are responsible and trustworthy individuals and that all of us are vulnerable to adversity sometime in life, our behavior toward someone going through difficult times will be influenced by these perceptions. If we encounter a homeless stranger begging for money, our response will likely be one of empathy and compassion with a desire to alleviate the suffering in some way, whether through an immediate gift or some form of social advocacy or policy change. But if our belief is that most people are irresponsible, untrustworthy individuals out to exploit others and looking for the easy answer, then we will see the same situation with a different lens. The perception of the homeless stranger might well be that of an irresponsible and lazy street beggar whom we would be tempted to judge critically, ignore, give advice to, or admonish.

Our beliefs indeed shape what we see and ultimately how we behave. We draw conclusions from our experiences and apply them to situations we encounter. In subtle and obvious ways, we are being formed by what we are able to see.

New experiences and conscious choice can cause us to question, challenge, and change our perceptions. Reflective analysis of our past is an evocative and enlightening way we can come to know how much of who we are now has been influenced by our experiences with others. Michael, now an administrator in a large mental health system, remembered a high school teacher who recognized his love of music and encouraged him to persevere in mastering an instrument through an especially difficult time in his personal life. Never pushy, the teacher gently urged him to persist and supported disciplined preparation and practice. Michael recalls, There was never a sense that I was being scripted or coerced into developing my artistic talents; instead I had a sense that something something that even I didn't fully know yet was being called forth and being given room and permission to grow. The practices inspired by this teacher and in which he had engaged shaped Michael's love of music. The discipline, focused passion, sense of responsibility, and joy this high school teacher engendered within him remain with Michael today and are reflected in his life and work. The teacher who held him in trust helped to equip Michael to succeed as a supervisor of professional counselors who work with troubled individuals and as a high-level administrator in a large mental health organization. Michael realizes the influence he now has on the caregivers and on the system of health care. To him, his position is a way to give what was given to him as a young adolescent: focused passion, discipline, responsibility, and joy. Being held in trust both enabled the growth of his capacity to hold in trust, and nurtured and obligated him to ensure the development of others who will share the capacity to hold in trust.

Holding someone or something in trust is a reminder of the significance of relationships and the value of self-discovery and definition in our lives. In the experience and exercise

of trust holding, we are initiated into powerful streams of giving that move us along and strengthen and reinforce our responsibility to and for one another. Being held in trust prepares us for giving and introduces us to the reality of the other and the responsibility we have to come to know and embrace the stranger.

To come to know the stranger and the stranger's needs brings us to an awareness that there are needs beyond those of our own for which we have a responsibility and an obligation. When we can recognize and respond to the needs of another, we participate in a legacy of giving that recognizes the gift of receiving. We become the carriers of a legacy of abundance and generosity, a legacy initiated by and reinforced through practices of trust holding. The experience of being held in trust is one of being the recipient of a gift that needs to be shared with another. Preparation for trusteeship, whether of an individual or an organization, involves assisting them in the recovery of their experiences of giving and relationships of trust holding, and to connect these remembrances to their current responsibilities of governance leadership.

Leaders who hold others in trust are individuals who have been held in trust themselves; through their use of self and service, they have kept the gift given to them moving in ways that have enriched the development of other people, the performance of organizations, and the quality of community life. The capacity to hold in trust requires the sharing of self in a trustworthy manner so that the gift of service contributes not only to self-development but also to a greater good.

Becoming an independent, separate person, capable of establishing relationships of trust, functioning competently, seeing the complexity of life while retaining a core sense of self, and having a healthy sense of connection with something greater and larger than one's own being and of caring for others are the hallmarks of healthy adults. All of these qualities and abilities emanate from experiences of trust holding. When we have been the recipient of trust holding, we can understand both the value and limitations of individualism and the common good; perhaps more important, we are able to integrate rather than separate them. We can then better achieve a balance between them in our lives, our leadership, and our service to others.

A way to begin to identify and claim these capacities is through identifying the associations we have to the phrase to hold in trust. When I have asked individual leaders and those with governance responsibilities to do this, their initial responses are halting but soon turn into a tumble of words, phrases, and images: mentor ... parent ... supplicant hands ... fiduciary ... nurture ... protect ... commitment ... balance ... holding a candle ... cradling a baby ... holding a baby bird ... believing ... responsible for the future ... accountable ... stewardship ... integrity ... security ... for the future ... continuity ... caring ... parenting ... involved ... patience ... authentic ... dependable ... courage ... love ... respect ... confidence ... knowledgeable ... compassionate ... challenged to do the best ... seeing the unrealized potential in me. These words and phrases are doorways to personal stories that collectively provide a verbal portrait and a terrain of trust from which individual character is formed. Participants are asked to recall a time when they were held in trust and to answer several questions: Who held you in trust? What did they do? How were you affected by what they did? By who they were? What were the qualities and characteristics of those who held you in trust? After some time for individual reflection, participants gather in small groups to share the answers to these questions. Later in whole group discussion, I typically ask if they now have other associations to hold in trust, and what appeared to be a comprehensive list expands to include new words, phrases, and associations that convey the more deeply personal and relational aspects of having been held in trust.

Susan, a woman in her early forties, recalled her relationship with her mother, who strongly believed in Susan's abilities even as Susan doubted them. As a young adolescent, she approached leadership and service opportunities with reticence, but her mother's quiet yet persistent confidence in her provided Susan with a safe emotional space to risk trying new things. Susan recounted numerous projects she took on with her mother's blessings and belief she could do it. Over time the trust her mother had in her took root and grew. Her desire to do for others became her own, and the opportunities given to her seeded her own passion to make sure that other young women have opportunities to succeed. Susan is now a staff member and leader in an organization dedicated to this end. The trust holding she received as a young girl is now a gift she gives to her colleagues, board members, program staff, and the young women served by her organization.

This story is an example of how the experience of being held in trust can be the inception of a calling and can influence important life choices. A colleague, Jim, speaks eloquently of a treasured friendship that began in adolescence with a family friend and businessman who became a priest later in life. This friend was someone with whom Jim could share his hopes and concerns, his aspirations and fears. It was this friend who enabled Jim to call forth his deep yearning for a life of service to God and to discern his calling to be a priest in the Episcopal church. Jim served in several positions before becoming the rector of a prominent urban parish, where he remained for nearly twenty years. During his tenure, he created a community of worship and spiritual nurture for many accomplished community leaders who were seeking meaningful and responsible ways to serve the greater community. His experience of being held in trust not only evoked Jim's own calling but enabled him to help others to determine and express their vocations. Jim is now the leader of a theological institution whose mission is the preparation of clergy and lay leadership.

Recalling times of being held in trust can be an emotionally powerful experience; we are reminded of a time when someone accepted, understood, and cared enough about us to invest of themselves, their time, and other resources and enabled us to reach new levels in our personal and professional lives. The remembrance of these relationships brings forth a sense of thankfulness and gratitude for the gift received, and the gratitude brings with it the sense of obligation to give back to others. It calls forth a sense of duty that is absent of debilitating shoulds and ought to's that originate from a sense of scarcity. To live as though we are truly connected to and in relationship with strangers creates a very different sense of responsibility and community. From this connection we learn that accountability brings freedom and that loss and sacrifice bring renewal and growth.

Effective trusteeship blends caring and competence, connects altruism and authority, and evolves from the generous act of being held in trust to the experience of being given to. Being held in trust is a profoundly personal experience that shapes individual and organizational character and behavior. In the cycle of giving, its influence is felt collectively and culturally. Institutional and personal exploration of what it means to be held in trust and to hold in trust helps those who assume a position of leadership in the not-for-profit sector to make important connections between the private and public realms of life, and to lead with integrity and authenticity.