

JOSEPH LUMARDA

“Life Lessons: Making a Trust-ee”

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Joseph Lumarda, currently Senior Vice President with Capital Guardian Trust Company, was for sixteen years with the California Community Foundation in Los Angeles, first as a Program Officer, later as Vice President for Development, and still later as Executive Vice President. Writing here as a laborer in the philanthropic vineyard, Lumarda describes the moment that he was transformed by feeling the weight of his vocation. The “life lesson” he learned at that privileged moment was about the meaning and importance of trust, or more precisely, about what it means to be entrusted with someone else’s hopes and dreams – what it means to be, as Alfred Nobel’s chief executor once called his role, “the vicar of the soul.” Toward the end of his essay, Lumarda raises the large question that his experience and insight prompt: “How do we create foundations, institutions and cultures that reflect the personal and public trust required of us?” How do we put “trust” back into “trusteeship” and inspire the next generation of philanthropic leaders? Can Lumarda’s report of what he learned from “Frank” do for others what Frank did for him?

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There are moments in life when it all becomes clear. The jargon melts away. The strategic plans take second stage. All the meetings become moot. In terms of my personal roles in philanthropy (as trustee and professional), what motivates me and what got me where I am today, one distinctive moment with a special person comes to mind.

Several years ago, I was sitting across a kitchen table with a future donor to the California Community Foundation. We were going over the details of his philanthropic plan. Frank was a self-described small businessman, inventor, tinkerer and “string collector.” This was a modest self-description for someone who built up an estate of more than \$20 million.

Frank also liked to tinker with his arrangement with the community foundation. After our initial meeting, he would call me up almost monthly to see if we could “Go over this thing one more time.” At this particular meeting (the last one we would have) we sat across from each other at his kitchen table surrounded by open books, half-done sculptures and other projects “in process.” His breathing was labored and assisted by a stream of pure oxygen fed to him by nose-tube.

We’d been here before, but his time it was different. He usually leaned over our papers, fiddling with words or asking for my definition (and the community foundation’s) of a particular concept. On this morning, he sat back and asked me to describe in detail what would happen,

“When I kick off and this thing kicks in.” This was the first time he wanted a presentation without interaction or questioning. I covered all the points, emphasizing both the concepts and details that we had struggled with over the past several months. His eyes, though half closed, held me throughout. After I finished and sat back in my chair, he closed his eyes and leaned his head back for what seemed to be a very long time. I hoped he wasn’t falling asleep.

As my anxiety began to mount, his head snapped forward. We stared at each other for what seemed like an eternity. “Thank you, Joe,” he said. This was the first time I’d heard those words. I nodded my head with what must have been a quizzical expression.

He leaned over the table, placed his hand firmly on my forearm and squeezed. He then said words I will never forget, “*I guess you’ll be me—when I’m no more.*” When a donor says something that harkens the specter of death, I often come back with a dispelling quip—but not this time. Instead, I responded “Yes sir, I will. We will.” After a few minutes of sipping our tea in reflective silence, Frank proclaimed, “Now get out of here, young man, I have work to do!”

Frank died about a month later. His estate created a fund at the community foundation that provides scholarships for disadvantaged youth pursuing vocational training. He never went to college and wished to support kids who “Liked to work with their hands.” He chose the community foundation because his fund would not be tied to any one institution and would be free to support the best programs to meet his philanthropic vision.

“*I guess you’ll be me—when I’m no more.*” By this Frank might have meant that he expected me to be like himself in the years to come—wise, inventive, entrepreneurial, risk-taking, stubborn, curious, and humorous. Sure, I wish I—I wish all of us at the community foundation, indeed in all foundations could become so. But at the time I heard it as a plea, as a hope, and above all, as a longing for trust. He wasn’t so much asking me to become his double as he was entrusting me with *his* mission. He was, very literally, making me his trust-ee—the eyes, ears, and spirit of his philanthropic mission. No doubt the circumstances in which we conversed conspired to make me especially alert to his meaning, but I suddenly realized—really for the first time—the awesome responsibility that being a trustee entails. And it forever changed the way I look at my role in philanthropy.

Yes, we are in our positions at foundations in order to provide support to nonprofit organizations, which we hope will improve society and cause positive social change. Yet, we are primarily here to fulfill trust—personal trust, institutional trust, public trust. One can go to schools, conferences, and institutes to learn about the science and politics of grantmaking and social change. But where does one train future workers in the philanthropic vineyards to secure and ensure trust?

Frank trained me. “*I guess you’ll be me—when I’m no more.*”

My immigrant housekeeper and gardener parents prepared me. “*Work hard. Be nice. Pray often. Tell the truth.*”

The convent and order of nuns my parents worked for and dedicated more than forty years of their lives to helped me. “*There is more to this world than what you see. Dedicate yourself to something beyond yourself.*”

A very special United States Marine Corps drill instructor also helped me. *“At the end of the day, can I trust you scumbag future officers with a \$50 million U.S. Navy aircraft? More important than that, can I trust you with my life?”*

And my friend, teacher, and mentor the late Peter Drucker instructed me, as well. *“Question everything. Strip away all assumptions. What you have left is the truth and the essential elements of innovation.”*

The issue of trust begs the question: How do we create foundations, institutions, and cultures that reflect the personal and public trust required of us? We have the laws, regulations and guidelines that guide our public trust and accountability (just ask the IRS, the Senate Finance Committee, and states’ attorneys general). However, this is just the first level of legal and ethical leadership and accountability.

Beyond this, do we have the wisdom, the experiences, and, at times, the history and stories to help us fulfill the historical and moral trust given to us by the donors and founders of our foundations? How do we reach a level of accountability and leadership that inspires us to act with integrity and constancy, whether the donor is with us or not? I reached this level through Frank’s firm yet hopeful gaze and words, *“I guess you’ll be me—when I’m no more.”*

Who are the foundation trust-ees of the future? In what training ground will we find them? Good managers? Thought leaders? Change agents? Maybe we should ask the Franks of this world. Maybe we should ask *you*: Who would you trust with your memory and agency? Who would you trust to be you—when you’re no more?

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