

*The well-being of a community of cooperatively working beings is the greater
The less the individuals demand the proceeds
Of their work for themselves
Or, in other words,
The more they make over these proceeds to their co-workers
And the more their needs are met not by their own work
But from that of others.*

—Rudolf Steiner, author. Repeated in unison by attendees at opening of
2009 Mid-States Shared Gifting Meeting, Viroqua, Wis.

Mid-States Shared Gifting: A Circle of Generosity

By Merrily Helgeson

Waldorf schools teach creativity, community and cooperation. They teach that human beings are much more than the money they make and spend.

How, then, are school leaders to handle it when they are required to compete against each other for money? For Waldorf school leaders in mid-America, Elise Ott Casper's generosity created a learning experience that has led to an understanding of how the human transaction of exchanging money can lead not to discord but to understanding.

It was not an easy thing to learn, said Candyce Sweda, a Detroit Waldorf School administrator who advises the Mid-States Shared Gifting Program, the fund that Casper created. "This isn't something that comes naturally to people," she said. "I think for everybody it's sort of a threshold to go beyond the competitive model to the cooperative model."

RSF Social Finance, San Francisco, is the mission aligned steward of the funds. John Bloom, who supervises the Mid-States Shared Gifting Fund at RSF Social Finance reflects on what it means to convert greed to generosity.

"Western money culture, the world in which we live, and the context in which RSF operates, has to work very hard to reinstate a sense of gift culture, a sense that has been overshadowed by the rise of materialism and the accumulation of wealth," Bloom wrote in an essay titled "The Social Heart of Generosity."

"Many indigenous cultures world-wide still practice a gift culture, especially where the community has remained intact. In those cultures, no one lacks for food or shelter. They are generally cultures that have an awareness of the inter-relationship of all aspects of

life that leads to a feeling of abundance, as opposed to the constant refrain of ‘never-enoughness’ so prevalent in our present culture.”



Mid-States Shared Gifting conferences start with an exchange of stories. Individual schools’ problems, triumphs and wishes are shared.

Shared gifting

The money these Waldorf schools must divide up has been granted annually since 1995 in amounts ranging from \$25,000 to \$60,000. Under the terms of Casper’s bequest, it must go to no more than 12 Waldorf schools from throughout the Mid-States region, which she defined as the watershed of the Mississippi River: Wisconsin and Minnesota south to Texas and New Mexico, east to Ohio and Tennessee, and west to Eastern Colorado and Montana.

For schools running on perpetually tight budgets – tighter in the current economic downturn – this free money is worth some effort. And, yet, the people who have participated end up saying that the money is the least beneficial thing that comes from the annual Mid-States Shared Gifting gatherings.

Mid-States Shared Gifting at its current stage of evolution works like this:

1. Participating schools submit budgets, narratives describing how the past year has gone, and a grant request, being specific about how the Shared Gifting money would be spent.
2. Through meetings over three days at one of the schools, participants get acquainted or get caught up with each other. They read each other’s budgets

- and reports and hear presentations on each grant request. They work together through educational exercises, eat together, play, sing and even dance together.
3. On the third morning, the advisory group tells the gathering how much money will be granted that year by the Mid-States Shared Gifting Fund. Total requests almost always exceed the amount given, so school representatives begin by paring down their requests. Gathered in a single room and working as a group, they work quickly and cooperatively to bring their grant requests within the given budget. Then comes the truly innovative part.
 4. School representatives begin giving money to each other. From a school in Detroit might go \$500 to a sister school in Austin, Tex. Ann Arbor might donate \$300 to Milwaukee. Minneapolis might give \$500 to Cincinnati. And Cincinnati might give \$500 back to Detroit. With each gift comes a comment about why it's being given, and why the recipient deserves the money. Because, by this point, all the participants know and can speak to each others' hopes and needs.

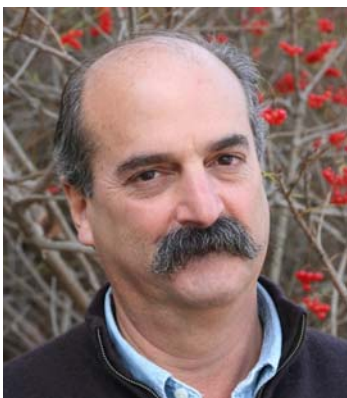
The end result, each year, is that a few school representatives leave with more money than they asked for, while most leave with a little less. All, however, have been through an experience that most find transforming.

"It seems to be about money but it is a pool of sharing our thought, ideas, just a chance to talk with each other," wrote one participant in 2006.

"This creates a spiritual grid amongst the schools that connects us throughout the year," wrote another.

"We keep injecting other schools' situations into our school's consciousness throughout the year. This year I told my colleagues, 'we need to send energy to Detroit just as much as we need our own help.'"

"This process totally transforms something that is inherently competitive. We begin giving, and give more, until this spirit of giving is actually there."



John Bloom

foundation of community."

From a strictly practical standpoint, the Waldorf schools are benefitted by all this face-time, Bloom said.

"Geographically, they're pretty spread out, and the schools are always in different stages of maturity," Bloom said. "Just meeting face to face and operating in a community of trust, where they can actually share the strengths and weaknesses, that builds a trust relationship, so that if one school has a need, there's no hesitancy in picking up the phone and calling.

"The relationships are warm and more fluid, and they're based on a common understanding. To me, that's the

Beyond this, though, there seems to be a more mysterious dimension. What happens when people give each other things, particularly when they deliberately shift focus from getting to giving? Our society commonly posits greed as our most powerful motivation, but what if it's generosity that actually makes the world go around?

The human nature of money

Questions about the basic role of money engaged Casper, Bloom said.

"Elise was a researcher, and she wrote and thought about the role of money. She also practiced the whole notion of self-development and reading (Rudolf) Steiner's work, and trying to see how it could benefit the world.

"Steiner looked at money in quite an innovative way. He said there are actually three kinds of money. Purchase money goes to buy things; it's a trade exchange. Loan money creates a relationship between the lender and borrower that lasts for the life of the loan. The third kind is gift money, and it has a relationship to the whole economy because it creates future capacity. When you give a gift, you don't know what's going to happen."



Elise Ott Casper

Another aspect of this, Bloom said, is the role played by surplus capital. "What Steiner said was that surplus capital is a wonderful thing. But if that capital is owned by an individual and gets put into land, for instance, the money actually stops moving and gets stuck in the land, leading to an incredible appreciation of land value. The rightful use of surplus capital is actually reinvesting in the cultural sector, in renewing human capacity. We won't have a living economy unless we have people who are being educated in such a way that they understand what it takes to be an entrepreneur – to have tools and the capacity to organize around that, that's what an education is for.

"I think Elise was very involved in the giving process. She knew how important it was to get the money back into the cultural sector."

Steiner's ideas about money might have been of particular interest to Casper because she'd grown up in a wealthy family. She was a Milwaukee heiress; her mother's family owned breweries, her father's a chain of grocery store. Most of the \$7 million that created the Mid-States Shared Gifting Fund, however, came from an insurance settlement that resulted from the car-accident death of her son. "She felt that this was money she had to do something special with," Bloom said.

Casper began her own philanthropy with the help of a few friends. Waldorf schools, which are founded on philosophical insights of Rudolf Steiner, were an early focus. To help her make funding decisions, Casper brought in advisors. Candyce Sweda was one.

“When I came into the group, there were four advisors and I made a fifth,” Sweda said. “She wanted a liaison between the fund and the schools groups.”

After her death in 1997, Casper’s friends transitioned to a more formal role. They now serve as a board of Advisors to the fund, reviewing grant applications and helping direct the fund’s activities.

Sweda believes Casper’s search for a more constructive form of philanthropy had come partly from what she had seen as a child.



Candyce Sweda

“It was the way she saw her parents involved in giving away money,” Sweda said. “They were wealthy, and people would come to them and ask for gifts. It always felt like a begging situation to her, a kind of groveling. She didn’t like that. So when she received the money she did, her way of working with that was to appoint advisors. She would sit with them and ask ‘Who do you know who needs money?’ Anyone they thought worthy would go into the pot. Once a year they’d look and decide who got money.”

This, though, made participants uneasy. “It placed groups in the position of competing with each other,” Sweda said. “Out of everybody acknowledging that this wasn’t the way they wanted to work, we began trying to find another way. I was involved in the first experiment when they did this. They did send out a couple of messages to try to nudge the groups into an understanding of what their job was. We wanted them to try collectively to figure out how to meet those needs.”

The first time that Mid-State Shared Gifting participants were gathered into one room and asked to divide the money among themselves, the results weren’t pretty.

“That first meeting was pretty brutal,” said Sweda. “Everybody was highly competitive and had a very judgmental approach: ‘Why is that important?’ ‘What I need is more important than what you’re talking about.’ Everybody was individually advocating for their own projects.

“It took maybe four or five years before you had anything even resembling the spirit of what is there now. It took several steps for the advisors to learn that there needed to be a lot of study to advise the group. There needed to be more time. You couldn’t be worried about catching a plane in five hours.”

Taking (giving) time

In November 2009, Mid-States Shared Gifting participants gathered in Viroqua, Wis. They began arriving Thursday evening, worked together all day Friday and Saturday, sharing many meals and socializing. Finally, on Sunday morning, they tackled the work of divvying up \$30,000.

Most of the participants knew each other from earlier conferences. This is by design, and is laid out in the Fundsharing Group guidelines: "There is an expectation that the same individual within the school will carry the Fundsharing work on behalf of the school for as long as possible to provide continuity."

With familiarity came candor. School administrators boasted of former students who had returned as teachers and of higher-than-expected enrollments, but also described budget deficits, wage concessions and controversies. One said her school had recently made staff changes to remedy a period of "chaos and lunacy." Another joked that her school had been recovering from an "adolescent break."

Fortunes varied. Austin, Tex., reported record high enrollment after it had prepared for a 10 percent budget cut, while Detroit described efforts to rebound from a staggering deficit. All schools had prepared for recession-driven enrollment decreases, and most had experienced them. Nevertheless, Bloom noted approvingly, the schools were raising \$1 million a year on a collective budget of \$26 million, and only one school had budgeted a deficit.

Budget information was freely shared. Schools had been required to complete detailed budget spreadsheets, so that all could see each others' comparables. Despite budget summaries being squeezed into small type onto a single large page, participants asked for more next year: enrollment and tuition by grade level, totals and averages in all categories.



Shared games helped build community.

Wish lists

Gifts that come from this group retain a certain aura, the school representatives said.

Jean Kacanek, administrator of Tamarack Waldorf School, Milwaukee, said she thinks of the Fundsharing group every time she sees the 10 identical sewing machines that replaced the aged and haphazard collection used in her eighth-grade's unit on the Industrial Revolution. "They have such a physical presence in that room that they just seem to vibrate," she said.

"One year, we requested music chairs, and when the chairs come out, I always mention how we got them," said Geralyn Sparough, Faculty Chair at The Cincinnati Waldorf School. "We're creating a network," she said. "This group has created its own set of lay lines in the middle of America."

Projects that will be touched by the fund during the next year include:

- An English-style woven wattle fence to prevent children from wandering into nearby woods at Four Winds Waldorf School, Warrenville, Ill.: \$2,700 requested, \$1,800 received. Administrator Marianne Fieber said faculty and parents had chosen this design as something they could build themselves, using materials

from their own forest. The grant will be used to pay a master fence-builder to supervise.

- Ventilation equipment for science classes at Minnesota Waldorf School, Maplewood, Minn.: \$2,500 requested, \$3,100 received. Development Director Liz Lacey-Gotz said more fundraising will be done to help pay for portable science hoods to safely handle chemical fumes.
- A series of films and community discussion groups at Detroit Waldorf School: \$5,000 requested, \$4,100 received. Administrator Linda Brooks said the program is aimed at “outreach and parent education efforts as a strategy to increase and retain students and form critical community partnerships.” Detroit is struggling to keep enrollment up and tuition affordable in the city hardest-hit by the recession. “We have a commitment to be in Detroit, and we’re going to stay,” Brooks said.
- Plumbing and two sinks for Tamarack Waldorf School, Milwaukee: \$2,500 requested, \$3,000 received. Administrator Jean Kacanek said the school’s aging building has no running water in third-floor classrooms, so seventh- and eighth-grade science classes have been carrying water upstairs in buckets.
- Support for a business project to “create a sustainable income stream” for Pleasant Ridge Waldorf School, Viroqua, Wis.: \$5,500 requested, \$6,400 received. Development Director Mary Christenson said the school plans to work with nearby organic farmers to grow and mill gluten-free grains.
- Training programs and educational materials for schools in Chicago (\$3,500, \$2,300), Cincinnati (\$8,800, \$4,450), Minneapolis (\$4,100, \$3,350), and Ann Arbor, Mich. (\$500, \$550).

Between request and grant came the step that makes this process distinctive, and it occurred at the end of the three-day gathering. School representatives began granting each other money. And each grant was accompanied by praise and support from a peer.

From Chicago to Detroit went \$500. “Over the years at our school, we’ve all been so impressed by the challenges you’ve faced,” Colleen Everhart told Linda Brooks. “It’s truly remarkable what you’ve faced.”

From Cincinnati to Four Winds went \$400. “Please send us the date” of the fence-building, Geralyn Sparough asked Marianne Fieber. “We’ve got a lot of brush and I think we have people who’d like to learn.”

From Detroit to Four Winds and its fence went \$200. “No one knows more than Detroit about the importance of safety,” Brooks told Fieber.

From Tamarack to Minnesota Waldorf went \$300. "In my eyes, you really need that science hood and I want to make sure you get it," Jean Kacanek said to Liz Lacy-Gotz.

From Detroit to Tamarack went \$200. "Children have to have water in the classroom," Brooks told Kacanek.

From Pleasant Ridge to Detroit went \$200. "You're giving all your money away," Mary Christenson said to Brooks. "We want to see you come back even stronger next year."

Chicago and Cincinnati each contributed \$500 toward Pleasant Ridge's new business enterprise. "You have vastly underestimated what it's going to cost, and we have to see if it's going to work," Sparough told Christenson. "This is a model to us for new ways to handle money and build community," said Everhart. "The world, I think, needs these kinds of ventures.

This is a drastically shortened description of what happened. In actuality, 284 separate transactions occurred – 284 gifts of cash and kindness from one school to another.

The most supported project was Pleasant Ridge and its plan to start a free-standing business, a venture Mary Christenson had described as "a new kind of endowment" in place of a stock-market fund that had recently seen money evaporate into thin air. Christenson, one of the longest-attending members, said she was experiencing a feeling she'd never had before. "I feel like I should give it back," she said.

"That's how I feel every year," replied Linda Brooks, of Detroit.

All now had a stake in all. The work and varied experiments in keeping small schools healthy and prosperous would be, in some way, the work of all.

"Once all of these are accomplished, I feel that coming back and learning what was done will be a huge resource," said Liz Lacey-Gotz, of Minnesota Waldorf School.



Katrina Klapfack, of Rudolf Steiner School, Ann Arbor, kept track as money changed hands again and again.

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