



Interview with Paul Schervish, Executive Director for the Center on Wealth & Philanthropy at Boston College

Q. Tell us a brief history of CWP and when did you join the Center?

A. I joined the Center in 1979 when I came to Boston College. At that time it was a Center focusing on the economic analysis of poverty and welfare issues. In 1984 I became the Director and had the opportunity to meet a donor who had come to Boston College. The Dean had invited me to meet with the donor who had a question about whether people who are financially secure or however you want to put it, have an interest in doing more for philanthropy. I told him that the answer is sometimes yes and sometimes no. If you want to study what it sounds like, looks like and what the variables are that contribute to the answer being yes or no we can proceed with research. The donor agreed to fund the study so from 1985 on we have focused on this question of wealth and philanthropy.

Q. You recently went through the name change, how does the name change reflect your current mission and focus?

A. We were previously called the Social Welfare Research Institute and we thought that was good enough to capture the realm of philanthropy but people thought we were a social work organization. We changed the name about four or five years ago to the Center on Wealth and Philanthropy. I think it has made a lot of difference. The name change caught up with the focus rather than the focus changing because the name changed. From the very beginning we have asked the question that we framed as a sociological, economic, psychological, spiritual and a religious question. And we looked at the dimensions of philanthropy and wealth from all those angles. From the very beginning we have wanted to know what the relationship is between extraordinary wealth and philanthropy.

Q. How do you define extraordinary wealth?

A. When we first started I would say 5 to 10 million dollars but today it is closer to 20 to 25 million. A lot of what we say has to do with the growing standard of living and affluence in our nation and applies to a growing number of people who are not necessarily extraordinarily wealthy or even wealthy, but are affluent.

Q. At the Center, you talk about the motivation for charitable involvement and the underlying meaning and practice of care. How broadly do you define care?

A. The rationale at its deepest level for what we are doing is not really about philanthropy in its modern usage of the term. It is about philanthropy in its fundamental sense or belief. Aristotle talks a lot about this as do others. *Philia*, which is the root word for philanthropy and *anthropia* which is Greek had nothing to do with the special tax deductible IRS defining sector. *Philia* is a form of love that focuses on friendship and friends as those that are engaged in mutual nourishment. Aristotle says that friends are two bodies in one soul. A friend is another self. So going back to the root of the word *Philia* you start to understand that this as the beginning of a parent child relationship and extends in concentric circles.

In each case there are concentric circles where you are broadening the realm of those whom you feel nourished by and wish to nourish. I think that the traditional notion of philanthropy as applied to a sector and to definitions of tax deductibility is nested in a bigger realm which I call financial care or financial *Philia* and that is vested in something deeper which is care in general. Jules Toner, a Jesuit philosopher defined *care* like Aristotle defined *Philia*, as a form of love. For both Aristotle and Toner; Toner Care and Aristotle *Philia*; *Philia* and Care are the way the love is carried out in one particular way. It is a relational love where there is practical activity going on. So you could say as Toner says that care or friendship love is the way that love is implemented. I use the terms *Philia* and Care to describe what the big horizon is.

Now, the major obligation in our lives is to care; care in a way that a servant would, care in the way Jesus as a servant cared when meeting the true needs of others. You can always debate what *Philia* should be or what Care should be in meeting the true needs or the true nourishment of another, but it is always the right question. So philanthropy as we know it today is a form of financially meeting the true needs of others. It is only one way of financial care; other ways of financial care are paying your kids tuition, saving money, buying a house, building a business, paying taxes, taking care of your brothers or sisters, etc. You see ... it is bigger than this realm. Then there is another realm that we talk about that is this formal realm of philanthropy today. We understand what we are doing is dealing not just with wealth, but resources. We are not just dealing with the modern notion of philanthropy but care. So our deeper issue that our Center is studying is resources and how they become applied to care, values, aspirations, desires, expectations, or the will of God. Resources are latent until they are put into motion by a desire or a value. That is what we call a moral biography. Philanthropy is a specific form of that; money philanthropy charitable giving. It is the application of financial resources to a purpose that one has determined is the purpose that they are to attend to given their talents, their time, and their interests.

Q. The history of the American Catholic laity is a history of charitable giving and philanthropy in building institutions such as Catholic colleges, universities, hospitals, as well as parishes and shrines to name a few. With the tremendous wealth accumulation that we are living in right now, what will the next generation of Catholic philanthropy look like?

A. Catholicism is a world religion. Catholics tend not to think of Catholic Institutions as being particularly privileged for their giving unlike other religious traditions; the Latter Day Saints, Jews or Evangelical Protestants. Their traditions think of their church as the place where God first wants their money to be given. Catholics tend to think that where their money is to be given is to be determined by their own philanthropy vocation. What I mean by their vocation is that they are not following orders in their philanthropy but rather they are discovering their destiny, that is; discovering their vocation. A vocation is a way in which you care for the true needs of others in a way that brings you effectiveness and significance. So you do something important that you are able to do and it brings you greater happiness, as well as helping you achieve your ultimate end. Today, Catholics do not single out Catholic Institutions as particularly privileged other than perhaps their parish if they are attached to it. Catholics today give more broadly. The Catholic Church, while making attempts at various times to give a greater priority to Catholic causes or to your parish community, has not been very successful in that. Catholics give the lowest percentage of their income to their Church of any religious group.

Q. Are Catholics giving outside of the Church?

A. Yes. Not more than others but equal to them. Catholics are as likely to give to secular causes as religious causes while many other religious groups tend to give more to their religious causes rather than secular causes.

Q. In your research, how is today's tremendous wealth accumulation affecting giving to religious communities in particular?

A. Giving directly to religious communities today is increasingly responding to a fund raising appeal. I know the Jesuits and New England Province have decided to advance their own fund raising efforts by starting a number of spiritual relationship campaigns with people that wish to inform their life and their daily living by engaging in spirituality. Recently the New England province had a gala, they do this every year, but this year they broke the 1 million-dollar mark. So it is when you become active and call upon the loyalty, the identification and the desire of people who want affiliation with you because you bring something into their life that's deeper.

Q. What can the religious do to follow up this interview and tap into your resources?

A. They can go to our Web page and they can search by year, by title or by topic and a couple of the topics that may be of interest are Wealth and Religion, and Wealth and Spirituality. But I would also suggest this; talk with wealth holders and learn the spirituality of wealth holders. Learn the language. Do what the great missionaries did in the area of missionary work today. Do what I call a biographical interview where you are helping the people you are engaging to do a review of their life by asking them what were the changing points in their life and who was involved in it? What happened to them in all the stages of their life and what did they do about it? What were the breaks they had and who were the people that made the difference and what are they identified with? Who were the people who cared for them, their families, their mother or father and what are they grateful for and what do they want to change in the world or prove? Ask them to tell you about their wealth and how they got it? What do they think they should do with it? What is the best thing they have ever done with it and what is the worst thing they have ever done with their wealth? What is the best thing their wealth has done for their kids and what is the worst thing it is done for their kids and what are they most afraid it might do? What is the best thing their wealth has done for their workers or their associates in business? What is the worst thing or what is the best thing they have done for the world and want to do for the world and what is the worst thing they have done in terms of their money?

You will learn how to become informed just like the missionaries learned to become informed about China, Japan, Peru, Brazil, Congo, Sudan and India. Learning about wealth is foreign territory to most religious, but it can be a fresh understanding for learning how to communicate and connect with wealth holders and how they think about Philia and Care.

Paul G. Schervish is Professor of Sociology and Director of the Center on Wealth and Philanthropy (CWP) at Boston College. Schervish was appointed a Fulbright Scholar for the 2000-2001 academic year at University College Cork in the area of research on philanthropy. For the 1999-2000 academic year he was appointed Distinguished Visiting Professor at the Indiana University Center on Philanthropy.

He received a bachelor's degree in literature from the University of Detroit, a Masters in sociology from Northwestern University, a Masters of Divinity Degree from the Jesuit School of Theology at Berkeley, and a Ph.D. in Sociology from the University of Wisconsin, Madison.

Schervish directed the "Study on Wealth and Philanthropy," an examination of the strategies of living and giving among 130 millionaires, and the study, "The Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart." Along with John J. Havens, Associate Director of CWP, he is currently directing "Dilemmas and Decisions Surrounding the Accumulation and Distribution of Financial Resources" funded by the T. B. Murphy Foundation Charitable Trust, and "The Emerging Material and Spiritual Determinants of Charitable Giving by Wealth Holders," funded by the Lilly Endowment, Inc.

Schervish and Havens, in conjunction with Bankers Trust Private Banking completed the Deutsche Bank Private Banking "Wealth with Responsibility Study/2000," a study of 112 wealth holders with net worth in excess of \$5 million regarding their charitable giving and volunteering, attitudes about social issues, socially responsible investing, trust and estate planning, and the transfer of values to heirs. Along with John Havens he released the report, "Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy," which estimates the wealth transfer over the next half century to be between \$41 trillion and \$136 trillion. With Mary A. O'Herlihy, CWP Research Associate and Director of Publications, and John Havens, Schervish recently completed "The 2001 High-Tech Donors Study," which interviewed high-tech wealth holders about their philanthropic attitudes and practices.

He was recently named to the NonProfit Times' sixth annual "Power and Influence Top 50," a list which acknowledges movers and shakers in the non-profit world. He joins such notable figures as Microsoft Chairman Bill Gates, AOL Time Warner Foundation Executive Director David Eisner, and Millard Fuller, Founder and President of Habitat for Humanity International. This marks Schervish's third consecutive appearance on the list. The Nonprofit Times notes that: "Numbers are just figures until Paul Schervish puts them in context. His passion for donor behavioral research, with John Havens, has brought true insight into how people give."

Schervish has published in the areas of philanthropy, the sociology of money, the sociology of wealth, labor markets, unemployment, biographical narrative, and the sociology of religion. He is completing work on "The Modern Medici: Strategies of Philanthropy among the Wealthy" (Jossey-Bass). Schervish is the editor of and contributor to "Wealth in Western Thought: The Case for and against Riches" (Praeger, 1994). He is principal editor of "Care and Community in Modern Society" (Jossey-Bass, 1995) and the principal author of "Taking Giving Seriously" (Indiana University Center on Philanthropy, 1993) and of "Gospels of Wealth: How the Rich Portray their Lives" (Praeger, 1994). Schervish also serves regularly as a speaker and consultant on how to surface and analyze the moral biographies of wealth holders, on the motivations for charitable giving, on the demographic patterns of wealth and charitable giving, and on the spirituality of financial life.

