

# Cultivating Mutual Accountability— An Interview with Kelvin Taketa and Chris Van Bergeijk

by the editors

**N**onprofit Quarterly: *What is the future of the relationship between nonprofits and philanthropy?*

*Kelvin Taketa:* Our ability to effect change in the community in Hawaii is entirely dependent on the skills, the dedication, the competencies of the organizations we fund and even of the organizations we don't fund. We are not the change makers; they are. So in our work, we have always tried through external feedback mechanisms and evaluation, along with our own networks, to really listen to our grantees in order to understand whether we are doing a good job of achieving what we set out to do. But I think the big shift for us has been a much deeper engagement with potential grantees in a given field at an earlier stage even before creating the details of a program; it feels more like a partnership than the typical power dynamic between a funder and a grantee.

*Chris Van Bergeijk:* We are becoming more and more convinced of the value of network

approaches. And we have learned that a little bit by accident through our leadership development program, PONO, a program we started seven years ago with David LaPiana.

We bring together 12 to 15 executive directors for 11 months, and what we learned was the value of relationships they built with one another and the candor that grew over time between individuals in the group as well as with foundation staff. In the beginning, we had a big debate with David LaPiana whether we should sit in the room as grantmakers and whether just our presence in the room was going to change the dynamic. He became convinced that people don't pull their punches when you are sitting in the room with the right attitude about why you are there.

**NPQ:** *What is the right attitude?*

*CVB:* I think the attitude has to be one of sincerely wanting to learn. As Kelvin said, we don't do this work; we are not the experts. We could hire the most skilled, respected individual out of any sector in the community to become a program officer at the foundation, and within in a year that knowledge starts to become dated.

So when we sit in the room, if we are really clear with people that we really want to understand the

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challenges they face and their strategies, they pretty quickly drop their guard. We are really trying to understand the synergy that occurs between organizations and between people who wouldn't necessarily meet if we didn't bring them together. We are using a network approach more and more; it requires us to involve people. And that's where our program strategies have really improved as a result of a much broader discussion.

**KT:** I have a friend who always asks whether you are in the "send" or the "receive" mode. I recall many times when we would develop our theory of change, draft our request for proposal [RFP], and make grants. Then we would bring all the grantees together and talk about what we were trying to do, and we would explain our theory of change. But it was all in the send mode. They received their checks and took a picture, and off they went.

Where Chris and our program staff have really shifted the thinking is that the actions are more about receiving than about sending. A good example is our Schools of the Future initiative, where getting educators involved even before we shaped the program completely changed what we ended up doing.

**CVB:** This is a new program that we started nearly a year ago. We were responding to more and more requests from schools regarding their technology needs. We originally thought we should do a subset of grants that focused on technology, and we asked a local intermediary to help us understand the issue.

The intermediary suggested we invite about 15 people from schools across the state and just talk "story" with us. We did that, and I walked out of that room just completely blown away. They were talking about a whole movement of transforming schools as we know them to meet the twenty-first century needs for kids. It started out as this simple, plain-vanilla technology idea and evolved.

After that meeting, we held several others. And we took a whole year to actually develop an RFP

that is really all about education transformation now, and technology is really just a subset of that. We would never have gotten there had we had just done it by ourselves. We would have ended up with an RFP that would have been helpful but would have never taken aim at substantial reform.

**KT:** An article I read this morning talked about a new service for measuring nonprofit performance. As with publicly traded companies, it is trying to provide donors, as investors, with a sort of new investor screen. But I would say that approach doesn't acknowledge *mutual* accountability.

It's different when you're talking about investing where you're trying to create social change. I don't think you can look at the dynamic [through the investor model]. We need our grantees and the larger nonprofit community to help us be as good as we can be and that we need to help them be as good as they can be. It's not like we're an investor who looks impartially at a set of metrics and invests only in organizations that would potentially generate the highest return. Because that's not our job.

The cumulative impact of our investments is a better community, and it's not always about the highest and best investments. We need to keep in mind the big picture of what is needed in the community. An investor approach ignores the interconnectedness of so much of the community-change work and changes the dynamic of the level of mutual accountability and, to some degree, an intimacy that I think is important to the work. That said, this kind of grantmaking is hard work.

When I talk about these kinds of things to a broader audience, it scares people. There are a lot of skeptical people who have a hard time swallowing whether we can sit at the table without a huge tilt. I think they think we might be a little naive about it.

**NPQ:** Also, they might believe that Hawaii is culturally odd.

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**KT:** Yeah, I think we are. But if the 44th president can bring island ways—the big tent—from Hawaii, maybe it's our time to do the same. I know the fashion is to talk about strategic grantmaking as if it can all be done from our end. But for us, paying attention to the process, roles, and relationships has become more important than the intellectual precision of the outcomes.

**NPQ:** *Meg Wheatley [the former president of the Berkana Institute] has discussed how difficult it is when you have a vastly changed environment to go in with clear outcomes. You really don't know what you're looking at anymore. All you can do is try to engage people and to encourage links between people—which sounds almost exactly like what you're trying to do.*

**CVB:** That's exactly it.

**KT:** Probably the apocryphal tale for us was after September 11, when the planes quit flying to Hawaii. Tourism is, of course, a big part of Hawaii's economy. Basically, at the urging of our board, we launched an outreach effort—it was like 40 meetings in 30 days. We went in with ideas about what we could do, so it had a similar feeling to what's going on now. I remember we went in thinking we were going to do one thing, and as a consequence of all those conversations our staff had all through the state, we completely changed what we ended up doing. That was the start of realizing the power of this kind of work.

**NPQ:** *What's your greatest hope for this new approach?*

**CVB:** That we can categorize and harness the power of the connections that occur between groups. There's a real price that comes from the isolation between organizations. There's no chance to share practices or that audacious idea that you have but keep on the back burner because you

know you could never do it by yourself. By working together with people on a regular basis, bringing them together, we find the grout that glues the tiles together is where the power is. It allows us to come up with bigger approaches and bigger solutions to social issues.

**KT:** Two words that people often use to identify what hinders nonprofit organizations from delivering the goods are *isolation* and *fragmentation*. The hope for us is that out of this approach comes collective action that's bigger than the sum of the parts—all those things we feel have the potential to be created or resolved if you deal with the fragmentation and isolation.

You can't do it any other way. We have a wonderful opportunity to really understand and learn from the people who are on the ground. And in order to do that, we have to give up control, which is a really scary thing. But it's been a phenomenal learning experience. We've become a much better community investor as a consequence.

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