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Leading With Shared Values: Developing a Charter of Principles for Philanthropic Partnerships

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Introduction

Values-based philanthropy, always an important aspect of grantmaking, is emerging as increasingly critical to how philanthropy moves forward. Toward this end, it can be beneficial for foundations and grantees to articulate a set of shared principles that will guide their efforts. This approach can take the form of a charter or agreement that can serve as a North Star to guide both partners in addressing opportunities and challenges and to ensure that those principles of the partnership remain true over time.

Deeply rooted in and guided by a funder's core values, values-based philanthropy brings those values to an intersection with social needs and opportunities for promoting public good with giving, resulting in an empowered and informed approach. It involves investing in public goods and causes that reflect a funder's beliefs, principles, and ethical considerations (Frumkin, 2008), thus going beyond simply responding to immediate needs or funding requests to create lasting positive change.

Over the past 25 years, philanthropy has grown exponentially in both scale and pace of giving (Indiana University Lilly Family School of Philanthropy, 2021). There are more philanthropists with greater levels of wealth and of giving than at any other time in recent history, and an increasing number have committed to giving away the bulk of their wealth in their lifetimes (Moody, 2022; Ferris, 2021, 2016). As a result, philanthropy has become more pluralistic, reflecting a greater number and diversity of

Key Points

- The rise of greater individuality in giving — in diversity of beliefs and donor preferences — has resulted in a need to ensure alignment of values and expectations between those entering into funding relationships, and therefore a need to return to giving that recognizes the importance of conditions and considerations that undergird the partnership between the philanthropic organization and awardee.
- The Kern Family Foundation's nearly \$88 million investment in the Medical College of Wisconsin represents one example where creating a charter was pivotal to a partnership's effectiveness. Their charter describes a commitment to shared values, including character, caring, and practical wisdom, as well as freedom of expression, principled innovation, merit, and inclusive excellence.
- This article describes how creating a charter of principles shared by funder and grantee can establish a common language and understanding of the key priorities and principles guiding the funded work. A charter also helps a partnership navigate new opportunities and challenges with the knowledge that its actions align with its shared values, serving as a framework for continued dialogue and reflection.
- This article shares insights into the process of developing this charter, its key elements and benefits, and lessons learned. It seeks to offer guidance to other philanthropic organizations and awardees on optimal strategies for positioning their partnerships for ongoing alignment and accountability to the principles that undergird their work.

perspectives about giving priorities; and more individualistic, reflecting a greater sense of personal identity, autonomy, and freedom in making giving priorities. These trends have given rise to more funders directing their giving to align with their own diverse values and beliefs (Ferris, 2016).

As noted by Tracy Nowski, partner for global philanthropy at McKinsey and Company, and her colleagues,

What's striking is not only the scale of capital being committed by major philanthropists (at least \$10.3 billion globally as of May 2020, according to Candid ...) but also how it is being given: at record speed, with fewer conditions, and in greater collaboration with others. According to the Council on Foundations, almost 750 foundations have signed a public pledge to streamline grant-making processes, and individual donors are partnering with their peers to make sizable grants with less paperwork. (Nowski et al., 2020, para. 2)

The rise of greater individuality in giving — in diversity of beliefs and donor preferences — has resulted in a need to ensure alignment of values and expectations between those entering into funding relationships, and therefore a need to return to giving that recognizes the importance of conditions and considerations that undergird the partnership between the philanthropic organization and awardee. This alignment extends to ensuring that funders are investing in initiatives and partnerships that reflect their values and intentions. Alignment of values is also essential for ensuring productive and synergistic funding collaboratives and networks with other funders and partners.

The partnership between the Robert D. and Patricia E. Kern Family Foundation (KFF) and the Medical College of Wisconsin (MCW) is an example of how a funder can work with a grantee to align shared values and expectations. Articulating shared values as a best practice for philanthropists and their partners can be a transformative effort. Through the process of formulating a charter, key stakeholders in philanthropic investments ensure clarity of essential priorities and think through how their distinct

institutional values can come together into fortified, collective principles for a greater purpose. Furthermore, the charter can serve as a vital reference point as conditions shift over time, thus upholding the integrity of the partnership's guiding principles and objectives.

The History of a Partnership

In 2012, a group of educators from seven U.S. medical schools met to consider challenges facing contemporary medical education. With support from the Kern Family Foundation, the group initially focused its efforts on the need for the teaching of health care delivery to better align physician training with 21st-century needs. However, a general erosion of trust in the health care system and ongoing disillusionment among physicians, trainees, and patients challenged the group to expand its focus and prioritize character, caring, and practical wisdom to transform medical education.

The Medical College of Wisconsin's deep commitment to transforming medical education and the profession of medicine with this emphasis was enhanced by a transformative investment of \$37.9 million from the Kern family and foundation in February 2017. The gift established the Robert D. and Patricia E. Kern Institute for the Transformation of Medical Education at MCW and the Kern National Network for Flourishing in Medicine. Direct engagement with the Kern family and foundation leaders, staff, and board members was key to the depth and strength of the partnership.

The Kern family is pivotal in guiding the mission and work of the foundation. The KFF's board of directors, comprising a Kern family member, the foundation president, and leaders from the Wisconsin business and philanthropic communities, reviews and approves grant opportunities in quarterly meetings that have been cultivated by the foundation's leadership and staff. The KFF takes a relational, long-term approach to grantmaking and employs a network-based theory of change, working closely with key partners and empowering them to make decisions, build networks, and advance shared goals and aspirations.

The KFF will be sunseting no later than the year 2035, but the foundation envisions that work of MCW — and that of many of the foundation's other partners — will continue well beyond that date.

With the success of its first five-year investment in the college, the foundation made the decision in 2022 to invest \$50 million over an additional five years in a second phase of support for the expansion of the Kern Institute and Kern National Network. As the foundation and the college sought to recommit to its partnership for an additional five years, they found themselves in a time of unprecedented national polarization and uncertainty about a range of societal issues that intersected with health care. In the face of that polarization, the foundation's president requested the development of a partnership charter that would articulate the shared values that would guide the partnership through its continued work in transforming medical education and the profession of medicine.

The circumstances that led to the creation of the charter were informed by the challenging social and political landscape in U.S. higher education, and medical education in particular, that may make it difficult to advance the partnership's commitments to advance character, caring, practical wisdom, and flourishing in the profession of medicine. The charter has been useful to the development of a deeper perspective on our shared alignment that can be referenced along the journey of our partnership during the foundation's life.

The result thus far has been a continued deepening of trust and shared understanding that builds on the existing collaboration between our organizations. This is the first such charter that has been developed with a foundation partner, and

it is possible that a similar approach may emerge in the context of other partnerships, either in higher education or with other institutions. The KFF will be sunseting no later than the year 2035, but the foundation envisions that work of MCW — and that of many of the foundation's other partners — will continue well beyond that date. Bringing the concepts of the charter to life while the KFF is still in operation may also help to maintain alignment for this work after the foundation has closed.

The Charter

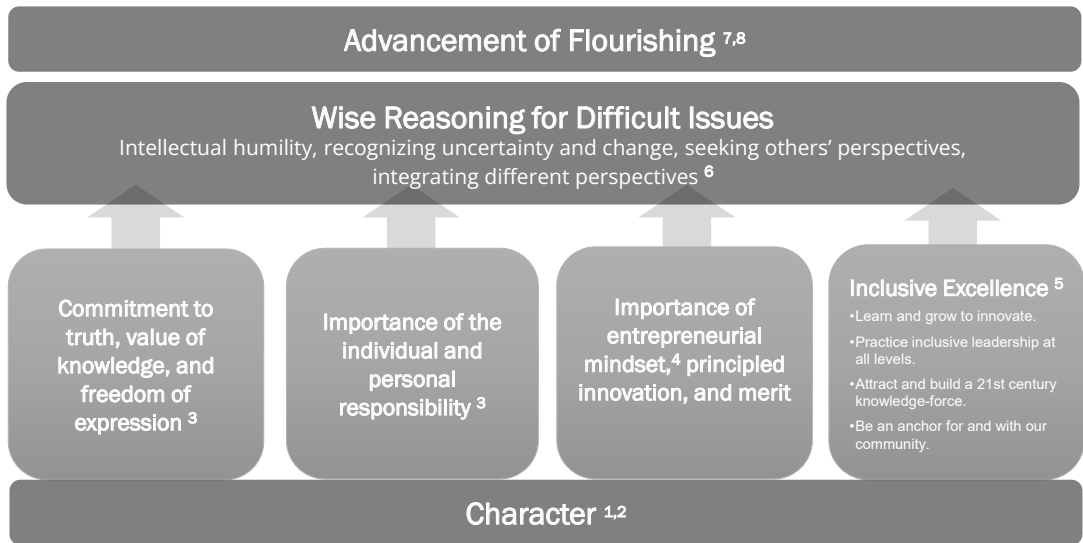
The Kern Family Foundation–Medical College of Wisconsin charter articulated the organizations' mutual commitment to shared values, including the foundation's mission of empowering the rising generation of Americans to build flourishing lives anchored in strong character, inspired by quality education, driven by an entrepreneurial mindset, and guided by the desire to create value for others, as well as focusing on initiatives that have sustainable, systemic impact. MCW's values ensure that its institutional culture not only reflects its commitment to the highest performance and accomplishments, but also creates a supportive environment for faculty, staff, and students to flourish. These shared values are reflected in the partnership charter.

Further, the KFF–MCW charter recognizes values to be more subjective to individuals and organizations; they operate to influence behavior at the individual level. Principles are more universal and objective, and serve as an overarching umbrella or universe within which we operate. Values inform our decisions and behaviors within that environment (Garner, 2004).

The charter's framework is composed of four main elements: the foundational importance of character; four sets of shared principles; a commitment to wise reasoning; and the goal of enhancing flourishing. (See Figure 1.)

- **Character:** Character, a foundational element, undergirds how the KFF and the institution work together. MCW is committed

FIGURE 1 Framework for a Charter of Principles Guiding Philanthropic Partnership



¹ Kern National Network for Flourishing in Medicine. (n.d.). *Character in medicine*. <https://knnaringcharactermedicine.org/>

² Jubilee Centre for Character and Virtues. (2022). *A framework for character education in schools*. University of Birmingham. <https://www.jubileecentre.ac.uk/?character-education=-the-jubilee-centre-framework-for-character-education-in-schools>

³ University of Chicago. (2014). *Report of the committee on freedom of expression*. <https://provost.uchicago.edu/sites/default/files/documents/reports/FOECommitteeReport.pdf>

⁴ Rae, D., & Melton, D. E. (2017). Developing an entrepreneurial mindset in US engineering education: An international view of the KEEN project. *Journal of Engineering Entrepreneurship*, 7(3), 1-16.

⁵ Medical College of Wisconsin. (2024). *Inclusive excellence*. <https://www.mcw.edu/departments/office-of-diversity-and-inclusion/inclusive-excellence>

⁶ Grossmann, I., & Dorfman, A. (2019). Wise reasoning in an uncertain world. In R. J. Sternberg, H. C. Nusbaum, & J. Glück (Eds.), *Applying wisdom to contemporary world problems* (pp. 51-79). Palgrave MacMillan.

⁷ VanderWeele, T. J. (2017). On the promotion of human flourishing. *Proceedings of the National Academy of Sciences*, 114(31), 8148-8156.

⁸ Su, F. (2020). *Mathematics for human flourishing*. Yale University Press.

to fostering character in the profession of medicine to advance flourishing in health care locally and nationally. It does this work through its partnerships within medical education, across health systems, with other network partners, and via accountability to society. Building upon the work of thought leaders such as the Jubilee Centre for Character and Virtues (2013), MCW defines “character” as the complex “constellation of characteristics — moral, civic, intellectual, and performance — formed over time and manifest” in individual and group dispositions and everyday practices (Kern National Network, n.d., para. 1).

- **Four sets of shared principles:**
 - *Commitment to truth, the value of knowledge, and freedom of expression.* Commitment to freedom of expression and inquiry, as well as fostering respectful dialogue across a wide variety of opinions, are critical components of the work. This element reflects the belief that promoting the free exchange of ideas creates the possibility of future advances. Academic commitment to free inquiry reflects the view that every idea must be heard so that it may be subjected to the rigorous scrutiny necessary

To ensure an effective charter, it is important to begin with open and inclusive dialogue between the funder and the awardee about priorities and principles.

to advance knowledge and seek truth (University of Chicago, 2014).

- o *Importance of the individual and personal responsibility.* The foundation and MCW recognize that the individual is an essential actor in transformation. As such, a leading principle of the charter is advancing individual thought and action, along with personal responsibility. These are necessary to achieving accomplishments and creating positive change (University of Chicago, 2014).
- o *Importance of entrepreneurial mindset, principled innovation, and merit.* The Medical College of Wisconsin works to create opportunities for individuals and teams to chart their own course, develop innovative ideas, and assess success and viability. MCW is committed to concepts of curiosity, connection, and creating value (Rae & Melton, 2017); its leaders honor earned success in recruitment and recognition while striving to create a diverse and inclusive community of excellence.
- o *Commitment to inclusive excellence.* The college maintains that inclusive excellence begins as its people learn to innovate and “to engage constructively around differences and grow in their ability to adapt to change and embrace diversity. It advances when people are cultivated, can act, and be recognized as inclusive leaders at all levels,” an approach that allows MCW “to attract, build, and retain a 21st-century knowledge-force that reflects diverse

identities, backgrounds, viewpoints, abilities, and recognizes people’s potential” and “to invest in and partner with [the] community ... as an anchor institution and enable access to the outstanding talent and strong ... partnerships that cultivate a healthy and thriving community” (MCW, 2024, para. 3).

- **Wise reasoning to address difficult issues:** Wise reasoning — the use of judgment, reasoning, and experience to make wise and ethical decisions — is one important manifestation of character in action. As a framework, wise reasoning helps to address difficult and complex issues through a focus on intellectual humility, recognizing uncertainty and change, seeking the perspectives of others, and integrating different perspectives into our actions and decisions (Grossman & Dorfman, 2019).
- **Human flourishing:** MCW strives to advance meaning and purpose, well-being, happiness, life satisfaction, and close social relationships, and defines flourishing consistent with the work of Tyler VanderWeele (2017) of the Harvard University Human Flourishing Program. Advancing human flourishing is an aspirational goal. Character, the four shared principles, and wise reasoning are essential to bringing MCW closer to that goal.

Key Elements in the Development of a Charter

In the experience of the Kern Family Foundation and MCW, the formation of the charter was pivotal to the partnership’s effectiveness. The following insights into the process of developing the charter, its key elements and benefits, and lessons learned can offer valuable guidance to other funders and grantees.

- *Engage in open dialogue and exchange about charter principles.* To ensure an effective charter, it is important to begin with open and inclusive dialogue between the funder and the awardee about priorities and principles. This requires coming to the relationship with a willingness to listen and learn from diverse

perspectives and taking the time to ask questions and understand what matters most. For most funders and awardees, these conversations draw from the individual history and principles that each brings to the partnership. For example, MCW's commitment to inclusive excellence was one that had been in place at the institution for some years prior to its partnership with the KFF.

- *Ensure common language and understanding of key priorities and principles.* It also is critical to discuss what each principle means in mutually understandable terms. This can often require sharing resources that help each partner understand the environment and context within which the principles will be communicated and implemented.
- *Articulate the principles and document them in a charter.* Once identification of the core principles has been reached and mutual understanding of their meaning clarified, it is critical to articulate them in a written document that can be referenced and revisited over time.

It is important to commit to regularly evaluating the charter and principles and adjusting, as needed, to ensure that they remain relevant to and effective in guiding the partnership's growth and development.

- *Ensure alignment with and accountability to partnership principles and recognize the importance of revisiting the principles and building in flexibility for growth and adaptation.* It should be expected that circumstances will change as new opportunities and challenges arise. As such, it is important to commit to regularly evaluating the charter and principles and adjusting, as needed, to ensure that they remain relevant to and effective in guiding the partnership's growth and development.

An Example of the Charter in Action: Recognize that conflicts will occur and commit to openly and honestly addressing them.

An event was planned on MCW's campus around the time of commencement that created division among faculty, staff, students, and external stakeholders. As tensions continued to escalate, MCW leadership spent a great deal of time navigating both the concerns and the multifaceted issues raised. Ultimately, permission to use the MCW campus for the event was rescinded, although the president secured alternative off-campus space for the event.

MCW's decision received much local and national press coverage that focused on the issue of freedom of expression — one of the principles named in the KFF-MCW charter — and representatives from both partners came together to discuss the challenge and clarify the charter principles.

Using the process outlined in this article, these leaders engaged in open dialogue about the challenge and clarified the original intent and meaning of the principles and how they are translated into decision-making, policies, and practices. This approach allowed for both the KFF and MCW to revisit the charter principles and reaffirm their commitment to the charter's power in serving as a North Star for the partnership.

Although there were no changes to the charter itself, the process provided an opportunity to deepen mutual understanding about shared principles and questions they might raise as they are upheld in different contexts. The event also led MCW's president to create a committee on freedom of expression that would establish a set of principles and make recommendations about how they would become a part of the college's culture.

The act of explicitly stating shared principles can influence how an institution thinks about and lives the principles across all of its stakeholders.

- *Communicate the charter with key leaders responsible for implementation.* It is important that the charter is shared and communicated with stakeholders responsible for upholding and delivering on the charter's priorities and principles. This is especially relevant in an academic environment. Practically, this can mean ensuring there is a plan for distributing and discussing the charter at meetings, in email correspondence, and in reports. The Kern National Network uses the charter as a foundational document for collaboration with others.

While development of the charter of principles for philanthropic partnerships is helpful, it is only truly valuable if it is regularly revisited, tested, and affirmed. To ensure alignment and accountability to the charter's principles, there must be a strong commitment from institutional leaders to ongoing communication and evaluation of the principles and their use to inform decision-making and practices.

Building in regular reporting mechanisms to address the charter principles can also be helpful. Similarly, it is wise to respond to challenges as they arise and revisit the principles and language of the charter as needed to support its continued relevance and vitality as a guiding document for the partnership.

Lessons Learned

Especially from the foundation's perspective, the development of the charter emerged from a long-standing partnership where there was already shared trust and understanding. It might be difficult or ill-advised to create such a charter if there has not been sufficient time to gain trust

through a productive working relationship where both sides felt comfortable taking this step.

In addition, the leadership of both organizations has been consistent throughout our partnership, with stability into the future envisioned. This is important for considering the practicality and joint accountability of living into the charter as a shared foundation.

The foundation also has been able to share the charter with some of its other partners as an example of articulating shared values and commitments, which signals pathways for how the foundation may journey forward with other partners.

While generated from principles shared by the Kern Family Foundation and MCW, the charter has provided the college a unique opportunity to examine the benefits of the charter, the articulated principles, and the role they can serve in fostering institutional transformation.

Other lessons learned in the development and use of the charter include:

- *A charter of shared principles between philanthropic organizations and awardees can enhance an institution's own processes.* The act of explicitly stating shared principles can influence how an institution thinks about and lives the principles across all of its stakeholders. Grappling with such questions as how the institution's stakeholders internalize and uphold values and what it means when principles come into conflict can help to ensure an institution's principles are a living part of its culture. The KFF-MCW charter resulted in stimulating conversations across the organizations about values-based decision-making and the meaning of freedom of expression as a first principle. In this way, the charter has been a helpful tool in fostering meaningful culture change and organizational identity at MCW.
- *The process is part of the value of the charter.* Implementing a charter demands significant time and genuine effort on the part of both

the funder and the partnering organization. This shared commitment can reflect and sustain a distinctive bond formed through the commitment to shared principles and working through challenges that might arise.

- *The charter is a shared responsibility.* Ensuring accountability to the charter's principles will require senior leaders to cascade responsibilities to a broader and more diverse set of institutional leaders. This creates an opportunity to foster champions at all organizational levels, and not just with senior leaders or the office of development and fundraising. Further, it is important for leaders to have clear exemplars throughout the organization to model the value-based mindset and actions.
- *Conflict is inevitable and must be addressed as it arises.* All partnerships and collaborations will encounter challenges over time. Collaborative efforts inevitably come with tension, and acknowledging and addressing this tension is vital for successful partnerships. It is important to recognize and address tensions as they arise. The charter can serve as a true north for managing manage disagreements and to foster an environment in which collaboration can thrive despite challenges.

These lessons learned underscore the potential of a charter to serve as a catalyst for positive change and enhanced collaboration within partnerships and offer insights helpful to other organizations interested in using a charter to guide their partnerships. Not every investment may require such a charter; the partners will need to decide when it is appropriate. For example, is such a charter more relevant for what would be considered transformative gifts? Foremost, it is important for both sides to be direct and honest, but also empathetic as to the circumstances and decisions that inform difficult situations which may arise that challenge the efficacy of the charter. Hard conversations over time will be necessary in situations such as these, and both parties cannot shy away from the interaction. A charter holds strong when both parties are committed to living into it and honoring their shared partnership for the long term.

Benefits of Creating a Charter of Shared Principles

Once developed, a charter can add significant value to philanthropic partnerships with awardees by ensuring common language and mutual understanding of key priorities and principles. It also can provide an important checkpoint for awardees to ensure integrity of their mission and funder relationships as they consider and engage in new funding partnerships. Finally, the charter can serve as a guiding document that ensures dialogue and reflection on the meaning of the partnership and its value.

As a spend-down foundation that will close its doors no later than the year 2035, the KFF desires to create the conditions for aligned momentum in a tumultuous time, allowing for impact to occur within the limited horizon of the foundation's lifespan while also setting the tone and ethos for moving forward with the work after the KFF has ceased to exist.

As the Kern Family Foundation and the Medical College of Wisconsin have been living this journey together, in moving forward we are working to go beyond values — which can be more individual, subjective, and change over time — to a deeper commitment based on principles, which are more powerful and enduring. There is much work to be done toward that end, and other philanthropists and their partners can engage in that work as well.

Conclusion

The social and political landscape is constantly evolving, driven by a sometimes-turbulent stream of issues and challenges. Values-based philanthropy can help philanthropic organizations stay informed and engaged with these issues and direct their giving toward organizations and causes that are working to address them.

Developing a shared charter of principles to guide philanthropic partnerships can prove a critical practice for ensuring the partnership is best positioned for a lasting and meaningful impact. By collaboratively defining these

principles, donors and awardees can align their values and vision for the funded work.

A shared set of principles documented in a charter also facilitates effective communication, helps with decision-making, and promotes a consistent approach for weighing the best way forward with new opportunities and challenges. Moreover, the process creates trust and a commitment to accountability, ultimately driving the partnership toward long-term success and growth.

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