

player in the industry reported revenues of over one billion Euros in 2022 significantly contributing to local and national economies (Sanpellegrino 2023). Moreover the bottling industry provides stable employment opportunities which can significantly benefit regions with limited job prospects. Sanpellegrino alone employs thousands of workers in its facilities and Bartolini et al. (2007) underscored the far-reaching effects of such employment opportunities. The study highlighted the positive implications of stable job opportunities provided by companies like Sanpellegrino supporting individuals and families with reliable incomes and stimulating local economic activity through increased consumer spending investment and tax revenues (Bartolini et al. 2007).

However external costs such as environmental degradation and social costs are not typically accounted for in the industry's economic benefits. Local governments may incur additional expenses in managing water resources addressing health impacts and mitigating environmental damage caused by over-extraction (Cuoco et al. 2015). Such realities highlight the need to comprehensively assess the water bottling industry's economic impacts considering its benefits and external costs.

Regulatory Frameworks and Policy Analysis

The regulatory landscape in Italy and the European Union is oriented towards the sustainable management of water resources. However there is a need for greater consistency in enforcement and effectiveness. Current legislation and policies often prioritize corporate interests over public and environmental health. For instance while regulations such as the Water Framework Directive (Directive 2000/60/EC) aim to safeguard water resources and foster sustainable water management practices there are discernible inconsistencies in enforcement and regulatory gaps that have the potential to compromise these objectives thus enabling companies like Sanpellegrino to continue extracting water at unsustainable rates (Aukidy et al. 2012).

To address these challenges it is essential to introduce more stringent regulatory measures. This could involve the implementation of tighter water extraction limits and the enforcement of compliance through regular monitoring consequently contributing to the protection of water resources. Furthermore the involvement of local communities in decision-making processes concerning water resource management is crucial as it ensures that their needs and rights are duly considered (Bartolini et al. 2007). If meticulously employed these approaches may prove instrumental in amplifying the efficacy of existing regulations and driving meaningful change in the sustainable management of water resources within Italy and the European Union.

Recommendations for Sustainable Practices

A comprehensive strategy is essential to address the significant environmental impacts associated with the water bottling industry. Firstly as previously discussed stricter regulatory measures are necessary to mitigate these impacts. This entails imposing more rigorous limits on water extraction and ensuring compliance through continuous monitoring (Spiliotopoulou & Roseland 2020). These regulations should be based on scientific evaluations of sustainable extraction rates.

Secondly community engagement in decision-making processes related to water resource management is crucial. As proposed by Spiliotopoulou and Roseland (2020) and grounded in the principles of Ostrom (1998) community-based water management models have been shown to balance corporate interests and public needs effectively. A more equitable distribution of resources can be achieved by actively involving residents businesses and other stakeholders in water management decisions.

Thirdly companies should invest significantly in conservation technologies including developing methods for recycling and reusing water within bottling plants. This approach can reduce water usage and enhance the efficiency of water extraction processes (Spiliotopoulou &

Roseland 2020). The incorporation of these advanced technologies not only demonstrates a commitment to sustainable practices but also aligns with the growing societal and environmental expectations for corporate responsibility and stewardship. Therefore companies that invest in these conservation technologies are better positioned to minimize their environmental footprint and positively impact their operational costs and long-term sustainability. Furthermore corporate environmental responsibility initiatives must be prioritized within the business world. Companies like Sanpellegrino must lead in promoting environmental sustainability and social equity. For example they could consider allocating resources to funding local water conservation projects and supporting infrastructure improvements (Bae & Kim 2022). This kind of proactive approach not only benefits the environment but also positively impacts the communities in which these companies operate. Employing a multi-faceted approach to address environmental impacts by implementing rigorous regulations engaging with communities fostering technological innovation and promoting corporate responsibility initiatives is paramount (Spiliotopoulou & Roseland 2020; McNabb 2019; Bae & Kim 2022). This approach can substantially contribute to the sustainable management of water resources advocating for environmental sustainability and social equity. Additionally analyzing the water bottling industry's environmental social and economic impacts highlights the broader implications of treating water as a commercial commodity. By reorienting the management of water resources to prioritize sustainability and equity we can ensure the long-term health of both the environment and local communities. Achieving this objective requires a collaborative effort among corporations governments and communities to develop and implement strategies that harmonize economic benefits with environmental and social responsibilities.

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Again. | Caroline Winterer | TEDxStanford\n#
<https://www.youtube.com/watch/RGSSLAggAyE>\n\n00:00:04.590 [Music]\n00:00:05.210 [Applause]\n00:00:06.160 [Music]\n00:00:14.529 hello today we're going to talk about\n00:00:16.940 happiness and how we can pursue it\n00:00:19.960 differently than we usually do as\n00:00:23.439 Americans we are fascinated by happiness\n00:00:27.279 look at all of the books that I\n00:00:29.839 retrieved by simply googling books about\n00:00:33.200 happiness these are just some of the\n00:00:35.630 titles that I found they speak for\n00:00:38.000 themselves resisting happiness the\n00:00:40.910 happiness project happiness challenge\n00:00:43.690 happiness hypothesis we are all\n00:00:46.580 fascinated by the idea that we can\n00:00:49.610 pursue our own happiness and in fact the\n00:00:53.540 words happiness are written into the\n00:00:56.300 founding documents of this country\n00:00:58.640 here are the founders they're signing\n00:01:00.860 the Declaration of Independence and I'm\n00:01:02.870 bet that every single one of you in this\n00:01:05.119 room knows the words that I'm about to\n00:01:07.460 say to you that we have the right to\n00:01:10.820 life to liberty and the pursuit of\n00:01:13.850 happiness these are some of the best\n00:01:16.700 known and best loved words in American\n00:01:20.179 history but what I'm going to tell you\n00:01:22.909 today is actually that they are some of\n00:01:25.609 the most misunderstood words in American\n00:01:28.399 history now when people think about\n00:01:31.249 historians and what we do they often\n00:01:33.590 asked me you know what do you want to be\n00:01:35.119 a historian you're just looking at the\n00:01:37.670 stuff that people did a long time ago\n00:01:39.889 and we're kind of living in the now when\n00:01:42.079 we're going off into the future so what\n00:01:44.689 on earth does the past have to do with\n00:01:47.209 what we are up to today and what I tell\n00:01:50.149 them is that historians are like\n00:01:52.420 anthropologists we are listening to the\n00:01:55.609 people who are no longer here with us\n00:01:58.549 who want to tell us things things that\n00:02:02.119 can be useful to us today many of those\n00:02:05.029 people left no record of their lives\n00:02:08.209 many of them left just a tissue of words\n00:02:12.349 words that it is really difficult for us\n00:02:15.260 to recover today\n00:02:17.120 you go back in time 10 years it's\n00:02:20.120 already starting to get a little fuzzy\n00:02:21.940 20 years there were no iPhones 40 years\n00:02:26.209 we didn't have desktop computers try\n00:02:29.390 going back 300 years where I spend my\n00:02:31.909 days in the 18th century and you can\n00:02:34.760 imagine that the level of\n00:02:36.799 misunderstanding for what people said\n00:02:39.260 begins to ratchet up so what did people\n00:02:42.620 mean in the 18th century by happiness\n00:02:45.590 they meant public happiness so we have\n00:02:49.160 totally lost this concept today what on\n00:02:51.920 earth did they mean by public happiness\n00:02:54.379 what they meant by public happiness was\n00:02:57.829 every citizen thinking of the larger\n00:03:01.250 good thinking of society and thinking\n00:03:04.849 about the structures of government that\n00:03:08.000 would create a society that was peaceful\n00:03:11.329 and that would allow as many people as\n00:03:14.269 possible to flourish what they thought\n00:03:17.870 was that only public happiness would\n00:03:21.709 create the umbrella of stability and\n00:03:24.799 security under which we could pursue\n00:03:28.280 private happiness so they also had a\n00:03:31.190 concept of private happiness like those\n00:03:33.200 wonderful books that I showed you at the\n00:03:35.329 beginning of my talk today but they saw\n00:03:38.780 that private happiness was only to be\n00:03:41.900 achieved after we had achieved

public\n00:03:44.989 happiness\n00:03:45.709 so public happiness was this great and\n00:03:48.949 beautiful umbrella that could be created\n00:03:51.319 when all of us work together as citizens\n00:03:53.959 to create a society and a good\n00:03:57.049 government it's often most useful to\n00:03:59.900 think of concepts by their opposites so\n00:04:03.410 the opposite of private happiness is\n00:04:05.690 sadness the opposite of public happiness\n00:04:09.470 is something much worse it's tyranny or\n00:04:13.120 anarchy why did they have this concept\n00:04:17.238 well let me take you back to 1776 we\n00:04:21.798 have been magically transported on the\n00:04:24.260 left is my attempt to create a circle\n00:04:27.289 around the 13 colonies with my mouse\n00:04:29.720 those are the 13 US colonies in a\n00:04:32.450 crucible of crisis at the moment where\n00:04:35.420 they are rebelling against the largest\n00:04:38.210 empire that the world has ever seen that\n00:04:41.360 is the British Empire and they in a very\n00:04:43.700 foolhardy way decided that 13 colonies\n00:04:46.520 with basically no army and no Navy and\n00:04:49.280 no tradition of working together could\n00:04:51.410 fight a war against the most powerful\n00:04:54.070 empire the world had ever seen this is\n00:04:58.850 the concept in which they developed the\n00:05:01.070 idea of public happiness this was going\n00:05:03.470 to be the great shield under which they\n00:05:06.110 would build the first modern Republic\n00:05:09.500 that lasted because many Republic's had\n00:05:13.280 not lasted what did they fear will they\n00:05:15.950 feared enemies on the outside those\n00:05:17.930 would be the British also potentially\n00:05:19.760 the French the Spanish a lot of other\n00:05:21.470 people who didn't exactly wish the\n00:05:23.120 Americans well they feared anarchy\n00:05:25.580 within remember one in every five people\n00:05:27.890 at this time was enslaved what better\n00:05:30.530 opportunity than rebellion to have\n00:05:33.680 another rebellion from within a slave\n00:05:36.110 rebellion they feared tyranny they\n00:05:39.620 feared the return of a king who was\n00:05:42.169 taxing them without representation which\n00:05:45.620 they believed to be the worst kind of\n00:05:47.960 political tyranny and finally they saw\n00:05:51.710 very keenly the vulnerability of\n00:05:55.310 democracy but institutions of government\n00:05:58.490 there that are created by the people and\n00:06:01.040 for the people are inherently subject to\n00:06:04.760 the failures of being human beings it is\n00:06:07.669 difficult to uphold a democracy it is\n00:06:10.190 something that must be renewed every day\n00:06:12.530 so it was within this context that they\n00:06:16.310 called on every citizen to think of the\n00:06:19.370 public happiness don't take it from me\n00:06:22.400 take it from them we're going to spend a\n00:06:24.200 little bit of time with people whose\n00:06:26.660 voices we can recapture today this is\n00:06:30.260 Abigail Adams this is her handwriting\n00:06:32.540 she's writing public happiness this is a\n00:06:35.570 woman who did not have the vote women\n00:06:38.090 wouldn't get the vote until the 20th\n00:06:39.560 century but she in her own own hand\n00:06:42.740 writing just in a random letter is\n00:06:45.289 thinking about public happiness there is\n00:06:47.960 no standardized spelling in the 18th\n00:06:50.150 century so she spells it with a k' so\n00:06:51.560 she's not misspelling it there's there's\n00:06:53.120 actually no way to misspell anything in\n00:06:54.710 the 18th century it's great here's\n00:06:59.389 George Washington there is nothing which\n00:07:02.449 can better deserve your patronage\n00:07:04.849 than the promotion of science and\n00:07:07.310 literature knowledge is in every country\n00:07:10.669 the surest basis of public happiness

we\n00:07:13.940 are standing at Stanford University this\n00:07:16.220 is a monument to the idea of public\n00:07:18.259 happiness that if you educate young\n00:07:19.880 people they will become good citizens\n00:07:21.919 and they will know how to uphold\n00:07:23.300 democracy here's John Adams the\n00:07:26.590 judiciary pulling out one of the three\n00:07:29.000 branches of government the judiciary\n00:07:30.860 system of the United States no subject\n00:07:34.039 is more interesting than this to the\n00:07:37.430 public happiness so the idea of an\n00:07:39.620 independent judiciary free from\n00:07:42.169 influence from the other branches of\n00:07:43.849 government was extremely important to\n00:07:46.250 John Adams here's Thomas Jefferson the\n00:07:50.270 zeal and wisdom of our legislators\n00:07:53.090 another branch of government who lay the\n00:07:55.849 foundations of public happiness in\n00:07:58.780 wholesome laws so he's pulling out the\n00:08:02.270 second branch of government as this\n00:08:04.400 umbrella of public happiness there's\n00:08:07.969 somebody who doesn't have immediate face\n00:08:09.830 recognition but I know you know him this\n00:08:12.620 is Noah Webster you know him as the\n00:08:14.479 great lexicographer the guy who wrote\n00:08:16.940 Webster's dictionary full of new\n00:08:19.009 American words like skunk and canoe that\n00:08:21.919 had entered in the English language in\n00:08:23.539 the 18th century but he was also a great\n00:08:26.780 abolitionist fighting against the great\n00:08:29.330 scourge of the 18th and 19th centuries\n00:08:31.490 which was the bondage of millions of\n00:08:33.919 Africans in the United States slavery he\n00:08:38.120 said impedes the public happiness this\n00:08:42.440 of course would be resolved in the\n00:08:43.969 aftermath of the Civil War that freed 4\n00:08:46.880 million slaves it was all over the press\n00:08:50.839 the idea of public happiness not just in\n00:08:53.480 private letters it is very dangerous\n00:08:56.480 for a nation to have its public\n00:08:58.579 happiness depend on the virtues and\n00:09:01.430 vices of a single man so here we're\n00:09:04.940 pulling out the final branch of\n00:09:06.620 government it's like they're talking to\n00:09:08.120 us you know the final branch of\n00:09:10.370 government the executive branch how it\n00:09:13.699 is so important to shield that branch\n00:09:16.399 from the virtues and vices of a single\n00:09:19.579 man and then finally the document that\n00:09:23.120 they set up to make sure that the public\n00:09:25.399 happiness would would be maintained into\n00:09:28.730 the future to guard our free and happy\n00:09:31.300 Constitution against every machination\n00:09:34.459 and danger and to make it the best\n00:09:36.889 source of public happiness they said\n00:09:39.889 just after the Constitution was ratified\n00:09:45.790 you know democracy is fragile we must\n00:09:50.420 renew it every day what is so wonderful\n00:09:53.930 about listening to the 18th century and\n00:09:56.870 being historian anthropologists is that\n00:10:00.740 we don't know when the moment of\n00:10:03.500 national crisis is we don't know when\n00:10:06.709 the emergency will come but what those\n00:10:09.709 voices from the 18th century tell us is\n00:10:12.560 that there is some thing waiting there\n00:10:15.949 for us an idea that we can use today the\n00:10:20.540 idea of public happiness as the great\n00:10:23.209 shield under which we can defend our\n00:10:26.120 democratic institutions thank\n00:10:33.180 you\n\nThe file is too long and its contents have been truncated.\n", "title": "tactiq-free-transcript-RGSSLAggAyE.txt", "tether_id": null}, {"status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true,

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Through targeted efforts in one's personal life aimed at sustainability, individuals can use these changes as the first step towards guiding society towards more sustainable practices. Personal contributions to sustainability, such as reducing one's carbon footprint, can be quantified using tools like the EPA calculator. By integrating sustainable practices into daily life from reducing water usage and energy consumption to supporting eco-friendly products, individuals begin the process of disengaging from capitalist systems that prioritize profit over sustainability. On a broader scale, if such practices became prevalent in society, they could significantly mitigate environmental degradation and promote a more sustainable and equitable world. As Rangelhi (2018) notes, mindful use of power and resources in philanthropy and other sectors can advance equity and sustainability, influencing societal norms and behaviors towards more responsible stewardship of our planet.

Part 2: Plan for Personal Sustainability

Creating a personal sustainability plan involves incorporating various technical tools and strategies learned in this course to balance work, life, family, economics, social contribution, and environmental impact. Using a concept map, we can visualize how these elements interact and support each other towards achieving sustainability and personal happiness.

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values and interests. Next developing an engagement strategy that includes personalized communication and interaction can help maintain donor interest and commitment. Effective messaging is crucial; it must resonate with potential donors and clearly articulate the impact of their contribution. Planning fundraising events requires meticulous attention to detail ensuring they provide value to attendees and effectively showcase the cause. Finally establishing metrics for success is essential for tracking progress and making necessary adjustments to the fundraising strategy. Each of these elements must be carefully planned and executed to build and sustain donor relationships effectively ultimately supporting the broader goals of the initiative. As Weinstein (2002) emphasizes strategically managing these aspects is vital to achieving successful fundraising outcomes (Weinstein 2002).

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based on the idea that maintaining current donors is more cost-effective and valuable than constantly pursuing new ones. Nigel Harris CEO of the Mater Foundation underscores the importance of taking a long-term view of fundraising focusing on nurturing meaningful connections rather than solely aiming for short-term financial gains (Efrat & Harris 2017). Consequently sustainable fundraising entails ongoing communication and engagement strategies to keep donors informed and involved nurturing a sense of loyalty and deeper commitment to the organization (Waters 2009). Moreover sustainable fundraising employs a strategic proactive approach that integrates a diverse range of fundraising activities specifically tailored to different donor segments. This is exemplified in the Benetton model which employs a systematic engagement process to maintain donor interest and support over time. The model emphasizes continuous donor engagement through regular updates and involvement in the organization's activities fostering a sense of partnership and investment in the long-term success of the organization (Benevon 2015). Thus sustainable fundraising is not just about collecting funds but about building a community of engaged supporters who are committed to the organization's long-term mission and goals. This strategic shift not only enhances the stability of fundraising income but also deepens the organization's impact on its community and beyond.

Part C: Review the 2020 Nonprofit Leadership Impact Study. Based on the findings what information did you find surprising relevant to you and your organization and helpful (please capture all three)?

Surprising: The emphasis on technology and innovation within strategic planning as highlighted in the 2020 Nonprofit Leadership Impact Study was unexpected. This focus reflects a significant shift in the nonprofit sector towards digital transformation emphasizing the critical role technology plays in enhancing organizational reach and operational efficiency. For a concept like the Global Happiness Initiative Foundation (GHIF) which is currently in the ideational phase integrating technology from the outset is crucial to future-proof the organization (Te 2020).

Relevant: The study's focus on leadership development and succession planning is highly pertinent. As GHIF is still in the conceptual stage this insight underscores the importance of establishing strong leadership structures early. This strategic focus ensures that when GHIF transitions from concept to reality it will have a robust framework in place to support sustainable growth and adapt to evolving challenges (Te 2020).

Helpful: Insights on effective communication and donor transparency are particularly valuable. For GHIF these principles will be fundamental to establishing trust and building long-term relationships with future donors and stakeholders. The study highlights the necessity of maintaining open and transparent communication which will be vital as GHIF moves towards actualization ensuring that stakeholder engagement is at the core of its operations (Te 2020). These findings from the study not only provide a theoretical foundation for GHIF but also outline essential strategies for operationalizing such concepts in a real-world nonprofit context. They offer a roadmap for developing GHIF into an organization capable of achieving its mission effectively and sustainably.

Benevon (Director). (2015 January 10). Ten Minutes to Sustainable Funding. https://www.youtube.com/watch?v=XPS_nhwiVyc

Efrat Z. & Harris N. (2017). Driving the case for a sustainable long-term approach to fundraising. Governance Directions 69(1) 6-137.

Hartford Foundation (Director). (2011 September 30). Four Essential Principles of Fundraising. <https://www.youtube.com/watch?v=uy4Un5atFTI>

Te N. (2020). 2020 Nonprofit Leadership Impact Study: Understanding How Traditional Nonprofit Strategy Meets Today's Modern Era.

<https://www.profitpro.com/promo/2020-nonprofit-leadership-impact-study/>\nWaters R. D. (2009). The importance of understanding donor preference and relationship cultivation strategies. Journal of Nonprofit & Public Sector Marketing 21(4)

327\u2013346.\nWeinstein S. (2002). The complete guide to fundraising management (2nd ed). J. Wiley.", "title": "GW DQ6.docx", "tether_id": null}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "parent_id": "1d1bd554-6dd9-4512-a4e7-ad039db77313", "request_id": "8971202b7b890e8d-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, "parent": "1d1bd554-6dd9-4512-a4e7-ad039db77313", "children": [{"id": "52190c29-45c6-4206-86fc-1ee5e9df373e"}], "52190c29-45c6-4206-86fc-1ee5e9df373e": {"id": "52190c29-45c6-4206-86fc-1ee5e9df373e", "message": {"id": "52190c29-45c6-4206-86fc-1ee5e9df373e", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1718942811.719121, "update_time": null, "content": {"content_type": "tether_quote", "url": "file-XHNgN7XRACvBaTcrFPAnmKJvM", "domain": "Week 7_Fundraising in the Context of Nonprofit Strategic Marketing.pdf", "text": "\n59 \n\n \n \n \n \n \n \n \nFUNDRAISING IN THE CONTEXT OF NONPROFIT \nSTRATEGIC MARKETING: \n\nTOWARD A CONCEPTUAL MODEL \n\n\nLjiljana Najev \u0010ca\u0010dija* \n \nReceived: 20. 3. 2013. Review \nAccepted: 23. 4. 2013. UDC: 339.138:061.2>(497.5) \n \n \n \nThe aim of this paper is to present the conceptual basis for examining the effects of \nactivities, performed within the \u201ctraditional\u201d nonprofit strategic marketing, on the \nfundraising success. A review of the existing theoretical and empirical studies in \nthe field of fundraising is provided. Open questions in fundraising are addressed, \nwith the special attention devoted to the identification of marketing activities that \ncould ensure higher fundraising, as well as the overall performance of nonprofit \norganizations. Based on the existing literature, it is proposed that long-term \nrelationships with donors and implementation of the \u201ctraditional\u201d \nmarketing \nactivities are crucial to fundraising, with the fundraising serving as a feedback for \nnonprofit strategic marketing. This paper also analyzes the situation and prospects \nof fundraising in the nonprofit sector in Croatia. Further suggestions for the \nempirical verification of the proposed theoretical model are made, along with the \nrecommendations for future research. \n\n1. INTRODUCTION \n \nNonprofit organizations need resources to achieve organizational goals and \nfulfill their mission, as well as to grow and develop their activities. The \nfundamental categories of required resources are (Andreasen & Kotler, 2008): \n\n\u2012 financial resources (including revenues from products and services), \n\u2012 human resources (employees and volunteers). \n\nAmong those, the success in raising funds is crucial to the performance of \nnonprofit organizations. Fundraising, as the activity directed toward securing \n\n* Ljiljana Najev \u0010ca\u0010dija, University of Split, Faculty of Economics, Cvite Fiskovi\u00107a 5, 21000 \nSplit, Croatia, Phone: +385 98 299 100, E-mail: ljnajev@efst.hr \n\nManagement, Vol. 18, 2013, 1, pp. 59–78 \nLj. Najev \u0010ca\u0010dija: Fundraising in the context of nonprofit strategic marketing\u201d \n\n60 \n\nfinancial resources from donors, is difficult to define. Many authors simply state \nthat it is the collection of funds, or do not provide a definition at all, but rather \nspecify the fundraising activities and tools. \n\nAndreasen and Kotler (2008) define fundraising as an activity of collecting \nfinancial resources and identify the main sources of funds. They emphasize that \nthe nonprofit sector

(fundraising included) has gone through three orientation \nphases in its development, as related to the product, sales and marketing \norientation. Pavi\u010di\u0107 (2003) defines fundraising in terms of its activities and \nbelieves that it could be viewed not only as a part of the overall marketing \nstrategy, but also as a separate strategic and implementation strategic activity. \nSargeant et al. (2010) also do not provide a clear definition of fundraising, but \nrather emphasize the activities and processes required for its successful \nimplementation. Another significant limitation is the orientation of the existing \nliterature toward practical tools and approaches, with many authors serving as \nfundraising practitioners. Although such manuals are important for the practice, \na more strict approach, directed toward the development of fundraising \ndiscipline, is required as well. \n\n \n2. FUNDRAISING: THEORETICAL BASIS \n \nFundraising has reached a marketing orientation in its development, and it \ncan no longer be regarded as a request for money, based on the philanthropic \nmotives, but rather as the exchange of values, which meets the donors\u2019 needs \n(Andreasen & Kotler, 2008). Unfortunately, a large number of nonprofit \norganizations do not share such a marketing orientation to fundraising, as they \nconcentrate on satisfying organizational needs. Thus, fundraising has \nincreasingly become a strategic approach to donors and establishment of long-\nterm relationships, which may not initially generate planned revenues in a short-\ntime perspective. From this viewpoint, there are two approaches to raising funds \n(Sargeant, 2001): \n\n\u2022 the transactional approach, concentrating on the immediate financial \nneeds of an organization, without \nanchoring\u2019 in the developing a \nstrategic plan and \n\n\u2022 the strategic approach, based on the organization\u2019s long-term plan, \nwhich should benefit from the synergy of multiple fundraising projects \nand activities. \n\n \nWarwick (1999) points out that fundraising can do much more than simply \nprovide funds for the organization, as the fundraising objectives may include \ngrowth (creating a donor base), involvement (making donors active), visibility \n\n\n\nManagement, Vol. 18, 2013, 1, pp. 59-78 \nLj. Najev \u010a\u010dija: Fundraising in the context of nonprofit strategic marketing\u2026 \n\n61 \n\n\n(raising organization\u2019s public profile), efficiency (reducing the cost of \nfundraising), stability, etc. Fundamental principles of fundraising are rather \nsimple (Weinstein, 2009). Firstly, people are the basis of the whole fundraising \nprocess, since people decide to give financial support to people (who work in \norganizations) in order to help (other people). Likewise, the importance of the \namount of a small donation should not be diminished, as people donate in \naccordance with the resources available, while the organization not valuing all \ndonated amounts, might be endangering their donor base. Furthermore, the \nleaders, staff and volunteers need to demonstrate the dedication to the \norganization by volunteer work or own donations, in order to convince the \npotential donors of the credibility to ensure the fulfillment of the objectives and \ndeserve\u201d their donations. Therefore, \nsuccessful fundraising is the right person \nasking the right prospect for the right amount for the right project at the right \ntime in the right way.\u201d (Weinstein, op. cit., p. 4). Considering the total amount \nof collected funds and the number of donors, the Pareto principle is also \napplicable: often, 80%, or an even higher amount of funds, come from 20%, or \neven a lower number of donors. \n\n \nAlthough there is no generalized classification of fundraising sources, \npartly due to regional/national characteristics and regulations, sources of \nfunding can generally be (roughly) divided into four main sources (Andreasen \n& Kotler, 2008): donations of

Individual donors, donations of profit entities, \nfor-profit and non-profit foundations; income generated by own activities and \nincome from the partnership with the private sector. Each organization has a \ndifferent ratio of funds from various sources that have been raised in various \nways. The fundraising methods can be classified in the same way as the fund \nsources, depending on the various external factors. One of the frequently quoted \n classifications of fundraising activities is (Sargeant et al., 2010): major gift \nfundraising; direct marketing fundraising; Internet fundraising; retention and \ndevelopment of relations with donors; bequest gift, in memoriam and tribute \ndonation; planned giving; corporate giving, and grant and foundations. \nNonprofit organizations working in different fields and with different goals \nhave different ratio of funds obtained from different sources, but most of the \norganizations depend primarily on donations. \n\n\n3. FUNDRAISING: A REVIEW OF PRIOR RESEARCH \n\n\n3.1. Individual donor characteristics \n\n\nMany studies tried to determine the influence of various factors on the \nbehavior of individual donors, both small and large. Sargeant & Woodliff (2008) \n\n\n\nManagement, Vol. 18, 2013, 1,\n\nThe file is too long and its contents have been truncated.\n", "title": "Week 7_Fundraising in the Context of Nonprofit Strategic Marketing.pdf", "tether_id": null, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "parent_id": "769da98f-d2b7-42fe-8cfb-ce42e03ffd8e", "request_id": "8971202b7b890e8d-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null, "parent": "769da98f-d2b7-42fe-8cfb-ce42e03ffd8e", "children": [{"id": "565b0ea7-6743-4465-a15c-7c8dd6299b7e"}], "565b0ea7-6743-4465-a15c-7c8dd6299b7e": {"id": "565b0ea7-6743-4465-a15c-7c8dd6299b7e", "message": {"id": "565b0ea7-6743-4465-a15c-7c8dd6299b7e", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1718942811.719158, "update_time": null, "content": {"content_type": "text", "parts": ["\nPlease remember to search the user's documents if an answer to their question is not contained in the above snippets.\n"]}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "pad": "AAA", "parent_id": "52190c29-45c6-4206-86fc-1ee5e9df373e", "request_id": "8971202b7b890e8d-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null, "parent": "52190c29-45c6-4206-86fc-1ee5e9df373e", "children": [{"id": "7f6610d8-6582-49e8-873e-f23cb160b643"}], "7f6610d8-6582-49e8-873e-f23cb160b643": {"id": "7f6610d8-6582-49e8-873e-f23cb160b643", "message": {"id": "7f6610d8-6582-49e8-873e-f23cb160b643", "author": {"role": "assistant", "name": null, "metadata": {}}, "create_time": 1718942811.719194, "update_time": null, "content": {"content_type": "text", "parts": ["### Part A: Kara Logan Berlin's Perspective on Money and Personal Feelings\n\nKara Logan Berlin emphasizes the importance of understanding our personal relationships and feelings toward money, which is crucial for those involved in fundraising. This understanding can significantly impact our effectiveness in raising funds. Personally, my view on money is complex; I see it as a necessary tool for achieving freedom and supporting causes I believe in, yet I am also critical of the capitalist system that often prioritizes profit over community welfare. This dual perspective shapes my strategic approach to managing money, ensuring it supports meaningful initiatives without reinforcing systems I critique.\n\n### Part B: Building and Maintaining Relationships in Fundraising\n\nAccording to Hall (2002) and Najev\n\n010ca\n010dija (2013), successful fundraising depends on the strategic establishment

and maintenance of relationships. Hall highlights the role of trust and mutual satisfaction in community college fundraising, while Najev \u010ca\u010dija combines marketing and fundraising strategies to align with donor values and needs. In my practice, I focus on authentic engagement with potential donors, listening to their values, and aligning them with the goals of my initiatives. This fosters deep, lasting partnerships rather than transactional interactions.\n\n### Part C: Strategic Elements in Fundraising\n\nFive critical elements of fundraising that require strategic planning are:\n1. **Donor Identification**: Understanding who will support the cause based on shared values.\n2. **Engagement Strategy**: Personalized communication to maintain donor interest and commitment.\n3. **Messaging and Communication**: Crafting messages that resonate with donors and articulate the impact of their contributions.\n4. **Event Planning**: Ensuring events provide value to attendees and effectively showcase the cause.\n5. **Metrics for Success**: Establishing metrics to track progress and adjust strategies as needed.\n\nEach of these elements must be meticulously planned and executed to build and sustain donor relationships, ultimately supporting the broader goals of the initiative (Weinstein, 2002).\n\n### Part A: Essential Elements of Sustainable Fundraising\n\nTwo essential elements of sustainable fundraising are:\n1. **Longevity of Relationships**: As Nigel Harris from the Mater Foundation points out, nurturing long-term relationships enhances donor retention and organizational stability (Efrat & Harris, 2017).\n2. **Compelling Case Statement**: A clear case statement aligns fundraising efforts with organizational goals, helping donors understand the significance of their contributions (Hartford Foundation, 2011).\n\nThese elements help build a sustainable fundraising approach where donors feel connected to the cause, fostering enduring support.\n\n### Part B: Differences Between Fundraising and Sustainable Fundraising\n\nThe main differences are:\n1. **Strategic Focus**: Traditional fundraising targets immediate financial gains, often leading to one-off campaigns. Sustainable fundraising focuses on long-term donor relationships and retention, which is more cost-effective and valuable.\n2. **Depth of Relationships**: Sustainable fundraising prioritizes ongoing engagement and communication, creating a loyal donor base and deeper commitment to the organization's mission (Weinstein, 2002; Waters, 2009).\n\n### Part C: Insights from the 2020 Nonprofit Leadership Impact Study\n\n**Surprising**: The significant emphasis on technology and innovation in strategic planning, reflecting a shift towards digital transformation in the nonprofit sector (Te, 2020).\n**Relevant**: The focus on leadership development and succession planning is crucial for establishing strong frameworks early in organizational development (Te, 2020).\n**Helpful**: Insights on effective communication and donor transparency are vital for building trust and long-term relationships with donors (Te, 2020).\n\n### Key Takeaways from "Fundraising in the Context of Nonprofit Strategic Marketing"\n\nLjiljana Najev \u010ca\u010dija highlights the crucial role of long-term donor relationships and traditional marketing activities in successful fundraising. This strategic approach transforms fundraising from merely seeking donations to an exchange of values that meets donors' needs. The paper emphasizes the need for nonprofit organizations to adopt a marketing-oriented approach to fundraising, ensuring sustained support and long-term growth (Najev \u010ca\u010dija, 2013)."]\n\n", "status": "finished_successfully", "end_turn": true\n\n, "weight": 1.0, "metadata": {"citations": [], "gizmo_id": null, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "pad": "AAAAAAAAAAAAAAAAAAAA", "parent_id": "565b0ea7-6743-4465-a15c-7c8dd6299b7e", "request_id": "8971202b7b890e8d-

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and justice. By Lisa Ranghelli Oct. 31, 2018 Like air, power is everywhere, yet it is often invisible. We may not think about its role in our daily lives, but we live and breathe it. Used positively, power helps communities thrive. But there's also a dark side. Like polluted air, power becomes most visible when something is wrong when someone abuses it, and the consequences are inescapable.

Foundations often wait to acknowledge inequitable power dynamics and their impact until events force them to a police shooting of an unarmed black person in their community, or a parent deported and their family torn apart. Once power is visible, we see how race, gender, wealth, and other identifiers influence who has power over

whom. https://ssir.org/power_in_philanthropy <https://ssir.org/articles/category/foundations> <https://ssir.org/> This series, presented in partnership with the National Committee for Responsive Philanthropy, aims to explore popular concepts in philanthropy such as risk, capacity building, and public leadership through the lens of power and equitable outcomes. FOLLOW THIS SERIES But even unseen

power can do harm, sometimes unwittingly, as when our health system treats white people better than people of color or our school funding formula disadvantages low-income students. Indeed, it lurks behind every major disparity in access or outcomes for marginalized people. It also hides in foundations' bank accounts and boardrooms, in every meeting with a grant applicant or grant partner, in every community meeting or city council meeting. It can be found in grantmaking practices that inadvertently favor some applicants over

others. Three reasons why funders don't face power head on The best way to deal with power constructively and effectively is to acknowledge it even when it seems invisible. Yet many funders don't. What keeps them from dealing directly with power as a driving force in our communities? Since the National Committee for Responsive Philanthropy released our toolkit for building, sharing, and

wielding power, I have observed three barriers commonly expressed by funders themselves: 1. Foundations lack enough institutional buy-in. People tell us their leaders haven't all bought into the idea that power is essential to advance equity. Can a non-executive staff member make progress without the CEO's support? Or can the CEO tackle power issues without the board's approval? As

Michelle McMurray, senior program officer of health and human services at the Pittsburgh Foundation candidly shared in a recent webinar on sharing

power: Sometimes the seat we sit in, we're kind of in between; we may feel like we don't have the power to make the change. Someone's going to tell us "Not now. Not ever." But do the "first, next thing" you can do you do have some power. Find that, and channel it, and use it for all it's worth. Because the only other option is to do

nothing. https://www.ncrp.org/?utm_source=SSIR https://www.ncrp.org/?utm_source=SSIR https://www.ncrp.org/initiatives/philamplify/power-moves-philanthropy?utm_source=SSIR https://www.ncrp.org/2018/09/philanthropy-experts-swap-tips-on-sharing-power.html?utm_source=SSIR

McMurray was speaking to fellow program officers, but she could just as easily have been addressing a CEO, a vice president, a grants manager, an evaluator, or a communications chief. Everyone within an institution has some point of leverage, some opportunity to act. During a different webinar introducing our toolkit, Marcelo Bonta,

principal at the Raben group, encouraged a small group of change agents to reflect and experiment in one program area or part of the foundation, then to begin to make changes within their sphere and gradually influence other parts of the institution.

For example, a grants manager can develop more inclusive application processes by asking nonprofound leaders of color what prevents them from applying for a grant. A program officer can begin building community power by funding the capacity of grant partners to participate in coalitions. A trustee can advocate for using the foundation's bully pulpit more often.

2. Funders aren't far enough along on diversity, equity, and inclusion (DEI). Many foundations are beginning to look at the extent to which their staff, board, and internal practices reflect DEI values, which requires an examination of dominant white culture. Funders may be hesitant to focus on how to use power externally to advance equity while this internal process is still underway or has not yet begun. One attendee of our toolkit introduction webinar noted: "We've made progress; we've developed communications resources so that we speak in a consistent way about equity in our work. Yet there's no effort to operationalize equity through changing processes and practices. Equity isn't in the water yet. For example, we don't have honest conversations about the white, male, cis-, straight, Western norms in our organization. Can you build, share, and wield power externally if your internal house is not in order?"

Answers to this question depend on each institution's situation, and where board and staff express the most energy or urgency to strengthen DEI practices. Some funders do internal work first, some start externally, and some work on both simultaneously.

During the same webinar, Gita Gulati-Partee, who consults extensively on equity issues as founder and principal of OpenSource Leadership Strategies, noted that a funder can turn off strategy but not https://www.ncrp.org/2018/06/why-examining-power-and-privilege-is-critical-to-shifting-culture-in-philanthropy.html?utm_source=SSIR <http://www.opensourceleadership.com/about.htm>

Yet the two are inseparable; the hip bone is connected to the thigh bone, so to speak. Thus, it may be easier to take a break from strategy to focus on internal culture, but eventually you'll find your way back to strategy.

Regardless of which path you take, it's important to think through and communicate the timing and sequencing of the foundation's process for addressing internal and external aspects of power and equity with staff, board, and constituents in ways that are intentional and transparent. And know that each path will take time and deep effort; board and staff will need to put off other responsibilities to explore power meaningfully.

3. Foundations are afraid to take greater risks. As philanthropic advisor Allen Smart recently noted, philanthropy is generally risk-averse, even though it has more freedom to act boldly and innovate than other sectors of society. CEOs may fear what will happen if they challenge their boards to have tough conversations about power, or if they ask their grant partners for honest feedback. Trustees often see their role as fiduciary stewards and don't want to jeopardize their foundation's endowment. Financial and legal advisors tend toward caution, reinforcing risk aversion. Leaders may fear harm to their own reputation and their institution's if they take a risk and fail.

These are all real and legitimate concerns. However, funders must weigh them against the risks marginalized communities face every day just trying to get by, as well as when they try to speak truth to power,

whether that\u2019s policymakers or foundations. Funders must also consider the risk of inaction\u2014of letting our communities continue to suffer, or of failing to achieve equity goals and perpetuating the status quo. We all engage in power dynamics all the time, whether or not we are aware or acknowledge it. We may unconsciously enable power for some and disable power for others, causing harm or missing opportunities to use power for good. It\u2019s time for us to meditate on power so that we can be more conscious about how each of us manifests it\u2014to notice who benefits and toward what end. In doing so, the obstacles to using it effectively will become surmountable and inspire mindful action.

Support\u2019s coverage of cross-sector solutions to global challenges. https://www.ncrp.org/2018/08/philanthropic-risk-its-personal.html?utm_source=SSIR Help us further the reach of innovative ideas. Donate today. Read more stories by Lisa Ranghelli. Lisa Ranghelli (@lisa_rang) is senior director of assessment and special projects at the National Committee for Responsive Philanthropy (NCRP), and is the primary author of the toolkit *Power Moves: Your essential philanthropy assessment guide for equity and justice*. DOI: 10.48558/cypv-gt68 If you like this article enough to print it, be sure to subscribe to SSIR! Copyright \u00a9 2024 Stanford University. Designed by Arsenal, developed by Hop Studios <https://ssir.org/donate> https://ssir.org/bios/lisa_ranghelli https://www.twitter.com/lisa_rang https://www.ncrp.org/?utm_source=SSIR https://www.ncrp.org/?utm_source=SSIR <https://www.twitter.com/ncrp> https://www.ncrp.org/initiatives/philamplify/power-moves-philanthropy?utm_source=SSIR https://www.ncrp.org/initiatives/philamplify/power-moves-philanthropy?utm_source=SSIR <http://www.hopstudios.com/>

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our work\n\nnon racial equity, have evolved over the past half-century,\n\nand how that history informs our path today.\n\nAt the height of the United States Civil Rights Movement\n\nin the 1960s, the Ford Foundation was looking for new ways to invest its resources in marginalized\n\ncommunities. Already, it had used grants to support individual leaders and institutions\u2014funding\n\nresearch and building \ufffdelds like public interest law\u2014but it was no secret that it would need to do more\n\nto address the tangled root causes of racial inequality. In fact, the national director of the Congress of\n\nRacial Equality, Floyd McKissick, challenged Ford Foundation Vice President Mac Lowry to consider\n\nfunding disparity. One could, as he put it, \u201cget very irritated with foundations, which give \$25,000 to a\n\nman to write a book about the problems of the people who are trying to organize these communities,\n\nbut then refuse to give a nickel to those people who are actually \ufffdghting the problems.\u201d\n\nhttps://ssir.org/articles/category/impact_investing\n\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\n\nhttps://ssir\n\nThe file is too long and its contents have been truncated.\n\n", "title": "Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf", "tether_id": null}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "parent_id": "c902f3ca-1d8b-42ca-9281-9c702aleec5d", "request_id": "89654448eb744c3c-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, "parent": "c902f3ca-1d8b-42ca-9281-9c702aleec5d", "children": ["9ae54965-80fa-44ae-b6b5-c48941068fc8"]}, "9ae54965-80fa-44ae-b6b5-c48941068fc8": {"id": "9ae54965-80fa-44ae-b6b5-c48941068fc8", "message": {"id": "9ae54965-80fa-44ae-b6b5-c48941068fc8", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1718818469.448401, "update_time": null, "content": {"content_type": "text", "parts": ["\nPlease remember to search the user's documents if an answer to their question is not contained in the above snippets.\n"]}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "pad": "AAA", "parent_id": "ddd8aec8-bd49-4b06-be91-61b09e7ffd1f", "request_id": "89654448eb744c3c-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, "parent": "ddd8aec8-bd49-4b06-be91-61b09e7ffd1f", "children": ["56765b19-c234-4e93-ade6-21b80b37bf81"]}, "56765b19-c234-4e93-ade6-21b80b37bf81": {"id": "56765b19-c234-4e93-ade6-21b80b37bf81", "message": {"id": "56765b19-c234-4e93-ade6-21b80b37bf81", "author": {"role": "assistant", "name": null, "metadata": {}}, "create_time": 1718818469.448461, "update_time": null, "content": {"content_type": "code", "language": "unknown", "response_format_name": null, "text": "msearch(['summary', 'ideas presented', 'methodologies', 'concepts discussed', 'relevant contexts'])"}, "status": "finished_successfully", "end_turn": false, "weight": 1.0, "metadata": {"citations": [], "gizmo_id": null, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "parent_id": "9ae54965-80fa-44ae-b6b5-c48941068fc8", "finish_details": {"type": "stop", "stop_tokens": [200007]}, "is_complete": true, "request_id": "89654448eb744c3c-MXP", "timestamp_": "absolute"}, "recipient": "myfiles_browser", "channel": null}, "parent": "9ae54965-80fa-44ae-b6b5-c48941068fc8", "children": ["ade12d0a-f0b9-4934-8201-1b6a3c83cf6b"]}, "ade12d0a-f0b9-4934-8201-1b6a3c83cf6b": {"id": "ade12d0a-f0b9-4934-8201-1b6a3c83cf6b", "message": {"id": "ade12d0a-f0b9-4934-8201-1b6a3c83cf6b", "author": {"role": "tool",

"name": "myfiles_browser", "metadata": {}, "create_time": 1718818469.448522, "update_time": null, "content": {"content_type": "tether_browsing_display", "result": "# \u30100\u2020Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf\u2020file-0RaHilg0q3Lx0iw0SyQ60MGV\u3011\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://ssir.org/images/blog/Ford-Foundation-_592x333.gif\nhttps://www.staymacro.com/\nhttps://www.illumencapital.com/\nhttp://www.fairviewcapital.com/\nhttp://impactamericafund.com/\nhttp://impactamericafund.com/\nhttps://shop.mayvenn.com/about-us\nhttps://career.seo-usa.org/\n\n\nthis approach. We hope that our partners are encouraged by the data; research by Harvard Business\n\nSchool Professor Josh Lerner, commissioned by our colleagues at the Knight Foundation, shows that\n\nmanagers from diverse backgrounds perform as well as their peers. Indeed, as Sherece West-\n\nScantlebury of Winthrop Rockefeller Foundation asks in her essay in this series: Might bias have a role\n\nin causing some to assume otherwise? As we invest in diverse managers today and into the future, we\n\nbelieve we will see more inclusion in the sector, more investment in communities of color, and more\n\nproducts and services championed for individuals and communities of all economic backgrounds.\n\nInvesting in the Future, Building a Movement\n\nThere is no single remedy or short-term solution to the glaring inequities in the capital markets. To\n\neffectively right these structural and institutional wrongs, we must seriously re-evaluate where capital is\n\ngoing and how we make our investments. We will need to continue investing in capacity, as we have\ndone in other \ufffdelds, and over the long term. And as our colleagues at the Kellogg and Mary Reynolds\n\nBabcock foundations, among others, point out, we will need to use every tool at our disposal. Like the\n\nrest of the investment market, not every investment in diverse companies and diverse managers will be\n\na resounding success, so we must learn as we go and stay the course.\n\nAs we conclude this in-depth series, presented in partnership with Mission Investors Exchange, we\n\nstand with a growing movement of organizations. We hope other foundations, pension funds, sovereign\n\nwealth funds, and other institutional investors will join us in this pursuit of justice and greater returns,\n\nand step forward to ask the hard questions\u2014as Robert Ross and Amy Chung of The California\n\nEndowment note in this series\u2014to achieve meaningful organizational change. We are heartened by the\n\nrecent announcement by the Kresge Foundation to move 25 percent of its assets under the control of\n\nwomen and \ufffdrms led by people of color by 2025. Together, we can address these gaps at every level, and\n\ndirect our resources toward greater equity, prosperity, and progress.\n\nSupport\u2019s coverage of cross-sector solutions to global challenges.\n\nHelp us further the reach of innovative ideas.\n\nDonate today.\n\nRead more stories by Roy Swan & Darren Walker.\n\nRoy Swan is director of mission investments at the Ford Foundation. Before joining Ford, he served as managing director and\n\nco-head of global sustainable \ufffdnance at Morgan Stanley; founding chief investment o\ufffdcer of New York City\u2019s Upper Manhattan\n\n#\u30101\u2020Capital for Justice_ Spurring On Impact Investing for Racial

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diversity/3379185002/\nhttps://ssir.org/donate\nhttps://ssir.org/bios/roy_swan\nhttps://ssir.org/bios/darren_walker\nhttps://www.fordfoundation.org/\n\nEmpowerment Zone; and chief financial officer at Carver Bancorp, a Harlem-based, publicly traded financial institution and the nation's largest African American-managed bank. \n\nDarren Walker (@darrenwalker) is president of the Ford Foundation, an international social justice philanthropy with a \$13 billion endowment and \$600 million in annual grant making. He chaired the philanthropy committee that brought a resolution to the city of Detroit's historic bankruptcy, and is co-founder and chair of the US Impact Investing Alliance. \nDOI:

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Studios\n\nhttps://twitter.com/darrenwalker\nhttps://www.fordfoundation.org/\nhttp://www.hopstudios.com/\n# \u30102\u2020Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf\u2020file-ORaHilg0q3Lx0iw0SyQ60MGV\u3011\nThere is no single remedy or short-term solution to the glaring inequities in the capital markets.

To\n\nEffectively right these structural and institutional wrongs, we must seriously re-evaluate where capital is\n\ngoing and how we make our investments. We will need to continue investing in capacity, as we have\ndone in other fields, and over the long term. And as our colleagues at the Kellogg and Mary Reynolds\n\nBabcock foundations, among others, point out, we will need to use every tool at our disposal. Like the\n\nrest of the investment market, not every investment in diverse companies and diverse managers will be\n\na resounding success, so we must learn as we go and stay the course. \n\nAs we conclude this in-depth series, presented in partnership with Mission Investors Exchange, we\n\nstand with a growing movement of organizations. We hope other foundations, pension funds, sovereign\n\nwealth funds, and other institutional investors will join us in this pursuit of justice and greater returns,\n\nand step forward to ask the hard questions\n\nas Robert Ross and Amy Chung of The California\n\nEndowment note in this series\n\nto achieve meaningful organizational change. We are heartened by the\n\nrecent announcement by the Kresge Foundation to move 25 percent of its assets under the control of\n\nwomen and firms led by people of color by 2025. Together, we can address these gaps at every level, and\n\ndirect our resources toward greater equity, prosperity, and progress. \n\nSupport\n\nSSIR's\n\n2019s coverage of cross-sector solutions to global challenges. \n\nHelp us further the reach of innovative ideas. \n\nDonate today. \n\nRead more stories by Roy Swan & Darren Walker. \n\nRoy Swan is director of mission investments at the Ford Foundation. Before joining Ford, he served as managing director and\n\nco-head of global sustainable finance at Morgan Stanley; founding chief investment officer of New York City's Upper

Manhattan\nhttps://www.knightfoundation.org/reports/diversifying-investments-a-study-of-ownership-diversity-and-performance-in-the-asset-management-industry\nhttps://www.knightfoundation.org/reports/diversifying-investments-a-study-of-ownership-diversity-and-performance-in-the-asset-management-industry\nhttps://ssir.org/articles/entry/aligning_purpose_and_investments_why_are_you_stuck\nhttps://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity\nhttps://ssir.org/articles/entry/five_practices_for_developing_and_staying_accountable_to_racial_equity_goals\nhttps://www.detroitnews.com/story/news/local/detroit-city/2019/04/05/kresge-abfe-rapson-assets-diversity/3379185002/\nhttps://ssir.org/donate\nhttps://ssir.org/bios/roy_swan\nhttps://ssir.org/bios/darren_walker\nhttps://www.fordfoundation.org/\n\n\nEmpowerment Zone; and chief financial officer at Carver Bancorp, a Harlem-based, publicly traded financial institution and the nation's largest African American-managed bank. \n\nDarren Walker (@darrenwalker) is president of the Ford Foundation, an international social justice philanthropy with a \$13 billion endowment and \$600 million in annual grant making. He chaired the philanthropy committee that brought a resolution to the city of Detroit's historic bankruptcy, and is co-founder and chair of the US Impact Investing Alliance. \n\nDOI: 10.48558/y52x-gt95\n\nIf you like this article enough to print it, be sure to subscribe to SSIR!\n\nCopyright © 2024 Stanford University. \nDesigned by Arsenal, developed by Hop Studios\n# 301032020Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf2020file-0RaHilg0q3Lx0iw0SyQ60MGV3011\nhttps://ssir.org/articles/category/impact_investing\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity\nhttps://www.fordfoundation.org/\nhttps://ssir.org/\n\n\nHow Foundations Are Using Impact Investing to Advance Racial Equity\n\nIn this series, presented in partnership with Mission Investors Exchange, 10 foundation presidents share their organization's efforts to embed commitments to racial equity into their institutions and impact investing practices. \n\nFOLLOW THIS SERIES\n\nThe comment typified a larger, ongoing conversation about how a foundation like Ford could invest its capital in the people and communities closest to social problems. By 1968, spurred on by such critiques and the urgency of advancing racial equity, the foundation had helped pioneer an innovative tool intended to unlock new philanthropic resources: program-related investments (PRIs). Early on, the foundation committed \$10 million to PRIs, and among the first initiatives was Rev. Leon Sullivan's Progress Plaza, the first shopping center in the United States owned and run by African Americans. By directing capital to communities and entrepreneurs long denied it, PRIs could complement the foundation's broader strategy for economic empowerment, racial equity, and social justice. \n\nIn the 50 years since the development of PRIs, the Ford Foundation's fight for racial equity and our use of new impact investing tools have gone hand in hand. As time has passed and tools and circumstances have

changed, we've continuously looked for new ways to answer a version of that original question: How do we get more capital to the people and communities who truly need it? Beginning in the 1980s in an effort to confront inequalities caused by racially biased bank practices, discrimination, and redlining we made grants and PRIs to develop and scale the community development financial institution (CDFI) and affordable housing industries. Today, we use many types of resources to address inequality, and specifically racial and gender inequality, in all its forms. These include grants in our gender, racial, and ethnic justice program; PRIs; and mission-related investments committed from our endowment. While our philanthropic investment used to focus on only 5 percent of our resources, we are beginning to unlock the other 95 percent toward this goal, with a recent commitment to allocate up to \$1 billion of the endowment for a new mission-related investment strategy.

Two Interrelated Gaps: Investment and Investment Managers

Without adequate capital, entrepreneurs cannot develop their ideas and products into sustainable, well-organized enterprises that bring meaningful value to them and their customers. Yet as others have thoughtfully considered throughout this series when it comes to receiving venture capital and private equity, founders of color are not given the same support as their white counterparts. Black women especially continue to lack venture capital funding, despite being according to Bari Williams in Fast Company's "Capital for Justice: Spurring On Impact Investing for Racial Equity." Leon Sullivan's Progress Plaza, in Philadelphia, Pennsylvania, was the first shopping center in the United States owned and run by African Americans. (Photo courtesy of Ford Foundation)

Impact Investing

Capital for Justice: Spurring On Impact Investing for Racial Equity

How one foundation is building on a 50-year history of impact investing to unlock more capital and more justice toward greater equity, progress, and prosperity.

By Roy Swan & Darren Walker Apr. 29, 2019

Throughout this article series, it has been fascinating and encouraging to read the authors' reflections on the importance of putting racial equity at the center of the impact investing movement and the most effective ways of doing so at this pivotal moment. In preparing our contribution, we have been thinking about how the Ford Foundation's use of impact investing tools, and our work on racial equity, have evolved over the past half-century, and how that history informs our path today.

At the height of the United States Civil Rights Movement in the 1960s, the Ford Foundation was looking for new ways to invest its resources in marginalized communities. Already, it had used grants to support individual leaders and institutions funding research and building fields like public interest law but it was no secret that it would need to do more to address the tangled root causes of racial inequality. In fact, the national director of the Congress of Racial Equality, Floyd McKissick, challenged Ford Foundation Vice President Mac Lowry to consider funding disparity. One could, as he put it, get very irritated with foundations, which give \$25,000 to a man to write a book about the problems of the people who are trying to organize these communities, but then refuse to give a nickel to those people who are actually fighting the problems.

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were going\n01:01:15.750 make decisions that you have to walk in\n01:01:17.460 there
knowing if I get 60% that's a\n01:01:20.670 great day and tomorrow I'll wake
up and\n01:01:24.210 make another decision but do it with a\n01:01:27.750 way and with
a focus and with a belief\n01:01:29.820 that the decisions that you are
making\n01:01:31.710 and the choices that you were making of\n01:01:33.510 when to use
your voice that they are\n01:01:35.220 being led by something deep that
they're\n01:01:38.460 being led by a commitment to the work\n01:01:40.200 that
they're being led by a commitment\n01:01:43.380 to justice that they're
being led by a\n01:01:46.260 commitment to progress because if that\n01:01:49.440
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diversity/3379185002/\nhttps://ssir.org/donate\nhttps://ssir.org/bios/roy_swan\nhttps://ssir.org/bios/darren_walker\nhttps://www.fordfoundation.org/\n\n\nEmpowerment Zone; and chief \ufffdnancial o\ufffdcer at Carver Bancorp, a Harlem-based, publicly traded\n\n\ufffdnancial institution and the nation\u2019s largest African American-managed bank.\n\nDarren Walker (@darrenwalker)\u00a0is\u00a0president of the Ford Foundation, an international social justice\n\nphilanthropy with a \$13 billion endowment and \$600 million in annual grant making. He chaired the\n\nphilanthropy committee that brought a resolution to the city of Detroit\u2019s historic bankruptcy, and is co-\n\nfounder and chair of the US Impact Investing Alliance.\n\nDOI:

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Studios\n\nhttps://twitter.com/darrenwalker\nhttps://www.fordfoundation.org/\nhttp://www.hopstudios.com/\n", "extra": null}, {"type": "file", "name": "Capital for Justice_Spurring On Impact Investing for Racial Equity.pdf", "id": "file-ORaHilg0q3Lx0iwOSyQ60MGV", "source": "my_files", "text": "\nThere is no single remedy or short-term solution to the glaring inequities in the capital markets.

To\n\n\ufffdectively right these structural and institutional wrongs, we must seriously re-evaluate where capital is\n\n\ngoing and how we make our investments. We will need to continue investing in capacity, as we have\n\ndone in other \ufffdelds, and over the long term. And as our colleagues at the Kellogg and Mary Reynolds\n\nBabcock foundations, among others, point out, we will need to use every tool at our disposal. Like the\n\nrest of the investment market, not every investment in diverse companies and diverse managers will be\n\na resounding success, so we must learn as we go and stay the course.\n\n\nAs we conclude this in-depth series, presented in partnership with Mission Investors Exchange, we\n\nstand with a growing movement of organizations. We hope other foundations, pension funds, sovereign\n\nwealth funds, and other institutional investors will join us in this pursuit of justice and greater returns,\n\nand step forward to ask the hard questions\u2014as Robert Ross and Amy Chung of The California\n\nEndowment note in this series\u2014to achieve meaningful organizational change. We are heartened by the\n\nrecent announcement by the Kresge Foundation to move 25 percent of its assets under the control of\n\nwomen and \ufffdrms led by people of color by 2025. Together, we can address these gaps at every level, and\n\ndirect our resources toward greater equity, prosperity, and progress.\n\n\nSupport\u00a0SSIR\u2019s coverage of cross-sector solutions to global challenges.\u00a0\n\nHelp us further the reach of innovative ideas.\u00a0\n\nDonate today.\n\n\nRead more stories by Roy Swan & Darren Walker.\n\n\nRoy Swan is director of mission investments at the Ford Foundation. Before joining Ford, he served as managing director and\n\nco-head of global sustainable \ufffdnance at Morgan Stanley; founding chief investment o\ufffdcer of New York City\u2019s Upper Manhattan\n\n\nhttps://www.knightfoundation.org/reports/diversifying-investments-a-study-of-ownership-diversity-and-performance-in-the-asset-management-industry\n\nhttps://www.knightfoundation.org/reports/diversifying-investments-a-study-of-ownership-diversity-and-performance-in-the-asset-management-industry\n\nhttps://ssir.org/articles/entry/aligning_purpose_and_investments_why_are_you_stuck\n\nhttps://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity\n\nhttps://ssir.org/articles/entry/five_practices_for_developing_and_staying_accountable_to_racial_equity_goals\n\nhttps://www.detroitnews.com/story/news/local/detroit-city/2019/04/05/kresge-abfe-rapson-assets-

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gender inequality, in all its forms. These include grants in our gender, racial, and ethnic justice program; PRIs; and mission-related investments committed from our endowment. While our philanthropic investment used to focus on only 5 percent of our resources, we are beginning to unlock the other 95 percent toward this goal, with a recent commitment to allocate up to \$1 billion of the endowment for a new mission-related investment strategy.

Two Interrelated Gaps: Investment and Investment Managers Without adequate capital, entrepreneurs cannot develop their ideas and products into sustainable, well-organized enterprises that bring meaningful value to them and their customers. Yet as others have thoughtfully considered throughout this series when it comes to receiving venture capital and private equity, founders of color are not given the same support as their white counterparts. Black women especially continue to lack venture capital funding, despite being according to Bari Williams in Fast

“file”, “name”: “Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf”, “id”: “file-0RaHilg0q3Lx0iw0SyQ60MGV”, “source”: “my_files”, “text”: “Rev. Leon Sullivan’s Progress Plaza, in Philadelphia, Pennsylvania, was the first shopping center in the United States owned and run by African Americans. (Photo courtesy of Ford Foundation) Impact Investing Capital for Justice: Spurring On Impact Investing for Racial Equity How one foundation is building on a 50-year history of impact investing to unlock more capital and more justice toward greater equity, progress, and prosperity. By Roy Swan & Darren Walker Apr. 29, 2019 Throughout this article series, it has been fascinating and encouraging to read the authors’ reflections on the importance of putting racial equity at the center of the impact investing movement and the most effective ways of doing so at this pivotal moment. In preparing our contribution, we have been thinking about how the Ford Foundation’s use of impact investing tools, and our work on racial equity, have evolved over the past half-century, and how that history informs our path today. At the height of the United States Civil Rights Movement in the 1960s, the Ford Foundation was looking for new ways to invest its resources in marginalized communities. Already, it had used grants to support individual leaders and institutions funding research and building fields like public interest law but it was no secret that it would need to do more to address the tangled root causes of racial inequality. In fact, the national director of the Congress of Racial Equality, Floyd McKissick, challenged Ford Foundation Vice President Mac Lowry to consider funding disparity. One could, as he put it, get very irritated with foundations, which give \$25,000 to a man to write a book about the problems of the people who are trying to organize these communities, but then refuse to give a nickel to those people who are actually fighting the problems. https://ssir.org/articles/category/impact_investing https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif https://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity https://www.fordfoundation.org https://ssir.org How Foundations

Are Using Impact Investing to Advance Racial Equity

In this series, presented in partnership with Mission Investors Exchange, 10 foundation presidents share their organization's efforts to embed commitments to racial equity into their institutions and impact investing practices.

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Roy Swan is director of mission investments at the Ford Foundation. Before joining Ford, he served as managing director and co-head of global sustainable finance at Morgan Stanley; founding chief investment officer of New York City's Upper Manhattan Capital for Justice. Spurring On Impact Investing for Racial Equity. pdf

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Empowerment Zone; and chief financial officer at Carver Bancorp, a Harlem-based, publicly traded financial institution and the nation's largest African American-managed bank.

Darren Walker (@darrenwalker) is president of the Ford Foundation, an international social justice philanthropy with a \$13 billion endowment and \$600 million in annual grant making. He chaired the philanthropy committee that brought a resolution to the city of Detroit's historic bankruptcy,

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Empowerment Zone; and chief financial officer at Carver Bancorp, a Harlem-based, publicly traded financial institution and the nation's largest African American-managed bank.

Darren Walker (@darrenwalker) is president of the Ford Foundation, an international social justice philanthropy with a \$13 billion endowment and \$600 million in annual grant making. He chaired the philanthropy committee that brought a resolution to the city of Detroit's historic bankruptcy, and is co-founder and chair of the US Impact Investing Alliance. DOI:

10.48558/y52x-gt95\n\nIf you like this article enough to print it, be sure to subscribe to SSIR!\n\nCopyright \u00a9 2024 Stanford University.\nDesigned by Arsenal, developed by Hop Studios\n# \u0020Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf\u0020file-0RaHilg0q3Lx0iw0SyQ6OMGV\u002011\nhttps://ssir.org/articles/category/impact_investing\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity\nhttps://www.fordfoundation.org/\nhttps://ssir.org/\n\nHow Foundations Are Using Impact Investing to Advance Racial Equity\n\nIn this series, presented in partnership with Mission Investors Exchange, 10 foundation\npresidents share their organization\u0020s efforts to embed commitments to racial equity into their\ninstitutions and impact investing practices.\n\nFOLLOW THIS SERIES\n\nThe comment typified a larger, ongoing conversation about how a foundation like Ford could invest its\ncapital in the people and communities closest to social problems. By 1968, spurred on by such critiques\nand the urgency of advancing racial equity, the foundation had helped pioneer an innovative tool\nintended to unlock new philanthropic resources: program-related investments (PRIs). Early on, the\nfoundation committed \$10 million to PRIs, and among the first initiatives was Rev. Leon Sullivan\u0020s\nProgress Plaza, the first shopping center in the United States owned and run by African Americans. By\ndirecting capital to communities and entrepreneurs long denied it, PRIs could complement the\nfoundation\u0020s broader strategy for economic empowerment, racial equity, and social justice.\n\nIn the 50 years since the development of PRIs, the Ford Foundation\u0020s efforts for racial equity and our use\nof new impact investing tools have gone hand in hand. As time has passed and tools and circumstances\nhave changed, we\u0020ve continuously looked for new ways to answer a version of that original question:\nHow do we get more capital to the people and communities who truly need it?\n\nBeginning in the 1980s\u0020in an effort to confront inequalities caused by racially biased bank practices,\ndiscrimination, and redlining\u0020we made grants and PRIs to develop and scale the community\ndevelopment financial institution (CDFI) and affordable housing industries. Today, we use many types\nhttps://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity\n\nof resources to address inequality, and specifically racial and gender inequality, in all its forms. These\ninclude grants in our gender, racial, and ethnic justice program; PRIs; and mission-related investments\ncommitted from our endowment. While our philanthropic investment used to focus on only 5 percent of\nour resources, we are beginning to unlock the other 95 percent toward this goal, with a recent\ncommitment to allocate up to \$1 billion of the endowment for a new mission-related investment\nstrategy.\n\nTwo Interrelated Gaps: Investment and Investment\nManagers\n\nWithout adequate capital, entrepreneurs cannot develop their ideas and products into sustainable, well-\norganized enterprises that bring meaningful value to them and their customers. Yet\u0020as others have\nthoughtfully

considered throughout this series when it comes to receiving venture capital and private equity, founders of color are not given the same support as their white counterparts. Black women especially continue to lack venture capital funding, despite being according to Bari Williams in Fast Company's "Capital for Justice: Spurring On Impact Investing for Racial Equity." file-ORaHilg0q3Lx0iw0SyQ6OMGV\u3011\nRev. Leon Sullivan's Progress Plaza, in Philadelphia, Pennsylvania, was the first shopping center in the United States owned and run by African Americans. (Photo courtesy of Ford Foundation)

Impact Investing Capital for Justice: Spurring On Impact Investing for Racial Equity

How one foundation is building on a 50-year history of impact investing to unlock more capital and more justice toward greater equity, progress, and prosperity.

By Roy Swan & Darren Walker Apr. 29, 2019

Throughout this article series, it has been fascinating and encouraging to read the authors' reflections on the importance of putting racial equity at the center of the impact investing movement and the most effective ways of doing so at this pivotal moment. In preparing our contribution, we have been thinking about how the Ford Foundation's use of impact investing tools, and our work on racial equity, have evolved over the past half-century, and how that history informs our path today.

At the height of the United States Civil Rights Movement in the 1960s, the Ford Foundation was looking for new ways to invest its resources in marginalized communities. Already, it had used grants to support individual leaders and institutions funding research and building fields like public interest law but it was no secret that it would need to do more to address the tangled root causes of racial inequality. In fact, the national director of the Congress of Racial Equality, Floyd McKissick, challenged Ford Foundation Vice President Mac Lowry to consider funding disparity. One could, as he put it, get very irritated with foundations, which give \$25,000 to a man to write a book about the problems of the people who are trying to organize these communities, but then refuse to give a nickel to those people who are actually fighting the problems.

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https://ssir.org/how_foundations_are_using_impact_investing_to_advance_racial_equity

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How Foundations Are Using Impact Investing to Advance Racial Equity

In this series, presented in partnership with Mission Investors Exchange, 10 foundation presidents share their organization's efforts to embed commitments to racial equity into their institutions and impact investing practices.

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the\n\nfoundation committed \$10 million to PRIs, and among the \uffffdrst initiatives was Rev. Leon Sullivan\u2019s\n\nProgress Plaza, the \uffffdrst shopping center in the United States owned and run by African Americans. By\n\nndirecting capital to communities and entrepreneurs long denied it, PRIs could complement the\n#\n\u30105\u2020tactiq-free-transcript-09uEQ4MoyWI.txt\u2020file-RKgT2tm8qf6y9031AXT3geeH\u3011\n420 you're gonna ask to use your voice and\n01:00:57.920 really new and creative ways none of you\n01:01:02.030 will ever make a decision that you will\n01:01:03.620 get a hundred percent of the people who\n01:01:05.090 think it's a good decision if you are\n01:01:06.710 making decisions that 100 percent of the\n01:01:08.330 people think are good decisions you're\n01:01:09.740 not making real decisions you're not you\n01:01:15.350 were going\n01:01:15.750 make decisions that you have to walk in\n01:01:17.460 there knowing if I get 60% that's a\n01:01:20.670 great day and tomorrow I'll wake up and\n01:01:24.210 make another decision but do it with a\n01:01:27.750 way and with a focus and with a belief\n01:01:29.820 that the decisions that you are making\n01:01:31.710 and the choices that you were making of\n01:01:33.510 when to use your voice that they are\n01:01:35.220 being led by something deep that they're\n01:01:38.460 being led by a commitment to the work\n01:01:40.200 that they're being led by a commitment\n01:01:43.380 to justice that they're being led by a\n01:01:46.260 commitment to progress because if that\n01:01:49.440 becomes a thing if that becomes\nVisible: 0% - 26%, "extra": null}], "original_query": null, "command": "msearch", "args": [{"summary", "ideas presented", "methodologies", "concepts discussed", "relevant contexts"}], "status": "finished", "is_complete": true, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "parent_id": "56765b19-c234-4e93-ade6-21b80b37bf81", "request_id": "89654448eb744c3c-MXP", "timestamp_": "absolute", "recipient": "all", "channel": null, "parent": "56765b19-c234-4e93-ade6-21b80b37bf81", "children": [{"6ac9641c-e829-47a5-8cee-138dcc636dee"}], "6ac9641c-e829-47a5-8cee-138dcc636dee": {"id": "6ac9641c-e829-47a5-8cee-138dcc636dee", "message": {"id": "6ac9641c-e829-47a5-8cee-138dcc636dee", "author": {"role": "assistant", "name": null, "metadata": {}}, "create_time": 1718818469.448583, "update_time": null, "content": {"content_type": "text", "parts": [{"### Summary\n\nThe documents provided revolve around the theme of advancing equity through mindful power usage by grantmakers and impact investing, specifically targeting racial equity.\n\n1. **How Grantmakers Can Use Power Mindfully to Advance Equity**\n - Introduction to mindful power usage\n - Strategies for equitable grantmaking\n - Importance of reflection and adaptation\n - Case studies and examples\n\n2. **Capital for Justice: Spurring On Impact Investing for Racial Equity**\n - Historical context of impact investing for racial equity\n - The evolution of the Ford Foundation\u2019s impact investing\n - Current initiatives and strategies\n - The role of diverse managers and communities in investment\n - Long-term goals and partnership encouragement\n\n3. **Transcripts**\n - Leadership and decision-making challenges\n - The role of personal commitment in leadership\n - Strategies for

effective and equitable decision-making\n - Reflections on justice and progress in organizational contexts\n\n### Overall Synthesis\n\nThe documents collectively emphasize the critical role of intentional and mindful practices in promoting equity, particularly racial equity. The overarching ideas presented include:\n\n- **Intentional Grantmaking and Investment:** Both the grantmakers and impact investors are urged to deliberate thoughtfully on how their resources are allocated to support marginalized communities.\n- **Historical Context and Evolution:** Understanding the historical context of racial inequities is crucial in shaping current strategies. The Ford Foundation\u2019s transition from traditional grantmaking to innovative impact investing demonstrates this evolution.\n- **Commitment to Justice:** There is a strong emphasis on personal and organizational commitment to justice. Leaders are encouraged to make decisions driven by deeper values and a commitment to progress, even when faced with challenges or opposition.\n- **Community and Diversity Focus:** Both documents stress the importance of directing resources towards diverse managers and underserved communities, recognizing the potential of these groups to contribute significantly to societal progress.\n- **Learning and Adaptation:** Acknowledging that not all initiatives will succeed, there is an emphasis on learning from experiences and continuously adapting strategies to better serve equity goals.\n\n### Methodologies and Concepts\n\n1. **Mindful Power Usage (Grantmaking)**\n- Reflection on power dynamics\n- Strategies for equitable resource distribution\n- Adapting grantmaking practices based on feedback and outcomes\n\n2. **Impact Investing for Racial Equity**\n- Program-related investments (PRIs)\n- Community development financial institutions (CDFIs)\n- Partnerships with diverse managers and institutions\n- Long-term commitments to racial and gender equity\n\n### Relevant Contexts\n\n- **Historical Inequities:** The documents place significant importance on the historical context of racial and economic disparities, which informs current practices and strategies.\n- **Philanthropy and Social Justice:** The role of foundations and philanthropic organizations is highlighted as pivotal in addressing and rectifying these disparities through both financial investments and grantmaking.\n- **Leadership in Equity:** Effective leadership in advancing equity is discussed, focusing on decision-making, commitment, and the importance of leading with justice-oriented values.\n\nBy integrating these concepts, the documents provide a comprehensive guide for organizations and leaders seeking to use their power and resources to foster a more equitable society.]}, "status":

"finished_successfully", "end_turn": true, "weight": 1.0, "metadata": {"citations": [], "gizmo_id": null, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "pad": "AAAAAAAA", "parent_id": "adel2d0a-f0b9-4934-8201-1b6a3c83cf6b", "finish_details": {"type": "stop", "stop_tokens": [200002]}, "is_complete": true, "request_id": "89654448eb744c3c-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, "parent": "adel2d0a-f0b9-4934-8201-1b6a3c83cf6b", "children": ["aaa2e7c1-d083-41de-94d4-4e4aa208c84c"]}, {"id": "aaa2e7c1-d083-41de-94d4-4e4aa208c84c", "message": {"id": "aaa2e7c1-d083-41de-94d4-4e4aa208c84c", "author": {"role": "user", "name": null, "metadata": {}}, "create_time": 1718818665.997267, "update_time": null, "content": {"content_type": "text", "parts": ["tell me more about impact investing including those facts gleaned from the attachments and also what you might generally know. "]}}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"request_id": "896549f4ed64bb13-MXP", "message_source": null, "timestamp_": "absolute", "message_type": null}, "recipient": "all", "channel": null},

parent": "6ac9641c-e829-47a5-8cee-138dccc636dee", "children": [{"ed0870ad-d052-4964-917b-b7e1a47cf909"}], "ed0870ad-d052-4964-917b-b7e1a47cf909": {"id": "ed0870ad-d052-4964-917b-b7e1a47cf909", "message": {"id": "ed0870ad-d052-4964-917b-b7e1a47cf909", "author": {"role": "assistant", "name": null, "metadata": {}}, "create_time": 1718818706.045343, "update_time": null, "content": {"content_type": "text", "parts": ["### Impact Investing: An Overview\n\n**Impact investing** is the practice of investing with the intention to generate positive, measurable social and environmental impact alongside a financial return. This approach recognizes that capital can be a powerful tool for addressing some of the world's most pressing challenges.\n\n#### Key Points from the Attachments\n\n1. **Historical Context and Evolution (Ford Foundation)**\n\n- The Ford Foundation has a long history of impact investing, starting from the Civil Rights Movement in the 1960s.\n\n- Initially, the foundation supported individual leaders and institutions through grants but later recognized the need for more direct investment in marginalized communities.\n\n- The Ford Foundation's impact investing efforts include the development of shopping centers owned and operated by African Americans, such as Progress Plaza in Philadelphia.\n\n2. **Current Initiatives and Strategies**\n\n- The foundation focuses on integrating racial equity into its impact investing strategies.\n\n- Emphasis on hiring diverse managers and investing in communities of color.\n\n- The use of program-related investments (PRIs) and community development financial institutions (CDFIs) to drive investments that support racial and gender equity.\n\n- Encouragement of partnerships that prioritize the inclusion of marginalized groups in economic opportunities.\n\n3. **Long-term Goals**\n\n- The Ford Foundation aims to unlock more capital and achieve greater justice and equity through its investments.\n\n- The strategy involves not just immediate financial returns but also long-term societal benefits, particularly in advancing racial equity and justice.\n\n#### General Concepts and Principles of Impact Investing\n\n1. **Dual Objectives**\n\n- Impact investors seek to achieve both financial returns and positive social or environmental outcomes.\n\n- This dual objective distinguishes impact investing from traditional investing, which primarily focuses on financial returns.\n\n2. **Measurement and Reporting**\n\n- Impact investing requires rigorous measurement and reporting of both financial performance and social/environmental impact.\n\n- Tools and frameworks such as the Global Impact Investing Rating System (GIIRS) and the Impact Reporting and Investment Standards (IRIS) are commonly used.\n\n3. **Sectors and Themes**\n\n- Impact investments span various sectors, including renewable energy, education, healthcare, affordable housing, and microfinance.\n\n- Common themes include sustainability, poverty alleviation, gender equality, and racial equity.\n\n4. **Types of Impact Investments**\n\n- **Equity Investments:** Providing capital to enterprises in exchange for ownership stakes.\n\n- **Debt Investments:** Offering loans or credit to organizations with the expectation of repayment with interest.\n\n- **Program-Related Investments (PRIs):** Investments that align with philanthropic missions and often come with concessionary terms.\n\n- **Social Impact Bonds (SIBs):** Pay-for-success contracts where investors are repaid based on the achievement of specific social outcomes.\n\n5. **Stakeholders in Impact Investing**\n\n- **Foundations and Philanthropic Organizations:** Use endowment funds to invest in social causes.\n\n- **Institutional Investors:** Pension funds, insurance companies, and other large investors increasingly incorporate impact investments into their portfolios.\n\n- **Individual Investors:** High-net-worth individuals and retail investors are also

participating through impact investment funds and platforms. \n - **Government and Multilateral Organizations:** Support impact investing through policy, funding, and partnerships. \n6. **Challenges and Considerations** \n - **Measuring Impact:** Quantifying social and environmental outcomes can be complex and context-specific. \n - **Balancing Returns:** Ensuring that financial returns do not compromise the social/environmental mission. \n - **Market Development:** Building the necessary infrastructure and markets to support impact investing. \n - **Risk Management:** Navigating risks unique to impact investing, such as political or regulatory changes. \n\n### Examples of Impact Investing in Practice \n\n- **Renewable Energy Projects:** Investing in solar, wind, and other renewable energy projects to combat climate change while generating returns. \n- **Affordable Housing:** Financing the development of affordable housing units to address homelessness and housing insecurity. \n- **Microfinance:** Providing small loans to entrepreneurs in developing countries to spur economic development and reduce poverty. \n- **Healthcare Initiatives:** Funding healthcare startups or community health programs to improve access to medical services in underserved areas. \n\n### Conclusion \n\nImpact investing represents a powerful approach to using capital for social good, combining the rigor of financial investment with the mission-driven goals of philanthropy. As demonstrated by the Ford Foundation's initiatives, it requires a deep commitment to equity, strategic partnerships, and a focus on long-term societal benefits. This investment strategy is increasingly recognized as essential for addressing global challenges and fostering inclusive economic growth. "}], "status": "finished_successfully", "end_turn": true

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communities,\n\nbut then refuse to give a nickel to those people who are actually \ufffdighting the problems.\u201d\n\nhttps://ssir.org/articles/category/impact_investing\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir\nThe file is too long and its contents have been truncated.\n", "extra": {"cited_message_idx": 7, "search_result_idx": null, "evidence_text": "source", "cloud_doc_url": null}}}, {"start_ix": 1401, "end_ix": 1411, "citation_format_type": "tether_og", "metadata": {"type": "file", "name": "Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf", "id": "file-0RaHilgOq3Lx0iw0SyQ60MGV", "source": "my_files", "text": "\nRev. Leon Sullivan\u2019s Progress Plaza, in\nPhiladelphia, Pennsylvania, was the \ufffdrst\nshopping center in the United States\nowned and run by African Americans.\n(Photo courtesy of Ford Foundation)\n\nImpact Investing\n\nCapital for Justice: Spurring On Impact\nInvesting for Racial Equity\nHow one foundation is building on a 50-year history of impact investing to unlock more capital and more\njustice toward greater equity, progress, and prosperity. \u00a0\n\nBy Roy Swan & Darren Walker Apr. 29, 2019\n\nThroughout this article series, it has been fascinating and\nencouraging to read the authors\u2019 re\ufffdlections on the\nimportance of putting racial equity at the center of the\nimpact investing movement\u2014and the most e\ufffdective ways\nof doing so at this pivotal moment. In preparing our\ncontribution, we have been thinking about how the Ford\nFoundation\u2019s use of impact investing tools, and our work\non racial equity, have evolved over the past half-century,\nand how that history informs our path today.\n\nAt the height of the United States Civil Rights Movement\nin the 1960s, the Ford Foundation was looking for new ways to invest its resources in marginalized\ncommunities. Already, it had used grants to support individual leaders and institutions\u2014funding\nresearch and building \ufffdelds like public interest law\u2014but it was no secret that it would need to do more\nto address the tangled root causes of racial inequality. In fact, the national director of the Congress of\nRacial Equality, Floyd McKissick, challenged Ford Foundation Vice President Mac Lowry to consider\nfunding disparity. One could, as he put it, \u201cget very irritated with foundations, which give \$25,000 to a\nman to write a book about the problems of the people who are trying to organize these communities,\nbut then refuse to give a nickel to those people who are actually \ufffdighting the problems.\u201d\n\nhttps://ssir.org/articles/category/impact_investing\nhttps://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\nhttps://ssir\nThe file is too long and its contents have been truncated.\n", "extra": {"cited_message_idx": 7, "search_result_idx": null, "evidence_text": "source", "cloud_doc_url": null}}}, {"start_ix": 1707, "end_ix": 1717, "citation_format_type": "tether_og", "metadata": {"type": "file", "name": "Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf", "id": "file-0RaHilgOq3Lx0iw0SyQ60MGV", "source": "my_files", "text": "\nRev. Leon Sullivan\u2019s Progress Plaza, in\nPhiladelphia, Pennsylvania, was the \ufffdrst\nshopping center in the United States\nowned and run by African Americans.\n(Photo courtesy of Ford Foundation)\n\nImpact Investing\n\nCapital for Justice: Spurring On Impact\nInvesting for Racial Equity\nHow one foundation is building on a 50-year history of impact investing to unlock more capital and more\njustice toward greater equity, progress, and prosperity. \u00a0\n\nBy Roy Swan & Darren Walker Apr. 29, 2019\n\nThroughout this article series, it has been fascinating and\nencouraging to read the authors\u2019 re\ufffdlections on the\nimportance of putting racial equity at the center of the\nimpact investing

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refuse to give a nickel to those people who are actually \ufffdgthtng the problems.\u201d\n\https://ssir.org/articles/category/impact_investing\n\https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\n\https://ssir\nThe file is too long and its contents have been truncated.\n", "cloud_doc_url": null}, {"matched_text": "\u30107\u2020source\u3011", "start_idx": 1401, "end_idx": 1411, "alt": null, "type": "file", "name": "Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf", "id": "file-0RaHilg0q3Lx0iw0SyQ60MGV", "source": "my_files", "snippet": "\nRev. Leon Sullivan\u2019s Progress Plaza, in\nPhiladelphia, Pennsylvania, was the \ufffdrst\nshopping center in the United States\nowned and run by African Americans.\n(Photo courtesy of Ford Foundation)\n\nImpact Investing\n\nCapital for Justice: Spurring On Impact\nInvesting for Racial Equity\nHow one foundation is building on a 50-year history of impact investing to unlock more capital and more\njustice toward greater equity, progress, and prosperity. \u00a0\n\nBy Roy Swan & Darren Walker Apr. 29, 2019\n\nThroughout this article series, it has been fascinating and\nencouraging to read the authors\u2019 re\ufffdctions on the\nimportance of putting racial equity at the center of the\nimpact investing movement\u2014and the most e\ufffdctive ways\nof doing so at this pivotal moment. In preparing our\ncontribution, we have been thinking about how the Ford\nFoundation\u2019s use of impact investing tools, and our work\non racial equity, have evolved over the past half-century,\nand how that history informs our path today.\n\nAt the height of the United States Civil Rights Movement\nin the 1960s, the Ford Foundation was looking for new ways to invest its resources in marginalized\ncommunities. Already, it had used grants to support individual leaders and institutions\u2014funding\nresearch and building \ufffdelds like public interest law\nbut it was no secret that it would need to do more\nto address the tangled root causes of racial inequality. In fact, the national director of the Congress of\nRacial Equality, Floyd McKissick, challenged Ford Foundation Vice President Mac Lowry to consider\nfunding disparity. One could, as he put it, \u201cget very irritated with foundations, which give \$25,000 to a\nman to write a book about the problems of the people who are trying to organize these communities,\nbut then refuse to give a nickel to those people who are actually \ufffdgthtng the problems.\u201d\n\https://ssir.org/articles/category/impact_investing\n\https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif\n\https://ssir\nThe file is too long and its contents have been truncated.\n", "cloud_doc_url": null}, {"matched_text": "\u30107\u2020source\u3011", "start_idx": 1707, "end_idx": 1717, "alt": null, "type": "file", "name": "Capital for Justice_ Spurring On Impact Investing for Racial Equity.pdf", "id": "file-0RaHilg0q3Lx0iw0SyQ60MGV", "source": "my_files", "snippet": "\nRev. Leon Sullivan\u2019s Progress Plaza, in\nPhiladelphia, Pennsylvania, was the \ufffdrst\nshopping center in the United States\nowned and run by African Americans.\n(Photo courtesy of Ford Foundation)\n\nImpact Investing\n\nCapital for Justice: Spurring On Impact\nInvesting for Racial Equity\nHow one foundation is building on a 50-year history of impact investing to unlock more capital and more\njustice toward greater equity, progress, and prosperity. \u00a0\n\nBy Roy Swan & Darren Walker Apr. 29, 2019\n\nThroughout this article series, it has been fascinating and\nencouraging to read the authors\u2019 re\ufffdctions on the\nimportance of putting racial equity at the center of the\nimpact investing movement\u2014and the most e\ufffdctive ways\nof doing so at this pivotal moment. In preparing our\ncontribution, we have been thinking about how the Ford\nFoundation\u2019s use of impact investing tools, and our work\non racial

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Financial Returns

- Market-Rate Returns:** Some impact investments aim to achieve market-rate financial returns comparable to traditional investments. These are suitable for investors who want to align their portfolios with their values without sacrificing financial performance.
- Below-Market Returns:** Other impact investments might accept below-market returns in exchange for greater social or environmental impact. This approach is common in areas where the primary objective is social good, and the financial return is secondary.

Social and Environmental Returns

- Quantitative Metrics:** These are specific, measurable outcomes that the investment aims to achieve. Examples include:
 - Reduction in Homelessness:** An investment might aim to reduce homelessness in a city by providing affordable housing solutions.
 - Access to Clean Water:** Ensuring that a certain number of communities gain access to clean drinking water.
 - Job Creation:** Creating a specific number of jobs in underserved areas.
 - Educational Attainment:** Increasing graduation rates in schools serving low-income populations.
- Qualitative Metrics:** These outcomes might be more subjective but are equally

important. Examples include:\n - **Community Empowerment**: Empowering local communities through participatory development projects.\n - **Health Improvements**: Enhancing the overall health and well-being of a community through healthcare initiatives.\n - **Environmental Conservation**: Protecting and preserving natural habitats and biodiversity.\n\n### Examples of Impact Investing with Social Returns\n\n1. **Affordable Housing Projects**: \n - **Financial Return**: Rental income and potential appreciation of property value.\n - **Social Return**: Reduction in homelessness and improved living conditions for low-income families.\n\n2. **Renewable Energy Investments**: \n - **Financial Return**: Profits from the sale of electricity generated by solar or wind farms.\n - **Environmental Return**: Reduction in greenhouse gas emissions and dependence on fossil fuels.\n\n3. **Microfinance Institutions**: \n - **Financial Return**: Interest and repayment on microloans.\n - **Social Return**: Economic empowerment of small entrepreneurs and reduction of poverty in developing regions.\n\n4. **Education Technology Ventures**: \n - **Financial Return**: Revenue from sales of educational software and services.\n - **Social Return**: Enhanced educational outcomes and greater access to quality education for underserved students.\n\n### Measuring Social and Environmental Impact\n\nTo ensure that impact investments achieve their intended social or environmental returns, investors often use frameworks and tools such as:\n\n- **Impact Reporting and Investment Standards (IRIS)**: A system for measuring, managing, and optimizing impact.\n- **Global Impact Investing Rating System (GIIRS)**: Provides comparable ratings for impact investing funds and companies.\n- **Social Return on Investment (SROI)**: A method for measuring extra-financial value (such as social and environmental value) relative to resources invested.\n\n### Conclusion\n\nIn impact investing, returns are not solely fiduciary; they encompass both financial performance and measurable social or environmental outcomes. The balance between these types of returns depends on the goals of the investor and the specific nature of the investment. This dual focus makes impact investing a unique and powerful approach for addressing global challenges while also generating financial returns."}], "status": "finished_successfully", "end_turn": true, "weight": 1.0, "metadata": {"citations": [], "gizmo_id": null, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "auto", "pad": "AAAAAAAAAAAAAAAAAAAA", "parent_id": "aaa261cb-2060-48ef-bb4a-679eab48ded4", "finish_details": {"type": "stop", "stop_tokens": [200002]}, "is_complete": true, "request_id": "89655074cda10d55-MXP", "timestamp": "absolute", "recipient": "all", "channel": null, "parent": "aaa261cb-2060-48ef-bb4a-679eab48ded4", "children": []}, "moderation_results": [], "current_node": "5cca2f41-6c7b-4685-9fc7-283070b64532", "plugin_ids": null, "conversation_id": "c26d8a01-b003-4d00-b53a-f88c94817424", "conversation_template_id": null, "gizmo_id": null, "is_archived": false, "safe_urls": ["https://twitter.com/darrenwalker", "https://ssir.org/bios/darren_walker", "https://ssir.org/bios/lisa_ranghelli", "https://ssir.org/articles/entry/aligning_purpose_and_investments_why_are_you_stuck", "https://www.ncrp.org/2018/09/philanthropy-experts-swap-tips-on-sharing-power.html?utm_source=SSIR", "https://ssir.org/articles/category/foundations", "https://www.twitter.com/ncrp", "https://ssir.org/images/blog/Ford_Progress-Plaza-592x333.gif", "https://www.illumencapital.com/", "https://ssir.org/images/blog/Ford-Foundation-592x333.gif", "https://shop.mayvenn.com/about-us", "https://www.ncrp.org/2018/06/why-examining-power-and-privilege-is-critical-to-shifting-culture-in-philanthropy.html?utm_source=SSIR", "http://www.hopstudios.com/",

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L\u0027acqua del tuo stagno era cristallina e rifletteva le stelle che brillavano
sopra di te ogni notte. Il tuo nome era Floppy, e avevi il potere di parlare con gli
altri animali e di usare la magia per aiutare chi aveva bisogno.\n\nUn giorno, mentre
riposavi su una foglia di ninfea, una farfalla dorata si pos\u00f2 accanto a te.
"Floppy," disse, "la Regina delle Rane ha bisogno del tuo aiuto. Un
grande pericolo minaccia il nostro regno. Una strega malvagia ha rubato la Gemma del
Cuore, la fonte della nostra magia."\n\nSenza esitazione, sapevi che dovevi
aiutare la tua regina e il tuo regno. Preparasti il tuo zainetto con alcuni oggetti
magici e parti per la tua avventura. Lungo il cammino, incontrasti vari amici, come
una libellula saggia e un vecchio gufo, che ti diedero consigli e aiuto.\n\nArrivasti
infine davanti a un oscuro bosco, il luogo dove la strega viveva. La nebbia avvolgeva
gli alberi e il silenzio era inquietante.\n\nCosa fai adesso?\n\n(Se hai ChatGPT Plus,
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passione intensa e travolgente. Un giorno, mentre esplori i confini del tuo regno,
incontri una creatura misteriosa, un principe ranocchio di un regno lontano. I suoi
occhi sono profondi e scuri come la notte, e c'è qualcosa di magnetico nel
suo sguardo.\n\nIl suo nome \u00e8 Noir. Ha un'aura di mistero e una forza
interiore che ti affascina. Noir non \u00e8 una creatura vicina a Dio, ma ha una
vitalit\u00e0 e una passione che non puoi ignorare. Vi trovate spesso a parlare sotto
la luna piena, le sue parole sono come incantesimi che ti avvolgono e ti fanno sentire
viva.\n\nIl legame tra te e Noir cresce sempre di pi\u00f9. La sua forza e il suo
amore ti completano in modo che non avresti mai immaginato. Insieme, formate una
coppia potente e inarrestabile, pronta a guidare il regno verso un futuro ancora
pi\u00f9 brillante.\n\nCome decidi di portare avanti la tua vita con Noir al tuo
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stessa che hai sconfitto, lo trasform\u00f2 in un ranocchio come punizione per aver
rifiutato il suo amore. \n\n"Vagavo senza meta," dice Noir, "finch\u00e9
non ho sentito parlare del regno delle rane e della sua nuova regina, una rana con
poteri magici straordinari. Ho capito che dovevo trovarti, sentivo che eri la chiave
per spezzare la mia maledizione." \n\nNoir ti guarda negli occhi. "Ma ora che
ti ho trovato, il mio desiderio di tornare umano \u00e8 scomparso. Preferisco restare
al tuo fianco come sono, perch\u00e9 il nostro amore \u00e8 pi\u00f9 forte di
qualsiasi magia." \n\nDecidete insieme di cercare un modo per spezzare la
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real, in other words great acting. oh and a happy ending! can you compile a list of C-dramas known by you that fit this profile and are available subtitled in english? (fan subbed is okay) bonus points if the female lead knows how to scheme too! :D"]}, {"request_id": "893798e769614be1-MXP", "message_source": null, "timestamp": "absolute", "message_type": null}, {"recipient": "all", "channel": null}, {"parent": "d90d3565-2536-4643-b733-4e0e03bc03cc", "children": [{"id": "e5ba91e2-543c-40ae-b108-c644ddb4ab3a"}], {"id": "e5ba91e2-543c-40ae-b108-c644ddb4ab3a", "message": {"id": "e5ba91e2-543c-40ae-b108-c644ddb4ab3a", "author": {"role": "assistant", "name": null, "metadata": {}}, "create_time": 1718339581.486236, "update_time": null, "content": {"content_type": "text", "parts": ["Sure, I can suggest several Chinese dramas that fit your criteria, focusing on artful cinematography, strong female leads, good subtitles, organic comedic relief, great acting, and happy endings. Here are some C-dramas you might enjoy:\n\n1. **“The Story of Yanxi Palace”** (2018) - **Plot**: Set during the Qing Dynasty, the story follows Wei Yingluo, a smart and resourceful maid who enters the Forbidden City to uncover the truth behind her sister’s death. Her intelligence and ability to scheme help her navigate palace politics and earn the Emperor’s favor. - **Why You’ll Like It**: The cinematography is beautiful, the female lead is strong and cunning, and it has excellent production values and acting. - **Availability**: Subtitled in English on various streaming platforms. \n\n2. **“Nirvana in Fire”** (2015) - **Plot**: Set during the Southern Liang Dynasty, the series follows Lin Shu, who returns under the alias Mei Changsu to seek revenge and clear his family’s name. He uses his wit and strategic mind to navigate the political landscape. - **Why You’ll Like It**: Exceptional cinematography, compelling plot, and strong character development. Although not female-centric, it features powerful female characters. - **Availability**: Subtitled in English on platforms like Viki. \n\n3. **“The Legend of Zhen Huan”** (2011) - **Plot**: A historical drama that follows the rise of Zhen Huan, a young woman who enters the palace as a concubine and uses her intelligence to survive and gain power in the treacherous environment. - **Why You’ll Like It**: Intricate plotting, a strong and scheming female lead, and well-developed characters. - **Availability**: Subtitled in English on various streaming sites. \n\n4. **“The King’s Woman”** (2017) - **Plot**: The story follows Gongsun Li, who becomes the concubine of the King of Qin, Ying Zheng. Despite initial reluctance, she learns to navigate the palace intrigue and protect her loved ones. - **Why You’ll Like It**: Strong female lead, beautiful cinematography, and well-executed romantic and dramatic elements. - **Availability**: Subtitled in English on streaming platforms like Viki. \n\n5. **“The Rise of Phoenixes”** (2018) - **Plot**: Ning Yi, a prince with a hidden agenda, and Feng Zhiwei, a woman with a mysterious past, navigate the power struggles within the kingdom. Zhiwei disguises herself as a man to seek justice and climbs the ranks in the political arena. - **Why You’ll Like It**: Gorgeous visuals, strong acting, complex characters, and a plot filled with scheming and intrigue. - **Availability**: Subtitled in English on Netflix and other platforms. \n\n6. **“Ruyi’s Royal Love in the Palace”** (2018) - **Plot**: A sequel to **“The Legend of Zhen Huan,”** it follows the love story of Ruyi and the Qianlong Emperor, showcasing the trials and tribulations within the royal court. - **Why You’ll Like It**: Rich in historical detail, intricate plots, and a strong female lead who knows how to

maneuver through palace intrigue.\n - ****Availability****: Subtitled in English on streaming platforms like Viki.\n\n7. ****"Arsenal Military Academy"** (2019)****\n - **Plot****: Set in the Republican era, it follows Xie Xiang, who disguises herself as a man to join a military academy. She navigates military training, friendships, and romantic entanglements while keeping her true identity a secret.\n - ****Why You\u2019ll Like It****: Strong, resourceful female lead, good balance of drama and comedy, and an engaging plot.\n - ****Availability****: Subtitled in English on Viki.\n\nThese dramas should offer a mix of strong female leads, intriguing plots, and excellent production values similar to what you enjoyed in "The Story of Ming Lan.""}], "status": "finished_successfully", "end_turn": true, "weight": 1.0, "metadata": {"citations": [], "gizmo_id": null, "message_type": null, "model_slug": "gpt-4o", "default_model_slug": "gpt-4o", "pad": "AAAAAAAAAAAAAAAAAAAA", "parent_id": "aaa24b95-2267-4846-bf4d-b1f14ade7aa3", "finish_details": {"type": "stop", "stop_tokens": [200002]}, "is_complete": true, "request_id": "893798e769614be1-MXP", "timestamp_": "absolute", "recipient": "all", "channel": null}, "parent": "aaa24b95-2267-4846-bf4d-b1f14ade7aa3", "children": [{"id": "aaa27373-fab3-46bf-8442-897bb23816a2"}], "aaa27373-fab3-46bf-8442-897bb23816a2": {"id": "aaa27373-fab3-46bf-8442-897bb23816a2", "message": {"id": "aaa27373-fab3-46bf-8442-897bb23816a2", "author": {"role": "user", "name": null, "metadata": {}}, "create_time": 1718339671.336899, "update_time": null, "content": {"content_type": "text", "parts": ["uhhh I've either seen or ruled out all of those, what else ya got? "]}}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"request_id": "89379bc05f584be1-MXP", "message_source": null, "timestamp_": "absolute", "message_type": null}, "recipient": "all", "channel": null}, "parent": "e5ba91e2-543c-40ae-b108-c644ddb4ab3a", "children": [{"id": "3fc2c305-25f2-4d71-a7b1-c15a9edf1bd6"}], "3fc2c305-25f2-4d71-a7b1-c15a9edf1bd6": {"id": "3fc2c305-25f2-4d71-a7b1-c15a9edf1bd6", "message": {"id": "3fc2c305-25f2-4d71-a7b1-c15a9edf1bd6", "author": {"role": "system", "name": null, "metadata": {}}, "create_time": 1718339702.00316, "update_time": null, "content": {"content_type": "text", "parts": [""]}}, "status": "finished_successfully", "end_turn": true, "weight": 0.0, "metadata": {"rebase_system_message": true, "message_type": null, "model_slug": "gpt-4", "default_model_slug": "gpt-4", "parent_id": "aaa27373-fab3-46bf-8442-897bb23816a2", "request_id": "89379bc05f584be1-MXP", "timestamp_": "absolute", "is_visually_hidden_from_conversation": true}, "recipient": "all", "channel": null}, "parent": "aaa27373-fab3-46bf-8442-897bb23816a2", "children": [{"id": "1e6aadf0-a130-4287-bb8c-7d5ff750c9d3"}], "1e6aadf0-a130-4287-bb8c-7d5ff750c9d3": {"id": "1e6aadf0-a130-4287-bb8c-7d5ff750c9d3", "message": {"id": "1e6aadf0-a130-4287-bb8c-7d5ff750c9d3", "author": {"role": "assistant", "name": null, "metadata": {}}, "create_time": 1718339702.003218, "update_time": null, "content": {"content_type": "text", "parts": ["Certainly! Let\u2019s explore some more Chinese dramas that may have flown under your radar but could still capture your interest with their compelling storylines, strong female leads, and quality production:\n\n1. ****"Winter Begonia"** (2020)****\n - **Plot****: Set in the early 20th century, this drama centers around the world of Peking opera and the friendship between a wealthy businessman and a talented opera singer. The series, while not female-centric, features strong female characters who play pivotal roles in a predominantly male environment.\n - ****Why You\u2019ll Like It****: Rich in cultural history, beautiful costumes, and a deep exploration of friendship and art. \n - ****Availability****: Subtitled in English on platforms like iQIYI and Viki.\n\n2. ****"Ming Dynasty"**

(2019)**\n - **Plot**:

This series follows the life of Sun Ruowei, a woman who survives the tumultuous changes from the late Yuan Dynasty to the Ming Dynasty and becomes an empress. It showcases her resilience and strategic mind throughout political upheaval.\n - **Why You\u2019ll Like It**:

Strong female protagonist, rich historical detail, and impressive production.\n - **Availability**:

Subtitled in English on platforms like Viki.\n\n3. **"The Romance of Tiger and Rose"

(2020)**\n - **Plot**:

A screenwriter finds herself trapped inside her own script, living as the third princess in a story where the city is matriarchal, and she must navigate its unique challenges to survive.\n - **Why You\u2019ll Like It**:

It's light-hearted with a comedic twist but also features a clever plot and a strong, scheming female lead.\n - **Availability**:

Subtitled in English on Viki.\n\n4. **"Joy of Life"

(2019)**\n - **Plot**:

In this historical fantasy, a modern man finds himself born into an ancient empire's royal family. He uses his advanced knowledge and wit to navigate the dangers of the palace.\n - **Why You\u2019ll Like It**:

While focusing on a male lead, the drama includes strong female characters who are integral to the plot, blending humor, romance, and political intrigue seamlessly.\n - **Replayability**:

Great for rewatching due to its complex plot.\n - **Availability**:

Subtitled in English on platforms like Viki.\n\n5. **"Bloody Romance"

(2018)**\n - **Plot**:

In a brutal and mysterious world called Gui Hua City, a young woman who escapes death finds herself in a city of female assassins and must rise through the ranks to survive.\n - **Why You\u2019ll Like It**:

Darker themes, intense, with a focus on a female lead who grows significantly, both personally and physically, throughout the series.\n - **Availability**:

Subtitled in English on various streaming platforms.\n\n6. **"Miss Truth"

(2020)**\n - **Plot**:

The series follows a talented forensic examiner in the Tang Dynasty who solves mysteries while dealing with the challenges of her profession and finding love.\n - **Why You\u2019ll Like It**:

Combines elements of mystery with historical drama and features a smart and independent female lead.\n - **Availability**:

Subtitled in English on platforms like Viki and YouTube.\n\nThese selections offer a blend of historical settings, intricate plotting, and strong female characters, each bringing something unique to the genre."}], "status": "finished_successfully", "end_turn": true, "weight": 1.0, "metadata": {"citations": [], "gizmo_id": null, "finish_details": {"type": "stop", "stop_tokens": [100260]}, "is_complete": true, "message_type": null, "model_slug": "gpt-4", "default_model_slug": "gpt-4", "pad": "AAAAAAAAAA", "parent_id": "3fc2c305-25f2-4d71-a7b1-c15a9edf1bd6", "request_id": "89379bc05f584be1-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, "parent": "3fc2c305-25f2-4d71-a7b1-c15a9edf1bd6", "children": ["aaa26dc9-08c8-4e23-b7c1-6adefe4660fd"]}, {"id": "aaa26dc9-08c8-4e23-b7c1-6adefe4660fd", "message": {"id": "aaa26dc9-08c8-4e23-b7c1-6adefe4660fd", "author": {"role": "user", "name": null, "metadata": {}}, "create_time": 1718339793.572313, "update_time": null, "content": {"content_type": "text", "parts": ["I don't actually like comedy that's why the subtle comedic moments in Ming lan were so captivating because even I was led to laughter at the appointed times. NOW that you know this about me can you update your selections? "]}}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"request_id": "89379ebc58aa83ac-MXP", "message_source": null, "timestamp_": "absolute", "message_type": null}, "recipient": "all", "channel": null}, {"parent": "1e6aadf0-a130-4287-bb8c-7d5ff750c9d3", "children": ["44e68c72-82eb-4d97-9a48-be0716f61259"]}, {"id": "44e68c72-82eb-4d97-9a48-be0716f61259": {"id": "44e68c72-

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["Certainly! Given your preference for dramas with more subtle and organic comedic
elements, here's a revised list of Chinese dramas focusing on strong narratives,
compelling female leads, and minimal overt comedy:\n\n1. **\"The Longest Day in
Chang'an\"; (2019)**\n - **Plot**: Set during the Tang Dynasty, this series
revolves around a former official who must work with a prisoner to prevent a terrorist
attack on the capital within 24 hours. While it is primarily a historical thriller, it
has moments where the tension is lightened subtly.\n - **Why You'll Like It**:
High-stakes drama with meticulous period detail and cinematography, plus the plot is
dense with intrigue.\n - **Availability**: Subtitled in English on Amazon Prime
Video and other streaming platforms.\n\n2. **\"The Imperial Doctress\";
(2016)**\n - **Plot**: Based on the life of Tan Yunxian, one of the first female
doctors of the Ming Dynasty, this drama follows her struggles and triumphs in a male-
dominated medical field.\n - **Why You'll Like It**: Focuses on a strong and
intelligent female lead overcoming societal hurdles, with romance and family drama
intertwined.\n - **Availability**: Subtitled in English on Viki.\n\n3.
**\"Goodbye My Princess\"; (2019)**\n - **Plot**: A heartbreaking love story
between the Princess of Western Liang and the Crown Prince of the Eastern Li Dynasty,
which starts with an arranged marriage and evolves amidst numerous political and
personal trials.\n - **Why You'll Like It**: It's rich in emotional depth
and tragic elements, with minimal comedic relief and a focus on the complexities of
love and power.\n - **Availability**: Subtitled in English on Viki.\n\n4.
**\"Princess Agents\"; (2017)**\n - **Plot**: Set during the Warring States
period, this drama follows Chu Qiao, a slave girl who rises to become a powerful
military leader in a story filled with revenge, betrayal, and epic warfare.\n -
**Why You'll Like The Longest Day in Chang'an It**: Features a strong female
protagonist who overcomes great odds, and the drama beautifully integrates elements of
action, romance, and historical intrigue.\n - **Availability**: Subtitled in English
on various platforms including YouTube.\n\n5. **\"Nirvana in Fire 2\"; (2017-
2018)**\n - **Plot**: A sequel to the acclaimed \"Nirvana in Fire,\" this installment
follows a young noble as he returns home to defend his
family and the empire against internal threats and corruption.\n - **Why You'll
Like It**: While it continues the original's theme of loyalty and political
intrigue, it focuses on new characters and their complex relationships, with
occasional light moments to ease the tension.\n - **Availability**: Subtitled in
English on Viki.\n\nThese dramas maintain a more serious tone with plots that are
engaging and filled with drama, romance, and political intrigue, aligning better with
your tastes for subtle humor and strong storytelling." ]}, "status":
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(EACH ARTICLE/ TRANSCRIPT IS ATTACHED IN REFERENCE LIST ORDER) while presenting the
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Ph.D., CFP Forbes Councils Member

Forbes Finance Council COUNCIL POST | Membership (Fee-Based)

Nov 22, 2019, 8:00am EST

When we think of relationships, we often think of our interactions with other people. Our life experiences teach us that relationships with people can be healthy or toxic based on a number of factors. However, how many of us consider whether our relationship with money can be the same?

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In a 2018 survey, a little over half of respondents said they strongly believed their spouse or partner was honest with them about money. Arguing about money early in a relationship has been found to be the No. 1 predictor of whether a couple gets divorced. So why is having a good relationship with money important?

Financial wellness is an important part of our overall well-being. Financial wellness includes having a healthy relationship with money that makes us feel satisfied and not overly stressed out. A 2015 report showed that money is the leading cause of stress for adults. So how is our relationship with money formed? It's formed by our observations and the messaging we see and hear related to money. According to a PBS report, children can understand basic concepts about money as early as age 3, and by 7, their values around money are already set. Our early experiences with money, such as witnessing arguments about it or being defined by it, can trigger a range of emotions such as anxiety, resentment or feelings of elitism that we carry through life. Those experiences and emotions shape our values and relationship with money. Based on our values, money can make us feel secure as we provide for ourselves and others we care for. Our joy may come from the sacrifices we make with money. Money can also make us feel insecure if we do not have the things we want. We can view it negatively, as it may encourage envy and corruption. It can also position us to be overly socially competitive by attempting to keep up with the Joneses. We can be led to believe money is the source of increased happiness. However, a 2018 study by researchers at Purdue University showed that individuals with an annual income of \$95,000 reported the greatest level of overall life satisfaction.

<https://www.thestreet.com/story/14475875/1/is-your-spouse-cheating-on-you-with-money.html>

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<http://money.com/money/5157625/ideal-income-study/>

study also found that additional income did not create a proportionate level of happiness beyond this point. Many baby boomers are contemplating life transitions, such as retirement, succession planning and wealth transfer. As they consider transferring their wealth, they are questioning their beneficiaries' relationships with money and what will become of their nest egg. Take, for instance, the story of a family I know. Nathan and his wife, Ann, have been married 30 years. Over the years, they have debated when they should tell their daughter, Morgan, about their wealth. The couple was concerned that learning about their wealth could limit Morgan's ambition. Now that Morgan has established her career, Nathan and Ann are more comfortable discussing

their state. However, they cannot assume their daughter's values related to money are the same as theirs. Nathan is from a family that experienced financial hardship his daughter wasn't fully aware of growing up. However, Ann grew up middle class and had less fear of losing assets or being financially insecure. After much agony, the couple had the talk with their daughter. Nathan said the discussion went well and allowed him and his wife to share their experiences related to money growing up. Morgan left the meeting understanding why her parents took various approaches to spending and building wealth, as well as how their legacy should continue. The conversation also inspired her husband to have a conversation with his parents. If you haven't done so, take time to think about your relationship with money and how it was formed. Also, confirm that your children have a positive relationship with it. Key questions you should ask yourself include:

- Where do my money values come from?
- Does money make me feel confident or insecure?
- Do I have a history of making good financial decisions, and if not, why?
- Am I hesitant to take action when there are issues regarding money?
- Am I impulsive with money, or do I have the discipline to say no?
- Do my children have good values with money, especially if they will inherit it from me?

If thinking about these questions makes you feel uncomfortable, you might not have a good relationship with money. If you do not have a healthy relationship with it, consider consulting with a financial advisor to develop a strategy to correct the financial path for you and your family. Financial health contributes to overall health and a better quality of life. The information provided here is not investment, tax or financial advice. You should consult with a licensed professional for advice concerning your specific situation. Forbes Finance Council is an invitation-only organization for executives in successful accounting, financial planning and wealth management firms. Do I qualify?

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BEhLQEzCam4AbEFX8rH5ONR1", "domain": "tactiq-free-transcript-SUvoBzjZv7E.txt", "text":
"# tactiq.io free youtube transcript\n# How to be a better fundraiser | Kara Logan
Berlin | TEDxSantaClaraUniversity\n#\nhttps://www.youtube.com/watch/SUvoBzjZv7E\n\n00:00:00.410 [Music]\n00:00:15.260 I'm here today to talk about fundraising\n00:00:18.050 or as you probably think of it the other\n00:00:20.550 F word because if you want to change the\n00:00:24.210 world you have to know how to pay for it\n00:00:25.710 I'm not talking about being a good\n00:00:27.570 person you can do that for free I'm\n00:00:29.599 talking about if you want to create\n00:00:31.619 something start something galvanize a\n00:00:34.649 community\n00:00:35.520 improve the lives of others run for\n00:00:37.050 office every day great ideas die on the\n00:00:40.440 vine because they don't have capital to\n00:00:41.910 get off the ground and all of the work\n00:00:44.100 the thought the vision that goes into\n00:00:46.350 the idea isn't worth much if you can't\n00:00:48.450 pay your bills and while most of the\n00:00:50.760 greatest social movements in history\n00:00:52.170 were powered purely by an idea and\n00:00:55.050 people's belief in that idea real change\n00:00:57.930 in impact require resources real people\n00:01:02.520 do this work they need real change real\n00:01:05.880 impact and resources to actually make it\n00:01:08.670 happen the people that believe in this\n00:01:10.830 work have to have the support and the\n00:01:12.840 resources to do it that's where I come\n00:01:15.930 in I get essential resources into the\n00:01:18.150 hands of people and visionaries on the\n00:01:20.430 front lines doing work that matters we\n00:01:23.400 spend the majority of our waking hours\n00:01:24.990 working we spend more time working than\n00:01:27.210 we do with our loved ones so I decided\n00:01:29.490 early on that I have to love my work and\n00:01:31.259 it has to add value and while I would\n00:01:34.530 love to be one of these people who\n00:01:36.240 spearheads you know social change from\n00:01:39.000 the ground up and the thing I realized\n00:01:41.220 early on in my nonprofit career is that\n00:01:43.619 the thing I'm good at the thing I'm\n00:01:45.570 really good at is raising money and I\n00:01:49.140 love it I think it is a privilege to\n00:01:51.570 work alongside bold ambitious optimistic\n00:01:55.049 leaders and the organizations they serve\n00:01:56.869 so I teach people how to do the thing\n00:01:59.369 I'm good at because the more people that\n00:02:01.469 learn how to be good at my end of this\n00:02:03.240 work the more work will get done and I\n00:02:06.119 teach everyone I teach CEOs and\n00:02:09.209 presidents and boards of directors and\n00:02:12.020 Didi's I teach development directors and\n00:02:15.110 all sorts of teams and nonprofit newbies\n00:02:17.740 social change agents and candidates I\n00:02:20.510 teach anyone that wants to do something\n00:02:22.640 extraordinary how to fund their dream my\n00:02:25.490 dream is that there will be more people\n00:02:26.750 like me doing this work well and that\n00:02:29.330 development will be an undergraduate\n00:02:30.650 course at universities so that\n00:02:32.330 fundraising animals like me will find\n00:02:35.510 this job out of the gate instead of\n00:02:37.070 discovering it years later accidentally\n00:02:38.960 I even have the curriculum developed but\n00:02:41.210 short of overhauling undergraduate\n00:02:43.010 course requirements I think tonight's\n00:02:45.530 probably a good first step to get people\n00:02:47.510 to think about fundraising more as an\n00:02:50.690 opportunity and less as a dirty word if\n00:02:54.260 you want to change the world you have to\n00:02:56.240 know how to pay for it to do that well\n00:02:58.580 you have to understand three big

things\n00:03:00.140 your feelings about wealth and money the\n00:03:03.860 importance of building relationships and\n00:03:05.870 how to ask for what you want let's start\n00:03:09.350 at the top your feelings about wealth\n00:03:10.820 and money what is your relationship to\n00:03:13.160 money money is complicated it makes\n00:03:16.640 everyone squeamish it makes everyone act\n00:03:18.650 kind of weird anyone who's ever had to\n00:03:20.930 split the check after dinner with\n00:03:22.400 friends can tell you this and imagine\n00:03:24.320 what it was like you know before venmo\n00:03:27.910 to help people learn how to raise money\n00:03:30.530 you have to help them understand their\n00:03:32.060 deal with money because everybody has\n00:03:33.590 baggage grow up poor baggage grow up\n00:03:36.920 rich baggage mad or envious that other\n00:03:40.160 people have more money than you baggage\n00:03:42.290 I think people with money are smarter\n00:03:44.810 than you\n00:03:45.970 baggage feel guilty that you have more\n00:03:49.970 money than other people that's some\n00:03:52.220 first-class baggage\n00:03:55.349 still baggage people it's still baggage\n00:03:57.629 so whatever your deal is with your\n00:04:00.659 baggage you have to reconcile it if\n00:04:02.129 you're gonna be able to ask for money\n00:04:03.209 and here's a little tip about asking\n00:04:05.280 people for money\n00:04:05.999 the only difference about really wealthy\n00:04:08.340 people in us is that they have more\n00:04:10.379 money than us that's it\n00:04:12.750 don't overcomplicate it they come with\n00:04:15.569 their own baggage when you think about\n00:04:19.168 how to do this work it's important to\n00:04:21.839 remember that money makes the world go\n00:04:24.000 around you hear that all the time but\n00:04:25.320 it's true whether you're a non-profit\n00:04:26.490 for a profit or you pay your own bills\n00:04:28.729 we often feel like talking about it is\n00:04:31.380 this icky embarrassing ugly thing but\n00:04:34.139 it's just money and it's a fact of life\n00:04:36.810 so how you feel about it directly\n00:04:38.880 affects how you approach it like\n00:04:41.099 everyone else when I started out in this\n00:04:42.930 work I had to examine and understand my\n00:04:46.410 own feelings about wealth and money and\n00:04:48.210 I had to learn how to separate them from\n00:04:50.400 how I feel about raising money for\n00:04:52.110 important causes how I feel about asking\n00:04:54.900 for money to help people do good work in\n00:04:56.940 the world is not the same as how I feel\n00:04:58.949 about asking for money for myself this\n00:05:01.380 is an important distinction when I go\n00:05:04.139 and talk to someone I'm not asking them\n00:05:06.150 to pay my mortgage I'm giving them an\n00:05:08.909 opportunity to invest an idea that's\n00:05:11.460 gonna change the world for the better\n00:05:12.990 why should I feel bad about that the\n00:05:16.320 answer is that I shouldn't I wouldn't\n00:05:18.030 feel bad about giving them the inside\n00:05:19.620 tip on a hot stock and I'm not gonna\n00:05:21.870 feel bad about giving them the inside\n00:05:23.520 tip on empowering social change either\n00:05:25.440 if you want to be good at raising money\n00:05:28.139 you have to be able to reframe the ask\n00:05:30.270 both for yourself and for other people\n00:05:32.310 as an opportunity next you have to get\n00:05:36.360 prepared to build some relationships\n00:05:38.120 people give to people they don't just\n00:05:40.349 give to ideas and if they don't believe\n00:05:42.960 in the person running the place you're\n00:05:44.190 already dead in the water this is true\n00:05:46.289 whether you're in stocks or venture\n00:05:48.780 capital politics or nonprofits building\n00:05:52.889 a relationship with people takes

work\n00:05:54.979 you have to care about more than just\n00:05:57.479 what you want or need you have to also\n00:05:59.490 value what someone else wants or need I\n00:06:01.590 know it's a shocking terrible idea but\n00:06:04.800 oftentimes closing gifts is\n00:06:07.010 understanding the person more\n00:06:08.820 it's important to know the product and\n00:06:10.380 if you think building a relationship\n00:06:11.910 with with people takes work building a\n00:06:14.610 relationship with someone you're asking\n00:06:16.200 for money from takes work and it takes\n00:06:19.710 homework have you done any research do\n00:06:23.160 you have any idea what they care about\n00:06:24.600 do you know why they should invest in\n00:06:26.850 your work can you answer that question\n00:06:29.040 in less than 30 seconds if you can't the\n00:06:31.140 meetings gonna be it's gonna be pretty\n00:06:32.790 rough and the answer can't be because\n00:06:34.650 they're super rich and they live in your\n00:06:36.030 zip code when you talk to people and\n00:06:40.860 understand what they care about it has\n00:06:43.170 to be in person fundraising is\n00:06:45.270 relational it's not transactional and\n00:06:47.400 you have to ask them questions when I\n00:06:50.850 sit down with the donor it goes\n00:06:52.140 something like this hi thanks so much\n00:06:55.560 for seeing me how have you been\n00:06:57.240 did you guys go anywhere fun over\n00:06:58.410 holiday nice I love Mexico do you always\n00:07:00.750 go to the same place oh that's awesome\n00:07:02.670 are those your kids they're so cute how\n00:07:04.950 old are they where are they in school oh\n00:07:07.140 that's a great school are you guys very\n00:07:08.820 involved there your spouse is on the\n00:07:10.680 board how's that I bet it's a ton of\n00:07:12.180 work how do you guys meet oh it's Santa\n00:07:14.250 Clara that's awesome are you super\n00:07:15.870 involved in the alumni network oh that's\n00:07:17.790 so interesting where do you guys live\n00:07:19.290 again oh that's great is that your boat\n00:07:22.990 I literally go through all of these\n00:07:26.590 things right and you know why because\n00:07:27.910 guess what I know now I know they're out\n00:07:30.009 a hundred and twenty grand a year in\n00:07:31.449 schooling for the next 12 years right\n00:07:33.550 spouse is on the board of the kids\n00:07:35.410 school I know they're out 100k probably\n00:07:37.449 that's that's a six-figure they're both\n00:07:39.520 involved in their school alumni and\n00:07:40.990 that's probably 25k they told me they\n00:07:43.270 live on the Upper East Side I could look\n00:07:44.830 up their apartment online and I can find\n00:07:46.660 out what their mortgages and I know they\n00:07:48.789 own a second home in Mexico oh and they\n00:07:51.069 own a boat which is like funny money\n00:07:53.800 right so what I now understand is true\n00:07:59.139 what I now understand is their thousand\n00:08:02.229 dollar gift is probably more of a\n00:08:04.000 starter gift and I should be thinking\n00:08:06.160 about ways to to help them partner with\n00:08:09.639 us and invest in a more meaningful way I\n00:08:12.030 know this sounds a tad mercenary I'm not\n00:08:15.940 confused about how it sounds but here's\n00:08:19.360 what I want to tell you because this is\n00:08:20.680 the part that all my clients always want\n00:08:22.509 to skip because they think it's the\n00:08:23.680 fluff and it's not important if you\n00:08:26.680 don't understand what they care about\n00:08:28.150 and what they value how are you ever\n00:08:30.550 gonna be able to tell them about your\n00:08:31.900 work right I want them to fund our work\n00:08:34.510 I do but I also want them to have a\n00:08:37.089 really meaningful experience as a donor\n00:08:39.130 so that they

feel like we're partners\n00:08:41.200 and not they're not an ATM right so
it's\n00:08:45.550 important to ask the questions because\n00:08:47.260 the more
you know about them and you\n00:08:48.940 know what they value the more you
can\n00:08:50.709 steer the conversation in a direction\n00:08:52.480 about your work
that will resonate for\n00:08:54.010 them and once you get past the get
to\n00:08:56.020 know you part you get into the fun stuff\n00:08:58.000 like why are
you philanthropic at all\n00:09:00.610 right why do you invest in new ideas
do\n00:09:05.380 you want giving back to be a value you\n00:09:07.180 pass on to your
children can we help you\n00:09:09.100 do that it's really awesome
it's\n00:09:12.040 meaningful and remember it's a\n00:09:13.149 conversation
it's not a\n00:09:14.709 cross-examination it's not an
interview\n00:09:17.520 don't walk in there and tell them\n00:09:19.810
everything you already know about them\n00:09:21.130 because you did your research you
don't\n00:09:22.240 get extra points for knowing how to use\n00:09:23.620 Google
it's 75% them talking 25% you\n00:09:29.170 listening it's better to be a
good\n00:09:30.910 listener than a good showman and once\n00:09:33.070 you understand
what they care about you\n00:09:35.740 can talk to them\n00:09:36.580 what you care
about right you can tell\n00:09:38.290 them about you now when you do
this\n00:09:40.450 don't get too deep into the weeds or\n00:09:42.820 you'll
lose them it's a lot like when I\n00:09:45.040 sit down with guys in finance
right and\n00:09:47.200 I say you know how's work I'm looking\n00:09:50.800
for like a thumbs-up thumbs-down but\n00:09:53.589 what I get sometimes is like a long
just\n00:10:00.360 description of how the markets are\n00:10:02.649 trending and my
brain leaves my body and\n00:10:05.620 starts to think about what time I
dry\n00:10:07.510 cleaner closes like I don't have\n00:10:10.209 capacity for
that and they don't have\n00:10:12.310 capacity for that level detail of
our\n00:10:13.990 work if they want it they'll ask you the\n00:10:15.700
questions it's it's this this thing that\n00:10:19.570 happens over and over
because I here's\n00:10:22.120 an example I worked with the CEO
once\n00:10:24.490 and I was hired to teach him how to talk\n00:10:26.440 to human
people like a human person it\n00:10:30.070 was a very difficult job so he
kept\n00:10:33.700 getting great donor meetings and he\n00:10:35.589 wasn't
closing any gifts and I could not\n00:10:37.899 figure out what the problem was
so\n00:10:39.190 finally I was like I'm just gonna come\n00:10:40.630 with you
it's gonna be great\n00:10:41.709 so I went with him to meetings and
what\n00:10:44.079 would happen was he was getting into\n00:10:45.490 such detail with
the donors that their\n00:10:47.950 eyes were glazing over and then after
he\n00:10:50.649 was done with his 15 minute pitch they\n00:10:53.560 literally would
say this happened like\n00:10:55.300 three times in a row god that
sounds\n00:10:57.910 great congratulations keep up the good\n00:11:00.790 work and
that was the meeting which was\n00:11:02.620 obviously not the outcome we
were\n00:11:03.850 looking for so he couldn't understand\n00:11:06.370 what I was
trying to say to him that I\n00:11:07.570 finally like in an act of
sheer\n00:11:09.100 desperation was like you know what I\n00:11:13.029 love I love
NASA\n00:11:15.970 I love NASA I think it is unbelievably\n00:11:20.649 amazing we
have figured out how to get a\n00:11:22.510 person to the moon I think it's
awesome\n00:11:25.180 I think the idea of getting someone to\n00:11:28.510 the moon
and they walk on the moon and\n00:11:30.149 god I love rocket ships I love
rocket\n00:11:33.370 ships rocket ships are amazing but if\n00:11:35.769 you start to

tell me about the rocket\n00:11:37.360 ship and how it gets to the moon and
the\n00:11:39.430 math and the science equations on how\n00:11:41.500 the rocket ship
gets to the moon I\n00:11:43.199 promise you I will hang myself with my\n00:11:45.699
own hair\n00:11:47.630 I was like that is not how you tell\n00:11:50.720 people about
your work what is the need\n00:11:53.470 like what's the point right how do
you\n00:11:56.329 address the need why are you better at\n00:11:58.130 it than anybody
else and what can they\n00:12:00.139 do to be what can you do to make it\n00:12:02.269
about them right how can they help you\n00:12:05.329 get to the moon that's the
good stuff if\n00:12:08.990 you're able to do that you're
probably\n00:12:10.190 ready to make the ask now I don't expect\n00:12:13.190
everyone to be super excited to ask\n00:12:15.170 people for money\n00:12:15.980
that's why development is an actual\n00:12:17.899 profession and not an awkward
hobby\n00:12:20.889 naturally great fundraisers love people\n00:12:24.350 they can and
will talk to anyone they\n00:12:27.259 can find common ground with
anyone\n00:12:29.060 they're your friends that talk to people\n00:12:30.709 in
the elevator or at the grocery store\n00:12:33.730 they believe in the work required
to\n00:12:37.610 both build relationships and keep them\n00:12:39.680 and they
naturally have a high tolerance\n00:12:43.759 for rejection but I don't
expect\n00:12:46.250 everyone to be a natural and you don't\n00:12:47.810 have to
be a natural to raise money you\n00:12:49.880 just have to respect the people in
the\n00:12:52.250 process\n00:12:52.819 and do the work will you reconcile
your\n00:12:57.889 baggage will you commit to build\n00:13:00.259 relationships if you
will you're ready\n00:13:02.689 to make the ask and the ask is\n00:13:04.850
oftentimes as simple as using the phrase\n00:13:06.860 would you consider would you
consider\n00:13:09.769 becoming a monthly donor would you\n00:13:11.930 consider
increasing your support to \$100\n00:13:14.540 would you consider investing in our
work\n00:13:16.759 at the \$1,000,000 level would you\n00:13:19.370 consider does a
couple of awesome things\n00:13:21.410 one it gives the donor and easy way
to\n00:13:23.389 out like they can say no without it\n00:13:25.220 being yes now and
to gives you a second\n00:13:27.949 ask well what would you consider\n00:13:31.269
it's good right when you do this\n00:13:35.990 remember you're not asking
for yourself\n00:13:38.240 you're asking on behalf of all of the\n00:13:39.920
people you serve or are touched by your\n00:13:42.139 genius this isn't a
personal favor right\n00:13:45.380 feel proud of the ask it's
incredible\n00:13:47.930 that you do this work don't try to be\n00:13:51.050
someone you're not you're gonna go to\n00:13:52.250 these meetings and think
you need to\n00:13:53.360 bigshot it be yourself authenticity\n00:13:55.519 matters
nobody likes a phony just be\n00:13:58.100 yourself and please please don't
Harvey\n00:14:02.029 do your own ask what I mean by this is\n00:14:04.759 don't
walk into the meeting and say I\n00:14:07.310 had an IDI that did this all the time
I\n00:14:09.259 stopped inviting him he'd say we're not\n00:14:12.079 here
today to ask you for money yes we\n00:14:16.639 are that's exactly why we're
literally\n00:14:20.389 that's why we're here today don't
do\n00:14:23.360 that don't say whatever you can do to\n00:14:26.209 help that is
hands down the fastest way\n00:14:29.120 to get the smallest possible
gift\n00:14:30.769 someone thinks they can give you and get\n00:14:32.209 away with
not kidding and don't take it\n00:14:35.630 back once you've made the ask
would you\n00:14:37.940 consider supporting us at the \$10,000\n00:14:40.279 level or
the five or the two or one you\n00:14:43.250 know what take the year off you're

the\n00:14:44.480 best thanks don't do that ask the\n00:14:48.589 question wait till ten count to ten\n00:14:51.560 before you speak again keep your face\n00:14:53.540 like this they are grown-ups they have\n00:15:00.410 all the power in this situation they can\n00:15:02.839 answer the question don't take it back\n00:15:05.110 which brings me to my favorite don't ask\n00:15:08.209 don't get if you don't make an actual\n00:15:10.699 ask no one will give you actual money\n00:15:12.769 and if no one gives you actual and money\n00:15:14.870 you actually can't do anything with it\n00:15:16.490 it's very simple don't ask don't get\n00:15:20.769 listen I would love to live in a world\n00:15:23.029 or we didn't have to ask people for\n00:15:24.680 money to do important work that will\n00:15:27.529 change people's lives I would love to\n00:15:29.839 not have to teach people how to make a\n00:15:31.399 case for the importance of feeding and\n00:15:33.649 housing and educating people but this is\n00:15:36.800 the world that we live in and if we're\n00:15:38.240 committed to doing this work and doing\n00:15:40.310 it well we have to be as\n00:15:42.380 committed to the art of funding this\n00:15:43.790 work as we are to the art of executing\n00:15:45.350 it I'm going to repeat that because I\n00:15:47.660 think it's really important we have to\n00:15:49.970 be as committed to the art of funding\n00:15:52.280 our work as we are to the art of\n00:15:54.170 executing that and it at its core the\n00:15:57.680 art of funding the work means that we\n00:15:59.210 have to truly believe that the purpose\n00:16:01.400 and the privilege of our work is to\n00:16:03.860 provide people with an extraordinary way\n00:16:07.100 to use their wealth that will change\n00:16:08.690 people's lives it's an opportunity\n00:16:11.950 because at its core that's what it is\n00:16:14.480 how great is that thank you\n00:16:18.110 [Applause]\n", "title": "tactiq-free-transcript-SUvoBzjZv7E.txt", "tether_id": null}, {"status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4", "default_model_slug": "gpt-4", "parent_id": "827358c1-0a46-4572-a15c-ac74270fd857", "request_id": "89369b69a8df83a6-MXP", "timestamp_": "absolute"}, {"recipient": "all", "channel": null}, {"parent": "827358c1-0a46-4572-a15c-ac74270fd857", "children": ["9e82693f-2657-4113-ac22-f3c98f43de54"]}, {"9e82693f-2657-4113-ac22-f3c98f43de54": {"id": "9e82693f-2657-4113-ac22-f3c98f43de54", "message": {"id": "9e82693f-2657-4113-ac22-f3c98f43de54", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1718329194.004412, "update_time": null, "content": {"content_type": "tether_quote", "url": "file-pc wd57zjSDXCV2w7l rqwji5X", "domain": "Week 7_Building on Relationships.pdf", "text": "\nBUILDING ON RELATIONSHIPS: A FUNDRAISING\nAPPROACH FOR COMMUNITY COLLEGES\n\nMargarete Rooney Hall\nUniversity of Florida, Gainesville,\nFlorida, USA\n\nThis article considers the importance of relationship building to community college resource development efforts. It draws on concepts and theories from the\nof public relations, fund raising, and higher education to demonstrate that strategic management of relationships is a foundation of a successful resource development effort. This article discusses the conceptual link between fund raising and\nrelationship building. Characteristics of relationships, including trust, mutuality\nof control, satisfaction, and commitment are discussed, as are two types of\nrelationships colleges have with their various publics: exchange and communal.\n\nImplications for practice and for future research in this area are provided. The\narticle concludes that because community colleges have a tradition of

building\nclose working relationships with key organizations, institutions, and individuals\n\nin their communities, the colleges are well positioned for receiving increased levels\n\nof private support.\n\nAs the need for private support has increased at community colleges,\nGlass and Jackson (1998a; 1998b) and Jackson and Glass (2000) have\nprovided clear and insightful guidance for college leaders. They have\ndemonstrated the importance of integrating institutional planning\ninto resource development efforts, speci\uffed the role of the president as\nthe leader of the resource development team (Glass & Jackson, 1998b),\nand discussed the emerging trends and critical issues that affect fund\nraising (Jackson & Glass, 2000). Resource development efforts also can\nbene\uffed from the well-established relationships that most community\ncolleges, their presidents, and others leaders have with key con-\nstituent groups and with in\uffeddential individual members of their\ncommunities.\n\nCommunity colleges traditionally have placed a high value on the\nestablishment of strong relationships with their communities.\n\nAddress Correspondence to Dr. Margarete Rooney Hall, University of Florida, P.O.\nBox 118400, Weimer Hall, Gainesville, FL 32611-8400, USA. E-mail: mhall@jou.u\uffed.edu\n\nCommunity College Journal of Research and Practice, 26: 47-60, 2002\nCopyright # 2002 Taylor & Francis\n1066-8926/02 \$12.00 +.00\n\n47\n\nPresidents, trustees, and resource development professionals have\nrelied on the college\2013 community relationship to encourage public and\nprivate support for the colleges. One of the two community college\npresidents quoted by Duronio and Loessin (1991) in Effective Fund\nRaising in Higher Education described his fundraising plans\nby saying:\n\nWe opened our library to the community. . . . Seven thousand people in\nthe community used the library last year. We haven\2019t asked them for a\ndonation. About 80,000 people attended events in our theater last year.\nWe\2019ve never asked them for a gift. For a program in our new\n\uffedtness\ncenter, we anticipated that about 200 people would enroll, but 550\nregistered in the fall and 475 registered in the winter. Those are people\nin the community who pay \$30 for use of this wonderful modern facility\nfor a full eleven weeks. What a bargain! We ought to be building on those\ncommunity ties. (p. 190)\n\nThe other president quoted said that \2018\2018he spends most of his fund-\nraising time talking to donors about their previous gifts, actual\ndevelopments on campus as a result of their earlier support, and\ncontinuing opportunities for donors to enrich (the) college\2019\2019 (Duronio &\nLoessin, p. 180).\n\nEach of these presidents described a relationship between the col-\nlege and key members of the community. Each implied that\nstrengthening the relationship between the college and key members\nof the community would increase private \uffednancial support. The re-\nlationships they described vary. In the \uffedrst case, the president focused\nmore on the fair exchange of support for excellent services and pro-\nducts. In the second, the president described a relationship that was\nless about a current exchange. He described a type of stewardship that\nlinked donors\2019 past support not just to the immediate results it pro-\nduced for them, but also to the long-term success of the mission, stu-\ndents, and programs the donors cared about.\n\nDonors, too, have described their giving to a particular community\ncollege in terms of their relationship to that college. For example,\nAllen and Isabelle Leepa gave a \$19 million art collection to St. Pe-\ntersburg Junior College. Leepa described their thinking this way: \2018\2018We\nwere drawn to this college. There is a kind of pioneer spirit here. They\nwere so enthusiastic to get it, it reminded me of why I got into art in\nthe \uffedrst place\2019\2019 (Van der Werf, 1999, p. A42).\n\nLeepa

implied little concern about he and his wife receiving an immediate exchange for their support; rather, they were concerned about rewarding and supporting the creative and innovative spirit they admired in the college.

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BUILDING COLLEGE COMMUNITY RELATIONSHIPS

From their beginnings, community colleges have nurtured links to their communities, and they have worked to create relationships based on a fair exchange of fees and services. They also have established relationships based on the colleges and their communities each working to assure the other thrives for the long term. Community colleges have existed as open systems, drawing resources from the environment, transforming those resources, and returning them to the environment with value added so that the entire community is richer (Seymour, 1989). Community colleges have created an expanding resource pool that supports the community's well being and ultimately enables the community to provide more resources to the colleges.

Community colleges often have collaborated with companies in their regions to provide courses and training in areas of special interest and need to the companies. Such collaborations are important for receiving corporate support, as Stendardi points out, because:

The primary characteristic of modern corporate philanthropy is that it is intended to produce a more specific, more measurable benefit in a relatively short time period (1992, p. 24).

Collaborations also help build relationships between college and company leaders and those relationships are the key to mutually beneficial agreements. As Peters tells us:

Relationships really are all there is (1992, p. 91).

According to Wharton:

Effective community colleges are those that satisfy, preferably delight, the key stakeholders they serve, which include students, faculty, staff, and the community (1997, p. 15).

THE CONCEPTUAL LINK BETWEEN FUND RAISING AND RELATIONSHIP BUILDING

Seasoned fundraising practitioners have passed their hard-learned lessons to professional newcomers through personal mentoring, workshops and seminars, and many excellent books and articles (Broce, 1986; Buchanan, 2000; Hall, 1993; Howe, 1991; Rosso & Associates, 1991; Seymour, 1966/1988; Worth, 1993). In her groundbreaking book on fund raising, Kelly (1998) relates these practitioner lessons to theories from the fields of organizational behavior, public relations, and communications. Kelly describes four models of fund raising that she adapted from the scholarly work of Grunig (Grunig & Grunig, 1992; Grunig & Hunt, 1984). Each of Kelly's fundraising models is connected to a parallel one of Grunig's public relations models.

Relationship-Based Fund Raising

The first model, a publicity model described by Grunig and his colleagues (Grunig & Grunig, 1992; Grunig & Hunt, 1984), was developed in the 19th century and was typified by P. T. Barnum, who skillfully promoted his circus performers using the axiom

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references provided:\n\n1. Gregg Lunceford (Forbes Article):\n - Main Ideas:
Lunceford discusses the importance of understanding one's relationship with money.
He explores how financial wellness is integral to overall well-being and stresses the
need to have a healthy relationship with money, which is often shaped by early
experiences and societal messages.\n - Goal: The article aims to prompt readers
to reflect on their financial behaviors and relationships, encouraging a thoughtful
approach to managing money to enhance financial and personal well-being.\n\n2.
Margarete Rooney Hall (Building on Relationships):\n - Main Ideas: Hall
emphasizes the importance of relationship-building in fundraising efforts,
particularly for community colleges. The article outlines the different types of
relationships (exchange and communal) and the role of trust, commitment, and mutual
satisfaction in fostering long-term support.\n - Goal: This work aims to provide
a theoretical and practical foundation for improving fundraising strategies through
effective relationship management, ultimately securing more private support for
community colleges.\n\n3. Najev \u010ca\u010dija (Fundraising in Nonprofit Strategic
Marketing):\n - Main Ideas: \u010ca\u010dija presents a conceptual model
linking strategic marketing and fundraising in the nonprofit sector. The model
suggests integrating marketing strategies to enhance fundraising efforts, emphasizing
the need for a strategic approach to engage potential donors effectively.\n -
Goal: The article seeks to extend the theoretical framework of nonprofit marketing
to include fundraising as a central component, offering a structured approach to
increase funding through strategic marketing efforts.\n\n4. Kara Logan Berlin (TEDx
Talk):\n - Main Ideas: Berlin discusses effective strategies for fundraising,
focusing on the emotional and relational aspects of asking for support. She highlights
the importance of understanding one's own attitudes towards money and building
genuine relationships with potential donors.\n - Goal: The talk aims to change
the negative perception of fundraising and equip listeners with practical tips and a
positive mindset towards raising funds, emphasizing it as an opportunity to enable
social change.\n\nOverall, these works collectively highlight the psychological
and relational dynamics of money and fundraising. They advocate for a deeper
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generate the highest social return on investment. This approach involves leveraging their resources to strengthen high-performing organizations stimulate innovation and drive systemic changes that tackle the root causes of societal problems.

Part B: Describe the differences between development and fundraising and how they relate to one another. Then describe how you will enact development plans that will positively contribute to your fundraising.

While the terms development and fundraising are often used interchangeably they have distinct roles within an organization. Fundraising primarily involves collecting monetary support usually focusing on immediate financial targets and often driven by specific events or campaigns. On the other hand development encompasses a broader scope. It includes fundraising but extends to nurturing long-term relationships with donors strategic resource planning and fostering a philanthropic culture within and around the organization (Frumkin 2005).

The strategic nature of development plans is a crucial element in enhancing fundraising efforts. These plans are not solely focused on acquiring funds but on retaining and engaging donors over the long term. They involve understanding donors' motivations aligning these motivations with the organization's goals and creating meaningful engagement opportunities. This approach not only secures immediate financial support but also establishes a base of loyal supporters who are committed to the organization's mission in the long run (Frumkin 2005).

At the Global Happiness Initiative Foundation I would implement these concepts in a variety of impactful ways. First I would foster community engagement ensuring that development activities deeply resonate with community needs and values. Second I would prioritize transparency providing clear information on how funds are used to strengthen trust and deepen donor relationships. Lastly I would diversify funding sources by exploring revenue streams beyond traditional donations such as social enterprises or membership programs enhancing financial stability and ensuring alignment with the organization's mission. These strategies when implemented collectively would significantly boost fundraising efforts and align them with the broader goal of fostering a more equitable and joyful society.

Part C: David Rubenstein discusses how anyone can be a philanthropist. He used his wealth to do patriotic philanthropy to purchase rare documents for public consumption and fix historic buildings so Americans can learn more about their history. David reminds the listeners that although he has spent large sums of money on philanthropy you don't need to spend money to be a great philanthropist. Describe how you have been or will be a great philanthropist.

As the conceptual founder of the Global Happiness Initiative Foundation (GHIF) I am deeply inspired by the idea that effective philanthropy does not require vast wealth. This is reflected in David Rubenstein's (2015) notion of "patriotic philanthropy" where he uses his resources to enhance public knowledge and national pride by preserving historical documents and monuments. Though GHIF is currently just a vision it embodies my commitment to using available resources be it time expertise or networks to foster societal improvement. My vision for GHIF includes initiatives that go beyond financial aid aiming to address essential human needs such as healthcare mental wellness education and enriching travel experiences that broaden perspectives and promote understanding. Research indicates that corporate philanthropy can significantly impact societal causes even when it involves non-monetary contributions such as volunteer work and expertise (Van der Heyden & Van der Rijt 2004).

From my perspective philanthropy is about actively contributing to the betterment of society and creating opportunities that allow individuals to thrive. Studies have

shown that corporate philanthropy can enhance both social and economic outcomes benefiting communities and improving corporate reputation and performance (Navickas & Kontautien\u0117 2011). I believe that true philanthropic wealth is measured not by personal gain but by the impact we have on the lives of others. As GHIF takes shape it will strive to turn these principles into action aiming to make a significant and positive difference in the world.\n\n\nDavid Rubenstein (Director). (2015 July 14). Everyone can be a philanthropist | David Rubenstein | TEDxPennsylvaniaAvenue. <https://www.youtube.com/watch?v=ClnCelvaook>\nFrumkin P. (2005). On being nonprofit: A conceptual and policy primer (1. Harvard Univ. Pr. paperback ed). Harvard Univ. Press.\nNavickas V. & Kontautien\u0117 R. (2011). Influence of corporate philanthropy on economic performance. Business: Theory and Practice 12(1) 15\u201323.\nPorter M. E. & Kramer M. R. (1999 November 1). Philanthropy\u2019s New Agenda: Creating Value. Harvard Business Review. <https://hbr.org/1999/11/philanthropys-new-agenda-creating-value>\nVan der Heyden C. & Van der Rijt G. (2004). Societal marketing and philanthropy in Dutch companies. Journal of Nonprofit & Public Sector Marketing 12(1) 23\u201336.", "title": "GW DQ4.docx", "tether_id": null, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4", "default_model_slug": "gpt-4", "parent_id": "aaa2a992-904d-4ecc-b637-02a4b21ae0d9", "request_id": "8936ac300bd34be8-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null, "parent": "aaa2a992-904d-4ecc-b637-02a4b21ae0d9", "children": ["83d6864f-45b9-454b-90f5-c1687f831a40"]}, "83d6864f-45b9-454b-90f5-c1687f831a40": {"id": "83d6864f-45b9-454b-90f5-c1687f831a40", "message": {"id": "83d6864f-45b9-454b-90f5-c1687f831a40", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1718329895.181205, "update_time": null, "content": {"content_type": "tether_quote", "url": "file-LmtGnZm6QCfX16jTGN8P3tmf", "domain": "GW ASSIGNMENT 2.docx", "text": "Global Happiness Initiative Foundation\n\nAlexis Lindsay\n\nClaremont Lincoln University\n\nMSI 5323-01: Grant Writing and Sustainable Fundraising\n\nProfessor Javier Lopez\n\nJune 2 2024Table of Contents\n\n\tExecutive Summary\t4\n\n\t\tIntroduction\t6\n\n\t\t\tPurpose\t7\n\n\t\t\tGoals\t7\n\n\t\t\tObjectives\t8\n\n\t\t\tOrganizational Capacity\t10\n\n\t\t\tFoundation Structure and Management Capability\t10\n\n\t\t\tFounding Team Expertise\t10\n\n\t\t\tProject Management Systems\t11\n\n\t\t\tPreparatory Actions for Grant Management\t11\n\n\t\t\tDemonstrating Capacity through Strategic Intentions\t11\n\n\t\t\tCross-Sector Collaboration\t11\n\n\t\t\tLocalized Educational Partnerships\t12\n\n\t\t\tHealthcare Alliances\t12\n\n\t\t\tPublic-Private Partnerships\t13\n\n\t\t\tCommunity Engagement\t13\n\n\t\t\tProgram Plan\t13\n\n\t\t\tIntroduction to Program Strategy\t13\n\n\t\t\tIntegration with Government and Healthcare Services\t14\n\n\t\t\tWellness Travel Model\t15\n\n\t\t\tHolistic Educational Access\t15\n\n\t\t\tTimeline and Evaluation\t16\n\n\t\t\tEvaluation Capacity for the Global Happiness Initiative Foundation (GHIF)\t18\n\n\t\t\tFormative and Summative Evaluation: Rationale\t18\n\n\t\t\tGuiding Evaluation Questions\t18\n\n\t\t\tData Collection Tools\t21\n\n\t\t\tTheory of Change\t23\n\n\t\t\tLogic Model for GHIF Programs\t25\n\n\t\t\tBudget\t28\n\n\t\t\tBudget Justification\t30\n\n\t\t\tReferences\t32\n\n\nExecutive Summary\n\nThe Global Happiness Initiative Foundation (GHIF) enhances global well-being by improving access to healthcare education and cultural immersion. Our mission is based on the belief that individual happiness is a societal asset fostering a healthier more resilient and interconnected world. GHIF focuses on healthcare access educational opportunities and

wellness travel experiences. By partnering with local healthcare providers academic institutions and travel agencies GHIF aims to deliver services that address immediate and long-term needs. The purpose of GHIF is to improve overall well-being and happiness globally. We aim to increase access to well-being services in the United States and Italy and establish and strengthen partnerships with local and international organizations. Our objectives include launching educational programs reaching over 5000 individuals securing healthcare partnerships with at least five major providers and developing a wellness travel model ready for implementation within 18 months. Our Theory of Change centers on the idea that enhanced access to healthcare education and cultural experiences leads to a healthier more connected society. By organizing mobile health clinics providing mental health counseling and conducting preventive health workshops we aim to improve health outcomes. Expanding educational opportunities through after-school programs scholarships and vocational training will improve psychological well-being. The wellness travel model will integrate health-promoting activities with cultural experiences to reduce stress and enhance mental health. Evaluation is crucial to our strategy. We use a mixed-methods approach combining formative and summative assessments to ensure continuous improvement and measure program effectiveness. Data collection tools include surveys interviews focus groups and program monitoring data. We are requesting a grant of \$3000000 which covers healthcare services educational programs wellness travel experiences administrative costs and evaluation. This budget ensures effective resource allocation for immediate and long-term impact. By leveraging donor support and strategic partnerships GHIF aims to make a significant and sustainable impact on global well-being. Our approach emphasis on collaboration and commitment to community engagement ensure that our initiatives are culturally relevant and meet local needs fostering a happier healthier and more interconnected world.

Introduction

The Global Happiness Initiative Foundation's mission vision and objectives are rooted in the idea that an individual's happiness is not just a personal achievement but a societal asset. A content person is a beacon of positivity capable of enriching their community. When we collectively strive for happiness we also invest in our well-being and foster a society free from the shackles of discontent. As the renowned author John Donne (2010) famously proclaimed "No man is an island." This sentiment holds true in our pursuit of societal greatness. Achieving this requires unity and collaboration. However when an individual is grappling with internal conflicts such as mental health struggles physical ailments and a general decline in well-being overcoming these challenges alone becomes an insurmountable task. Wellness is not just a personal concern but a societal issue that impacts us all. In addition to discussing wellness it is necessary also to address the role of education. If wellness is the foundation education is the next step where individuals acquire the skills needed to lead purposeful dignified and joyful lives. Nobody is inherently equipped with the knowledge to improve their surroundings; it must be learned. Therefore education holds equal significance in the pursuit of wellness. As one begins to grasp the world's order concepts like the principles of space and time the philosophies of Aristotle the mathematics of our universe and the evocative poetry of Yates one starts to perceive the world in a new nuanced way. Therefore to truly understand oneself it is sometimes necessary to first understand one's environment. Thus in parallel with well-being education holds great importance. As individuals gain knowledge about the world around them they instinctively desire to explore it further engaging with it through the senses of touch taste and sight. Rather than solely

studying Mozart and reading musical notations experiencing the music in person is essential. Therefore travel is an invaluable gateway to becoming a well-rounded individual capable of positively contributing to society.

The Global Happiness Initiative Foundation is committed to creating a better world. By leveraging the support of donor investors the foundation aims to empower individuals to pursue their own happiness by providing necessary tools. Our efforts involve establishing partnerships with local government bodies and healthcare providers to ensure easy access to government services and healthcare and make travel accessible to all who desire it. These initiatives will lay the foundation for our long-term vision of a globally interconnected and joyful society.

Purpose

The primary purpose of the Global Happiness Initiative Foundation is to enhance the overall well-being and happiness of individuals globally through increased access to essential life-enhancing services. The Global Happiness Initiative Foundation is committed to providing the necessary tools for individuals to pursue their happiness. Our starting point is ensuring access to healthcare and mental health services as a fundamental human right and a crucial component in our efforts to build a better world. We also aim to utilize well-being travel cultural immersion and education resources to empower individuals to gain self-awareness understand others and collectively achieve holistic happiness.

Goals

The Global Happiness Initiative Foundation is committed to enhancing the global quality of life through two strategic goals.

Long-term Goal: Increase Access to Key Well-being Services

Our long-term goal is to significantly increase access to well-being services globally with our efforts first being localized in the United States and Italy. By doing so we strive to improve the quality of life and foster sustained happiness in diverse communities. This goal will benefit the communities we serve and provide donor-investors with the satisfaction of knowing that their support is making a tangible difference in people's lives. The impact of these programs will be measured by tracking the number of individuals accessing these services the improvement in health and education outcomes and overall satisfaction rates among participants reflecting the direct benefits of our initiatives.

Short-term Goal: Establish and Strengthen Partnerships

Partnerships are at the heart of our strategy. Our short-term goal is to establish and strengthen partnerships with local and international public and private organizations. These partnerships are beneficial and crucial for enhancing our capability to deliver critical services effectively and efficiently. By collaborating with organizations with established infrastructures and expertise in our target regions we can leverage their strengths to better serve the communities' needs. Formalizing at least five significant partnerships within the first six months will be vital to achieving this goal.

Both goals complement existing efforts in the target communities rather than duplicate them ensuring that our interventions add value and create a measurable impact. Through these focused efforts the Global Happiness Initiative Foundation seeks to build a foundation for long-term social change that contributes to the well-being of individuals worldwide.

Objectives

The Global Happiness Initiative Foundation (GHIF) has set ambitious yet achievable objectives to ensure a broad and lasting impact on global well-being.

Educational Expansion

Our first objective focuses on education expansion. Within the first year GHIF plans to launch educational programs in at least two countries aiming to reach over 5000 individuals. These programs will be developed to address local educational gaps better equip youths with functional skills and promote holistic learning experiences. Evidence shows that educational programs can significantly enhance psychological well-being by increasing self-efficacy social

support and overall life satisfaction (Ross & Van Willigen 1997). Moreover education has been linked to improved health outcomes and better mental health with increased years of education correlating with lower rates of depression and anxiety (Kondirolli & Sunder 2022). The success of these programs will be measured by the number of programs successfully launched the total number of participants enrolled and participant feedback on program effectiveness.

Healthcare Partnerships

Simultaneously GHIF aims to establish healthcare partnerships to enhance access to medical and mental health services. We plan to secure partnerships with at least five major healthcare providers by the end of the first six months. These collaborations focus on providing comprehensive health services emphasizing preventive care and mental health vital to improving individual well-being. Studies have shown that partnerships between educational institutions and healthcare providers can significantly improve health outcomes particularly in preventive care and mental health services (Ross & Wu 1995). The effectiveness of these partnerships will be assessed through the number of agreements signed the range of services provided and feedback from service users regarding the accessibility and quality of care.

Wellness Travel Model

Lastly our third objective is to develop a wellness travel model which will be designed developed and ready for implementation within the first eighteen months. This model will provide frameworks for wellness-oriented travel experiences promoting mental and physical health benefits through carefully crafted travel packages. Wellness programs embedded in educational and travel contexts have positively impacted well-being reducing stress and improving mental health (Young et al. 2020). The model's success will be evaluated based on participant satisfaction measured through surveys and the repeat engagement rate indicating the model's appeal and effectiveness in enhancing participants' well-being.

Organizational Capacity

Foundation Structure and Management Capability

The Global Happiness Initiative Foundation (GHIF) is designed to be a robust organization capable of managing large-scale projects and substantial grants. At its inception GHIF will establish a governance structure with a board of directors comprising education healthcare mental health and non-profit management experts. This board will provide strategic oversight and ensure all activities align with our mission and objectives.

Founding Team Expertise

The founding team of GHIF includes highly qualified professionals selected for their extensive experience in project management international development healthcare and educational programming. Our recruitment strategy focuses on identifying individuals with a proven track record such as a Project Director with significant experience in managing and scaling community health programs an Education Specialist renowned for developing effective curricula in diverse cultural settings and a Mental Health Advocate with a strong background in leading global mental wellness initiatives. This planned assembly of expertise ensures a comprehensive and skilled approach to achieving the foundation's objectives.

Project Management Systems

GHIF will implement rigorous project management methodologies to oversee all foundation activities. We will utilize established frameworks such as the Project Management Body of Knowledge (PMBOK) guidelines to plan execute monitor and close projects. Additionally GHIF will adopt modern project management tools for real-time tracking and reporting facilitating transparent and efficient management of the grant funds.

Preparatory Actions for Grant Management

Prior to receiving the grant GHIF will:

- Formulate detailed project plans including timelines budgets and resource allocation.
- Establish financial management policies tailored to ensure accountability and prudent use of

funds. \nInitiate discussions with potential partners and stakeholders to build a support network for immediate project launch upon funding. \nDemonstrating Capacity through Strategic Intentions \nWhile GHIF is a nascent organization our strategic planning reflects a clear and actionable roadmap for immediate impact upon funding. The foundation's goals are backed by a commitment to leverage the diverse skills of its team and the strategic insights of its board to establish a high-performing organization. GHIF's initial actions and detailed project preparations demonstrate our readiness and capability to effectively manage and utilize the grant to achieve significant social impact. \nCross-Sector Collaboration \n

The Global Happiness Initiative Foundation (GHIF) is committed to developing localized high-impact programs that serve as models for global implementation. To achieve this GHIF emphasizes cross-sector collaboration mainly focusing on strategic partnerships in Italy and the United States. These collaborations are designed to leverage regional strengths and address specific local needs ensuring the adaptability and effectiveness of our well-being services. \nLocalized Educational Partnerships \nGHIF will collaborate with leading educational institutions in Italy and the United States to integrate well-being practices into educational curricula. This initiative will focus on regions with significant disparities in educational outcomes providing targeted interventions that are culturally and contextually relevant. Research indicates collaborative learning environments and educational partnerships can significantly enhance student outcomes and well-being (Kilgo et al. 2015). Success in these partnerships will be evaluated based on academic improvements student well-being metrics and the scalability of the programs to other regions. \nHealthcare Alliances \nGHIF plans to partner with healthcare organizations in Italy and the United States to increase access to quality health services. These partnerships will focus on integrating mental health services with primary care a critical need in both countries as local health reports indicate. Indeed studies have shown that cross-sector healthcare collaborations can improve health outcomes particularly when mental health services are integrated with primary care (Randall et al. 2023). By working with local health providers and community organizations these initiatives aim to create sustainable health improvement models suitable for global replication. \nPublic-Private Partnerships \nGHIF will seek partnerships with local government bodies and private sectors in Italy and the United States to support infrastructure development vital to program delivery. These partnerships will help facilitate the creation of community wellness centers which will serve as hubs for education healthcare and community activities. Effective public-private partnerships have been shown to enhance community health and well-being significantly (Ovseiko et al. 2014). The effectiveness of these centers will be measured through community engagement rates and the overall improvement in community health and educational outcomes. \nCommunity Engagement \nIntegral to our strategy is the direct involvement of local communities in Italy and the United States in the planning and implementation phases. GHIF believes that community input is essential to tailoring programs that genuinely reflect and meet local needs. Feedback mechanisms and community advisory boards will be established to monitor the programs' impacts and guide iterative improvements as evidence proves that community involvement is crucial for the success and sustainability of public health programs (Mattessich & Rausch 2014). \nProgram Plan \nIntroduction to Program Strategy \n

The Global Happiness Initiative Foundation (GHIF) is committed to addressing critical needs in communities across the United States and Italy. We implement multifaceted strategies that enhance individual well-

being and community health specifically designed to complement rather than duplicate existing services. Our comprehensive approach leverages local strengths and targets specific challenges through innovative and sustainable solutions.

Integration with Government and Healthcare Services

Our initiative targets significant gaps in access to healthcare and government support services. These gaps have been identified through extensive community outreach and stakeholder engagement underscoring a pressing need for improved service accessibility and quality. To address these challenges GHIF plans to forge strategic alliances with local health departments and social service agencies creating a referral network that facilitates individuals' access to the services they need. This network aims to increase the efficiency and responsiveness of health and social care systems.

Partnership development is crucial for the success of our healthcare integration strategy. By collaborating with local health authorities and service providers we aim to establish robust partnerships that facilitate streamlined access to healthcare and support services. These partnerships will be foundational in building a comprehensive referral system that enhances service delivery and meets the specific needs of the communities we serve.

In addition to building partnerships GHIF will engage in advocacy and policy work to enhance healthcare delivery. We will work closely with policymakers to advocate for regulations and policies prioritizing the health and well-being of underrepresented communities. Our focus on advocacy aims to influence policy changes that improve healthcare accessibility and address systemic barriers in service delivery.

Training community health workers is another critical component of our strategy. GHIF will implement comprehensive training programs designed to enhance the capabilities of health workers in assisting individuals effectively. These programs will focus on developing empathy technical skills and a deep understanding of the healthcare system. This will ensure that community health workers are well-equipped to support individuals in navigating health and social services.

Wellness Travel Model

GHIF recognizes the therapeutic potential of travel in promoting mental and physical well-being. To harness this potential we are developing a Wellness Travel Model that integrates health benefits with cultural and educational experiences. This innovative approach to wellness extends beyond traditional health settings and includes travel packages that feature guided meditations wellness workshops and cultural tours. Each package is designed in collaboration with travel experts and cultural institutions to ensure that it offers genuine health benefits and facilitates cultural appreciation.

Community-based involvement is integral to the design and execution of our Wellness Travel Model. We engage local communities in developing travel experiences to ensure they are culturally respectful and enriching for visitors and hosts. This engagement helps create authentic travel experiences sensitive to the host communities' cultural dynamics and provides meaningful interactions that benefit all participants.

Holistic Educational Access

GHIF is also dedicated to transforming educational access by integrating a curriculum that includes advanced technology training and comprehensive arts education. This holistic approach aims to bridge the gap in technological and creative skills preparing individuals for the demands of the modern workforce and personal development. Our curriculum includes coding robotics visual arts and music training and is designed to be integrated into school systems and community learning centers.

GHIF will establish ongoing learning opportunities through workshops and seminars open to all age groups to complement our formal education initiatives. These initiatives focus on continuous skill development and personal growth promoting lifelong learning and adaptability. By offering workshops and seminars that cover a

range of skills and artistic disciplines we aim to foster an environment of continuous learning and creative exploration.

Timeline and Evaluation

The timeline for these initiatives is strategically set to ensure a phased implementation. By the end of the second quarter of 2025 GHIF will establish the initial partnerships necessary for the referral systems and develop training programs for community health workers. Following the establishment of partnerships early in the same year the Wellness Travel Packages are expected to be launched by the third quarter of 2025. Educational program rollouts will begin in the fourth quarter of 2024 and be fully implemented across targeted regions by the second quarter of 2025. Each element of the program plan is designed to measure specific outcomes related to access satisfaction and educational attainment ensuring that GHIF's interventions create measurable and sustainable impacts in the communities served. This strategic planning demonstrates GHIF's capability to manage a large grant effectively and fulfill its mission of building a foundation for long-term social change that contributes significantly to global well-being.

GHIF Project Timeline and Deliverables

Deliverables	Activities	Due Date	Expected Challenges
Set up Referral Systems	Establish partnerships		
Develop training for staff	Q2 2025		Regulatory hurdles securing partner cooperation
Launch Wellness Travel Packages	Design packages negotiate with travel agencies	Q3 2025	Logistics coordination ensuring accessibility and inclusion
Rollout Educational Programs	Develop curricula and integrate into schools	Q4 2025	Adaptation to local educational standards funding
Public Workshops and Seminars	Plan and implement workshops and lifelong learning seminars	Q1 2026	Community engagement sustaining interest over time

Evaluation Capacity for the Global Happiness Initiative Foundation (GHIF)

The Global Happiness Initiative Foundation (GHIF) is dedicated to improving individual well-being and societal happiness through strategic and well-defined programs. Evaluating these initiatives is critical to understanding their impact and continuously refining their effectiveness. GHIF's evaluation approach incorporates formative and summative assessments to ensure comprehensive feedback and learning throughout the project lifecycle (Serrat 2017).

Formative and Summative Evaluation: Rationale

GHIF employs a mixed-methods evaluation strategy combining both formative and summative evaluations. Formative evaluation is ongoing and focuses on process evaluation intended to improve program implementation in real-time by identifying and addressing operational issues as they arise. This approach is aligned with the foundation's adaptive management strategy allowing for continuous improvements based on systematic data collection and analysis (Hayes et al. 2011). Summative evaluation occurs at the end of the project cycle aiming to assess the outcomes and impact of the interventions. This will provide GHIF and its stakeholders with evidence of the program's effectiveness and insights into how the initiatives have contributed to the long-term goal of increased well-being and happiness. The rationale behind this dual approach is to ensure that while the program's processes are optimized for success their ultimate effectiveness in achieving the desired outcomes is also rigorously assessed (SoPact 2020).

Guiding Evaluation Questions

The effectiveness of GHIF programs in increasing access to critical well-being services in targeted communities is critical to the foundation's mission. One of the guiding evaluation questions asks "How effectively do the GHIF programs increase access to key well-being services in targeted communities?" Measuring how effectively these programs enhance access involves assessing improvements in health outcomes increased usage of services and

participant satisfaction. For example providing mental health services and preventive care through local partnerships can significantly reduce barriers to accessing these services thereby enhancing overall community well-being (Ross & Wu 1995). Successful implementation of these programs leads to a healthier population directly contributing to GHIF's overarching goal of fostering societal harmony and happiness. This focus on accessibility is essential as it ensures that the benefits of GHIF's initiatives reach the most vulnerable populations ultimately promoting equity and inclusivity in health and well-being.

Understanding the measurable impacts of the educational programs on participants' psychological well-being and social support systems is another crucial aspect of the evaluation. The question "What are the measurable impacts of the educational programs on participants' psychological well-being and social support systems?" guides this analysis. Educational programs profoundly impact participants by improving self-efficacy and fostering a sense of community which can alleviate feelings of isolation and anxiety (Ross & Van Willigen 1997). The GHIF's educational initiatives aim to equip individuals with functional skills and holistic learning experiences thereby improving mental health outcomes and strengthening social support networks (Kondiroli & Sunder 2022). This enhanced psychological well-being supports the foundation's broader objective of achieving holistic happiness through education. It creates a ripple effect where educated individuals can contribute positively to their communities furthering societal well-being.

Another key evaluation question is evaluating the extent to which healthcare partnerships have enhanced access to medical and mental health services. Examining "To what extent have healthcare partnerships improved access to medical and mental health services?" is essential for understanding the impact of collaborative health efforts. Healthcare partnerships are crucial for improving access to these services by integrating mental health services with primary care and ensuring comprehensive healthcare delivery especially in underserved areas (Randall et al. 2023). The effectiveness of these partnerships in the GHIF's model can be measured by the range and quality of services provided and the level of accessibility experienced by community members. Successful healthcare partnerships support the foundation's goal of enhancing global quality of life through improved health outcomes and demonstrate the importance of collaborative approaches in addressing complex health issues. These partnerships ensure services are delivered efficiently and sustainably maximizing their impact on community health.

Evaluating how participants perceive the quality and benefits of the wellness travel model is crucial in determining its success and potential for broader application. The guiding question "How do participants perceive the quality and benefits of the wellness travel model?" addresses this aspect. Positive feedback and high satisfaction levels can indicate these travel experiences' effectiveness in promoting mental and physical health (Young et al. 2020). GHIF's wellness travel initiatives are designed to provide therapeutic benefits and cultural enrichment fostering a profound sense of well-being and personal growth. This innovative approach aligns with GHIF's commitment to creating well-rounded individuals who can contribute positively to society. By incorporating participant feedback into the evaluation process GHIF ensures that its wellness travel programs remain relevant and responsive to the needs of its participants thereby enhancing their overall effectiveness.

These guiding evaluation questions inform GHIF's activities by emphasizing the importance of accessibility psychological well-being healthcare partnerships and participant feedback. Addressing these areas allows GHIF

to refine its strategies enhance the effectiveness of its programs and better communicate its impact to stakeholders. This comprehensive evaluation approach ensures that GHIF's initiatives are effective in achieving their intended outcomes and continuously improved to meet the evolving needs of the communities they serve.

Data Collection Tools

To effectively gather data for formative and summative evaluations the Global Health Improvement Foundation (GHIF) will employ a comprehensive suite of data collection tools designed to capture quantitative and qualitative data providing a holistic view of program performance and impact. Surveys and questionnaires will be essential for collecting quantitative data on participant satisfaction outcome achievement and the overall impact of services provided. These instruments will be administered in paper-based and electronic formats utilizing platforms such as SurveyMonkey Google Forms and Qualtrics. These tools offer robust analytics features enabling real-time data visualization and reporting crucial for timely and informed decision-making (Dillman et al. 2014).

In addition to surveys interviews and focus groups will be conducted to gather qualitative data through structured interactions with participants stakeholders and program staff. These methods provide deeper insights into the experiences and effects of program activities. Semi-structured interviews and focus groups will be facilitated in person over the phone or via video conferencing platforms like Zoom and Microsoft Teams allowing for flexibility and broader participation. Trained interviewers will use standardized guides to ensure consistency while enabling in-depth exploration of specific topics. The qualitative data collected will be analyzed using software such as NVivo and ATLAS.ti which support the coding and thematic analysis of interview transcripts and focus group discussions thereby identifying patterns and trends within the qualitative data (Creswell & Poth 2018).

Regular collection of program monitoring data will also play an integral role in informing both formative and summative evaluations. This data will be captured through attendance sheets registration logs and digital tracking systems and include the number of workshops held healthcare screenings conducted and participation rates in educational programs. GHIF will implement management information systems (MIS) such as Salesforce and DHIS2 to record and manage this data. These systems offer features like automated data entry and real-time updates enhancing data accuracy and accessibility. Integrating such technology ensures a seamless flow of information and supports comprehensive program monitoring (Wang & Strong 1996).

GHIF will leverage cloud-based platforms and mobile applications that enable remote data entry and real-time synchronization to ensure seamless integration of various data collection tools. These technologies will allow field staff to enter data directly into the system using tablets or smartphones reducing the risk of data loss and errors associated with manual data entry. Moreover GHIF is committed to maintaining the highest data security and privacy standards. All data collection tools and systems will comply with relevant data protection regulations such as the General Data Protection Regulation (GDPR) and the Health Insurance Portability and Accountability Act (HIPAA). Measures will include encryption secure data storage and restricted access to sensitive information with regular audits and staff training ensuring ongoing compliance and the safeguarding of participant data (McCallister et al. 2010).

By employing diverse data collection tools and integrating advanced technology and software GHIF will gather comprehensive data to inform both formative and summative evaluations. This approach enables the foundation to assess and enhance its programs' effectiveness continually ultimately driving improved health outcomes and service delivery. The integration of qualitative and quantitative

methodologies supported by state-of-the-art software ensures that GHIF's evaluation processes are both thorough and precise reflecting a commitment to excellence in program evaluation and improvement (Creswell & Creswell 2018).

Theory of Change

The Global Happiness Initiative Foundation (GHIF) is driven by a vision where individual happiness is the cornerstone of societal harmony. This vision recognizes that personal well-being is not merely an individual concern but a critical societal asset. Our Theory of Change articulates a systematic pathway to achieve this vision by enhancing access to healthcare education and cultural experiences. This comprehensive approach ensures that our initiatives contribute meaningfully to long-term societal well-being.

The foundation of GHIF's Theory of Change begins with identifying the desired long-term impact: a healthier more resilient and interconnected global society. To achieve this our model delineates a series of early and intermediate outcomes that are essential for realizing the ultimate goal. These outcomes include improved access to healthcare services increased educational attainment and enhanced cultural understanding through travel. Each of these outcomes is interconnected forming a pathway that underscores the holistic nature of our approach.

Healthcare access is paramount to our strategy. By partnering with local healthcare providers and governments GHIF ensures that essential medical and mental health services are available to underserved communities. Specific activities include organizing mobile health clinics providing mental health counseling and conducting preventive health workshops. Studies have demonstrated that improved access to healthcare services leads to better health outcomes and increased longevity (Gu et al. 2009). Our initiatives therefore focus on preventive care and mental health services which are critical for building a healthy society. This strategic focus addresses immediate health needs and contributes to long-term societal well-being by reducing healthcare disparities. Measurement indicators include the number of individuals served health outcomes such as reduced incidence of chronic diseases and patient satisfaction levels.

Education is the second pillar of our Theory of Change. GHIF aims to expand educational opportunities by implementing programs that address local educational gaps and promote holistic learning experiences. Activities include setting up after-school programs providing scholarships for higher education and offering vocational training. Educational attainment has been shown to improve psychological well-being and enhance social support networks (Ross & Van Willigen 1997). Our educational programs are designed to equip individuals with the skills necessary for personal development and societal contribution. By fostering a culture of continuous learning GHIF ensures that individuals are prepared to navigate and contribute to a rapidly changing world. Progress will be measured by the number of students enrolled graduation rates and improvements in literacy and employment rates.

The third pillar of our Theory of Change is cultural immersion through travel. GHIF's wellness travel model integrates health-promoting activities with cultural experiences allowing participants to gain new perspectives and improve their mental and physical well-being. Specific initiatives include guided meditation retreats wellness workshops and cultural exchange programs. Research indicates that wellness programs embedded in travel experiences can significantly reduce stress and enhance mental health (Young et al. 2020). By facilitating these enriching experiences GHIF promotes a more connected and empathetic global community essential for fostering societal harmony. Success indicators include participant feedback on their mental well-being the number of travel experiences conducted and repeat engagement rates.

GHIF's Theory of Change is a comprehensive framework integrating

healthcare education and cultural experiences to enhance individual and societal well-being. GHIF sets the stage for long-term societal transformation by systematically addressing these areas. Our theory of change outlines the steps necessary to achieve our goals and provides a clear roadmap for measuring progress and making necessary adjustments. As such GHIF remains committed to creating a happier healthier and more interconnected world.

Logic Model for GHIF Programs

The Global Health Improvement Foundation (GHIF) programs are underpinned by a detailed logic model encompassing several essential inputs and resources. Central to these inputs is the securement of funding through various channels including grants donations and in-kind support from corporate sponsors and individual donors. Such funding is crucial for covering operational costs program development and service delivery. Adequate funding ensures that resources are appropriately allocated to meet the needs of the target population as emphasized by Serrat (2017) who notes that sustained financial support is vital for the continuity and effectiveness of program activities.

Equally important are the human resources that drive GHIF's programs. This team of trained professionals including program managers health professionals educators and support staff brings a wealth of expertise and commitment vital to successful program implementation and management. The quality and capability of these human resources directly influence the effectiveness of program activities. Frumkin (2005) underscores the critical role of skilled and dedicated personnel in achieving program goals and delivering high-quality services.

Furthermore GHIF leverages strategic partnerships to enhance its capacity to deliver comprehensive services. Collaborations with healthcare providers educational institutions governmental agencies and community organizations are integral to the foundation's strategy. These partnerships enable GHIF to expand its reach and impact by leveraging external expertise and resources. Kilgo et al. (2015) highlight the importance of such strategic alliances in broadening the scope and effectiveness of educational and health programs.

GHIF's detailed logic model integrates funding human resources and strategic partnerships to create a robust framework for program delivery. These components work synergistically to ensure that GHIF can effectively meet its objectives and make a significant impact on the health and well-being of the communities it serves. By securing adequate funding harnessing the expertise of dedicated professionals and forming strategic partnerships GHIF is well-positioned to deliver on its mission and drive meaningful change.

The activities undertaken by GHIF to achieve its goals are diverse and targeted. Health workshops focus on mental health preventative care and healthy lifestyles in various communities aiming to educate participants on essential health topics and promote behaviors that enhance well-being. According to Young et al. (2022) educational workshops can significantly improve mental health and overall quality of life. Educational programs emphasize personal development professional skills and wellness practices empowering individuals to improve their life circumstances and contribute positively to their communities (Ross & Van Willigen 1997). Organized wellness travel experiences integrate health-promoting activities with cultural immersion providing participants with opportunities to relax rejuvenate and gain new perspectives thereby enhancing their mental and physical well-being (Hayes et al. 2011). Community engagement initiatives involve events and forums that encourage feedback and active participation in program services which is crucial for tailoring services to local needs and ensuring sustainable impact (Mattessich & Rausch 2014).

The outputs of GHIF's programs are the immediate tangible results of its activities. The number of workshops held is a quantitative measure of GHIF's outreach efforts tracking

the total sessions conducted in health education and wellness (Hayes et al. 2011). The number of participants served reflects the program's reach and engagement with the target population (Young et al. 2022). The quantity of educational materials distributed indicates the program's efforts to disseminate knowledge and resources (Ross & Van Willigen 1997). The number of health assessments performed measures the direct health services delivered to participants (Cunningham et al. 1998). The number of collaborative initiatives with other organizations and stakeholders highlights GHIF's efforts to build and maintain strategic partnerships (Kilgo et al. 2015).

The outcomes represent the changes or benefits resulting from the program activities. Improved health metrics are evidenced by reduced health issues and overall wellness among participants as measured by pre- and post-assessment data. Improved health metrics indicate the effectiveness of health workshops and services provided by GHIF (Gu et al. 2009). Increased knowledge tracked through surveys and tests enhances participants' understanding of health and wellness topics empowering individuals to make informed decisions about their well-being (Ross & Wu 1995). Enhanced community well-being measured by community surveys assessing changes in local health and educational outcomes indicates the broader impact of GHIF's programs (Randall et al. 2023). Strengthened partnerships evaluated through regular reviews and stakeholder feedback are essential for sustaining program activities and expanding their reach (Ovseiko et al. 2014).

The long-term impacts of GHIF's programs reflect the foundation's overarching mission. Societal happiness influenced by improved individual health and community engagement is the ultimate goal reflecting the cumulative effects of the foundation's initiatives (Serrat 2017). Cultural integration resulting from increased appreciation and understanding of different cultures through educational and travel experiences contributes to social cohesion and mutual respect enhancing the quality of life and promoting global understanding (Young et al. 2022). Sustainable health practices marked by the long-term adoption of healthy behaviors within communities lead to decreased healthcare costs and improved quality of life. Sustainable health practices are a critical impact of GHIF's health programs ensuring lasting benefits for participants (Cunningham et al. 1998).

Budget

The Global Happiness Initiative Foundation (GHIF) requires a comprehensive budget and budget justification to effectively implement its programs to enhance healthcare access educational opportunities and cultural immersion. The budget must align with the organization's vision and strategic goals ensuring transparency and efficient use of funds.

The proposed budget for GHIF encompasses key areas essential for achieving our mission: healthcare services educational programs wellness travel experiences administrative costs and evaluation. Each line item is meticulously calculated to ensure that resources are allocated effectively promoting both immediate impact and long-term sustainability.

Budget for Global Happiness Initiative Foundation (GHIF)

Category	Description	Itemized Cost (USD)	Total Cost (USD)
Healthcare Services		\$1000000	
Mobile Clinics		\$400000	
Mental Health Counseling		\$350000	
Preventive Health Workshops		\$250000	
Educational Programs		\$750000	
After-School Programs		\$300000	
Scholarships		\$250000	
Vocational Training		\$200000	
Wellness Travel Model		\$500000	
Guided Meditation Retreats		\$200000	
Wellness Workshops		\$150000	
Cultural Exchange			

Programs\t\n\$150000\t\n\n\t\nAdministrative Costs\t\n\t\n\t\n\t\n\$450000\n\t\n\t\n\t\nStaff Salaries\t\n\$300000\t\n\n\t\n\t\n\t\nOffice Supplies\t\n\$50000\t\n\n\t\n\t\n\t\nOperational Costs\t\n\$100000\t\n\n\t\n\t\n\t\nMonitoring and Evaluation\t\n\t\n\t\n\t\n\$300000\n\t\n\t\n\t\nData Collection Tools\t\n\$100000\t\n\n\t\n\t\n\t\n\t\nEvaluation Consultants\t\n\$150000\t\n\n\t\n\t\n\t\n\t\nReporting\t\n\$50000\t\n\n\t\n\t\n\t\nTotal\t\n\t\n\t\n\t\n\$300 0000\n\nBudget Justification\nHealthcare Services are critical for addressing underserved communities' immediate and preventive health needs. This allocation includes organizing mobile health clinics providing mental health counseling and conducting preventive health workshops. Mobile clinics will reach remote areas ensuring essential medical services are accessible to all. Mental health counseling will support individuals in managing psychological well-being while preventive health workshops will educate communities on maintaining healthy lifestyles. Studies have shown that improved access to healthcare services leads to better health outcomes and increased longevity (Gu et al. 2009).\nEducational Programs aim to fill educational gaps and promote continuous learning. This budget supports after-school programs providing supplementary education scholarships to facilitate higher education for disadvantaged youth and vocational training to equip individuals with practical skills for employment. Educational attainment enhances psychological well-being and social support networks making this investment crucial for both individual and societal development (Ross & Van Willigen 1997). These programs are designed to reach over 10000 individuals in the first year significantly impacting community education levels.\nThe Wellness Travel Model integrates health-promoting activities with cultural experiences. This allocation covers guided meditation retreats wellness workshops and cultural exchange programs. These initiatives offer participants opportunities to gain new perspectives and improve their mental and physical well-being. Wellness programs embedded in travel experiences can significantly reduce stress and enhance mental health (Young et al. 2020). This model will initially serve 1000 participants promoting a connected and empathetic global community.\nAdministrative Costs cover essential expenses such as staff salaries office supplies and operational costs necessary for the smooth functioning of GHIF. This includes hiring experienced professionals to manage programs coordinate with partners and ensure compliance with local regulations. Effective administration is crucial for maintaining operational integrity and achieving the foundation\u2019s goals. These costs ensure the foundation can operate efficiently and effectively supporting all programmatic activities.\nMonitoring and Evaluation are vital for assessing the impact of GHIF\u2019s initiatives and making data-driven improvements. This budget item includes procuring data collection tools hiring evaluation consultants and producing detailed reports. Regular evaluation ensures that programs are aligned with GHIF's objectives and deliver measurable outcomes. This continuous feedback loop is essential for refining and improving the foundation's efforts (Serrat 2017).\nWithin GHIF the \$3 million budget is a solid foundation for realizing the organization's ambitious vision and wide-reaching objectives. This comprehensive budget underpins every facet of GHIF\u2019s mission encompassing healthcare education cultural integration and operational infrastructure. With this grant secured GHIF can confidently pursue its goal of fostering a more resilient interconnected and healthier global community poised to impact global well-being significantly.\nReferences\nAnderson A. A. (2006). The community builder\u2019s approach to theory of change. A Practical Guide to Theory Development. The Aspen Institute Roundtable on Community Change. Url: [Http://www. Dochas.](http://www.dochas.org)

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This includes donor identification and segmentation, relationship management, communication strategies, event planning, and performance measurement. To plan effectively for these elements:

1. **Donor Identification and Segmentation**: Start by analyzing your potential donor base to understand their interests, giving capacities, and motivations. This involves collecting data through surveys, interviews, and research, which can then be used to segment donors into groups for targeted strategies.
2. **Relationship Management**: Develop a system to manage relationships with each donor segment effectively. This includes regular updates, personalized communications, and opportunities for donors to engage with the cause they are supporting. Implementing a donor management system or CRM software can help track interactions, preferences, and donations to maintain and deepen relationships over time.
3. **Communication Strategies**: Craft communication plans that resonate with different donor segments. This might involve varied messaging that appeals to the specific values and interests of each group, ensuring that communications are both informative and emotive.
4. **Event Planning**: Organize fundraising events that align with the interests of your target donor groups and provide real value to participants. Planning should start well in advance and include considerations for venue, logistics, programming, and how the event will provide an engaging donor experience.
5. **Performance Measurement**: Set clear metrics for fundraising activities to evaluate their effectiveness. This involves not only tracking financial outcomes but also assessing donor engagement levels and overall satisfaction. Regularly review these metrics to refine strategies and improve future fundraising efforts.

Each of these strategic elements is crucial for building and maintaining relationships with donors, which is central to sustainable fundraising success. Your methodical approach to planning and implementing these strategies will ensure that your fundraising efforts are both effective and aligned with the broader goals of promoting human rights and dignity.]

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aligned with my ideals about human rights and dignity. However, I believe it's best for humanity to move away from capitalist systems that involve the concept of money or currency.

I am also the author of the attachments DQ4 and GW Assignment 2. Based on this knowledge, please answer parts A-C above in a short narrative essay format. Each paragraph should consist of a minimum of 3 sentences, and each part should not exceed four paragraphs. I aim to provide about 2-3 paragraphs for each part. Answers should be fully informed by the attachments (especially the ones referenced in the reference list below) and cite them in your answers using APA 7 style in-text citations and signal phrases.

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selecting and managing their involvements to generate the highest social return on investment. This approach involves leveraging their resources to strengthen high-performing organizations stimulate innovation and drive systemic changes that tackle the root causes of societal problems.

Part B: Describe the differences between development and fundraising and how they relate to one another. Then describe how you will enact development plans that will positively contribute to your fundraising.

While the terms development and fundraising are often used interchangeably they have distinct roles within an organization. Fundraising primarily involves collecting monetary support usually focusing on immediate financial targets and often driven by specific events or campaigns. On the other hand development encompasses a broader scope. It includes fundraising but extends to nurturing long-term relationships with donors strategic resource planning and fostering a philanthropic culture within and around the organization (Frumkin 2005).

The strategic nature of development plans is a crucial element in enhancing fundraising efforts. These plans are not solely focused on acquiring funds but on retaining and engaging donors over the long term. They involve understanding donors' motivations aligning these motivations with the organization's goals and creating meaningful engagement opportunities. This approach not only secures immediate financial support but also establishes a base of loyal supporters who are committed to the organization's mission in the long run (Frumkin 2005).

At the Global Happiness Initiative Foundation I would implement these concepts in a variety of impactful ways. First I would foster community engagement ensuring that development activities deeply resonate with community needs and values. Second I would prioritize transparency providing clear information on how funds are used to strengthen trust and deepen donor relationships. Lastly I would diversify funding sources by exploring revenue streams beyond traditional donations such as social enterprises or membership programs enhancing financial stability and ensuring alignment with the organization's mission. These strategies when implemented collectively would significantly boost fundraising efforts and align them with the broader goal of fostering a more equitable and joyful society.

Part C: David Rubenstein discusses how anyone can be a philanthropist. He used his wealth to do patriotic philanthropy to purchase rare documents for public consumption and fix historic buildings so Americans can learn more about their history. David reminds the listeners that although he has spent large sums of money on philanthropy you don't need to spend money to be a great philanthropist. Describe how you have been or will be a great philanthropist.

As the conceptual founder of the Global Happiness Initiative Foundation (GHIF) I am deeply inspired by the idea that effective philanthropy does not require vast wealth. This is reflected in David Rubenstein's (2015) notion of "patriotic philanthropy" where he uses his resources to enhance public knowledge and national pride by preserving historical documents and monuments. Though GHIF is currently just a vision it embodies my commitment to using available resources be it time expertise or networks to foster societal improvement. My vision for GHIF includes initiatives that go beyond financial aid aiming to address essential human needs such as healthcare mental wellness education and enriching travel experiences that broaden perspectives and promote understanding. Research indicates that corporate philanthropy can significantly impact societal causes even when it involves non-monetary contributions such as volunteer work and expertise (Van der Heyden & Van der Rijt 2004).

From my perspective philanthropy is about actively contributing to the betterment of society and creating opportunities that

allow individuals to thrive. Studies have shown that corporate philanthropy can enhance both social and economic outcomes benefiting communities and improving corporate reputation and performance (Navickas & Kontautien\0117 2011). I believe that true philanthropic wealth is measured not by personal gain but by the impact we have on the lives of others. As GHIF takes shape it will strive to turn these principles into action aiming to make a significant and positive difference in the world.\n\n\nDavid Rubenstein (Director). (2015 July 14). Everyone can be a philanthropist | David Rubenstein | TEDxPennsylvaniaAvenue.
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understand basic concepts about money as early as age 3, and by 7, their values around money are already set. Our early experiences with money, such as witnessing arguments about it or being defined by it, can trigger a range of emotions such as anxiety, resentment or feelings of elitism that we carry through life. Those experiences and emotions shape our values and relationship with money. Based on our values, money can make us feel secure as we provide for ourselves and others we care for. Our joy may come from the sacrifices we make with money. Money can also make us feel insecure if we do not have the things we want. We can view it negatively, as it may encourage envy and corruption. It can also position us to be overly socially competitive by attempting to

\u201cKeep\u201d with the Joneses. \u201dWe can be led to believe money is the source of increased happiness. However, a 2018 study by researchers at Purdue University showed that individuals with an annual income of \$95,000 reported the greatest level of overall life satisfaction.

The <https://www.thestreet.com/story/14475875/1/is-your-spouse-cheating-on-you-with-money.html> [https://www.marketwatch.com/story/this-common-behavior-is-the-no-1-predictor-of-whether-youll-get-divorced-2018-01-](https://www.marketwatch.com/story/this-common-behavior-is-the-no-1-predictor-of-whether-youll-get-divorced-2018-01-10)

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[https://www.cbsnews.com/news/the-biggest-cause-of-stress-in-america-](https://www.cbsnews.com/news/the-biggest-cause-of-stress-in-america-today/)

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[http://money.com/money/5157625/ideal-](http://money.com/money/5157625/ideal-income-study/)

[income-study/](http://money.com/money/5157625/ideal-income-study/) study also found that additional income did not create

a disproportionate level of happiness beyond this point. Many baby boomers are contemplating life transitions, such as retirement, succession planning and wealth transfer. As they consider transferring their wealth, they are questioning their beneficiaries' relationships with money and what will become of their nest egg. Take, for instance, the story of a family I know. Nathan and his wife, Ann, have been married 30 years. Over the years, they have debated when they should tell their daughter, Morgan, about their wealth. The couple was concerned that learning about their wealth could limit Morgan's ambition. Now that Morgan has established her career, Nathan and Ann are more comfortable discussing their nestate. However, they cannot assume their daughter's values related to money are the same as theirs. Nathan is from a family that experienced financial hardship his daughter wasn't fully aware of growing up. However, Ann grew up middle class and had less fear of losing assets or being financially insecure. After much agony, the couple had the talk with their daughter. Nathan said the discussion went well and allowed him and his wife to share their experiences related to money growing up. Morgan left the meeting understanding why her parents took various approaches to spending and building wealth, as well as how their legacy should continue. The conversation also inspired her husband to have a conversation with his parents. If you haven't done so, take time to think about your relationship with money and how it was formed. Also, confirm that your children have a positive relationship with it. Key questions you should ask yourself include:

\u2022 Where do my money values come from?

\u2022 Does money make me feel confident or insecure?

\u2022 Do I have a history of making good financial decisions, and if not, why?

\u2022 Am I hesitant to take action when there are issues regarding money?

\u2022 Am I impulsive with money, or do I have the discipline to say no?

\u2022 Do my children have good values with money, especially if they will inherit it from me?

If

thinking about these questions makes you feel uncomfortable,\n\nyou might not have a good relationship with money. If you do not\n\nhave a healthy relationship with it, consider consulting with a\n\nfinancial advisor to develop a strategy to correct the financial path\n\nfor you and your family. Financial health contributes to overall\n\nhealth and a better quality of life.\n\nThe information provided here is not investment, tax or financial\n\nadvice. You should consult with a licensed professional for advice\n\nconcerning your specific situation.\n\nForbes Finance Council is an invitation-only organization for\n\nexecutives in successful accounting, financial planning and wealth\n\nmanagement firms. Do I qualify?\n\nhttp://www.forbesfinancecouncil.com/qualify/?source=forbes-text\n\nhttp://www.forbesfinancecouncil.com/qualify/?source=forbes-text\n\nGregg Lunceford, Ph.D., CFP\n\nDr. Lunceford is Managing Director and Wealth Advisor at Mesirow. Read\n\nGregg Lunceford's full executive profile here.\n\nEditorial Standards Reprints & Permissions\n\nhttps://www.forbes.com/sites/forbesfinancecouncil/people/gregglunceford/\n\nhttps://www.mesirow.com/capabilities/wealth-management\n\nhttps://profiles.forbes.com/u/e3401c29-e8fe-4962-97a3-9259919dbf5f\n\nhttps://www.forbes.com/sites/forbesfinancecouncil/people/gregglunceford/\n\nhttps://www.forbes.com/sites/forbesstaff/article/forbes-editorial-values-and-standards\n\nhttps://www.parsintl.com/publication/forbes/\n\n", "title": "What Is Your Relationship With Money_.pdf", "tether_id": null}, "status": "finished_successfully", "end_turn": null, "weight": 1.0, "metadata": {"command": "context_stuff", "is_visually_hidden_from_conversation": true, "message_type": null, "model_slug": "gpt-4", "default_model_slug": "gpt-4", "parent_id": "bf73d12a-e66b-4645-a3a0-76f71bd2c72f", "request_id": "8936b9520a0f5a0d-MXP", "timestamp": "absolute"}, "recipient": "all", "channel": null}, "parent": "bf73d12a-e66b-4645-a3a0-76f71bd2c72f", "children": [{"id": "07603a14-6a4d-47a4-bd81-1925f6eea595"}], "07603a14-6a4d-47a4-bd81-1925f6eea595": {"id": "07603a14-6a4d-47a4-bd81-1925f6eea595", "message": {"id": "07603a14-6a4d-47a4-bd81-1925f6eea595", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1718330421.687141, "update_time": null, "content": {"content_type": "tether_quote", "url": "file-LrYVACbER15fXnHdW60sTVX2", "domain": "tactiq-free-transcript-SUvoBzjZv7E.txt", "text": "# tactiq.io free youtube transcript\n# How to be a better fundraiser | Kara Logan Berlin | TEDxSantaClaraUniversity\n\nhttps://www.youtube.com/watch/SUvoBzjZv7E\n\n00:00:00.410 [Music]\n\n00:00:15.260 I'm here today to talk about fundraising\n\n00:00:18.050 or as you probably think of it the other\n\n00:00:20.550 F word because if you want to change the\n\n00:00:24.210 world you have to know how to pay for it\n\n00:00:25.710 I'm not talking about being a good\n\n00:00:27.570 person you can do that for free I'm\n\n00:00:29.599 talking about if you want to create\n\n00:00:31.619 something start something galvanize a\n\n00:00:34.649 community\n\n00:00:35.520 improve the lives of others run for\n\n00:00:37.050 office every day great ideas die on the\n\n00:00:40.440 vine because they don't have capital to\n\n00:00:41.910 get off the ground and all of the work\n\n00:00:44.100 the thought the vision that goes into\n\n00:00:46.350 the idea isn't worth much if you can't\n\n00:00:48.450 pay your bills and while most of the\n\n00:00:50.760 greatest social movements in history\n\n00:00:52.170 were powered purely by an idea and\n\n00:00:55.050 people's belief in that idea real change\n\n00:00:57.930 in impact require resources real people\n\n00:01:02.520 do this work they need real change real\n\n00:01:05.880 impact and resources to actually make

it\n00:01:08.670 happen the people that believe in this\n00:01:10.830 work have to have the support and the\n00:01:12.840 resources to do it that's where I come\n00:01:15.930 in I get essential resources into the\n00:01:18.150 hands of people and visionaries on the\n00:01:20.430 front lines doing work that matters we\n00:01:23.400 spend the majority of our waking hours\n00:01:24.990 working we spend more time working than\n00:01:27.210 we do with our loved ones so I decided\n00:01:29.490 early on that I have to love my work and\n00:01:31.259 it has to add value and while I would\n00:01:34.530 love to be one of these people who\n00:01:36.240 spearheads you know social change from\n00:01:39.000 the ground up and the thing I realized\n00:01:41.220 early on in my nonprofit career is that\n00:01:43.619 the thing I'm good at the thing I'm\n00:01:45.570 really good at is raising money and I\n00:01:49.140 love it I think it is a privilege to\n00:01:51.570 work alongside bold ambitious optimistic\n00:01:55.049 leaders and the organizations they serve\n00:01:56.869 so I teach people how to do the thing\n00:01:59.369 I'm good at because the more people that\n00:02:01.469 learn how to be good at my end of this\n00:02:03.240 work the more work will get done and I\n00:02:06.119 teach everyone I teach CEOs and\n00:02:09.209 presidents and boards of directors and\n00:02:12.020 Didi's I teach development directors and\n00:02:15.110 all sorts of teams and nonprofit newbies\n00:02:17.740 social change agents and candidates I\n00:02:20.510 teach anyone that wants to do something\n00:02:22.640 extraordinary how to fund their dream my\n00:02:25.490 dream is that there will be more people\n00:02:26.750 like me doing this work well and that\n00:02:29.330 development will be an undergraduate\n00:02:30.650 course at universities so that\n00:02:32.330 fundraising animals like me will find\n00:02:35.510 this job out of the gate instead of\n00:02:37.070 discovering it years later accidentally\n00:02:38.960 I even have the curriculum developed but\n00:02:41.210 short of overhauling undergraduate\n00:02:43.010 course requirements I think tonight's\n00:02:45.530 probably a good first step to get people\n00:02:47.510 to think about fundraising more as an\n00:02:50.690 opportunity and less as a dirty word if\n00:02:54.260 you want to change the world you have to\n00:02:56.240 know how to pay for it to do that well\n00:02:58.580 you have to understand three big things\n00:03:00.140 your feelings about wealth and money the\n00:03:03.860 importance of building relationships and\n00:03:05.870 how to ask for what you want let's start\n00:03:09.350 at the top your feelings about wealth\n00:03:10.820 and money what is your relationship to\n00:03:13.160 money money is complicated it makes\n00:03:16.640 everyone squeamish it makes everyone act\n00:03:18.650 kind of weird anyone who's ever had to\n00:03:20.930 split the check after dinner with\n00:03:22.400 friends can tell you this and imagine\n00:03:24.320 what it was like you know before venmo\n00:03:27.910 to help people learn how to raise money\n00:03:30.530 you have to help them understand their\n00:03:32.060 deal with money because everybody has\n00:03:33.590 baggage grow up poor baggage grow up\n00:03:36.920 rich baggage mad or envious that other\n00:03:40.160 people have more money than you baggage\n00:03:42.290 I think people with money are smarter\n00:03:44.810 than you\n00:03:45.970 baggage feel guilty that you have more\n00:03:49.970 money than other people that's some\n00:03:52.220 first-class baggage\n00:03:55.349 still baggage people it's still baggage\n00:03:57.629 so whatever your deal is with your\n00:04:00.659 baggage you have to reconcile it if\n00:04:02.129 you're gonna be able to ask for money\n00:04:03.209 and here's a little tip about asking\n00:04:05.280 people for money\n00:04:05.999 the

only difference about really wealthy\n00:04:08.340 people in us is that they have more\n00:04:10.379 money than us that's it\n00:04:12.750 don't overcomplicate it they come with\n00:04:15.569 their own baggage when you think about\n00:04:19.168 how to do this work it's important to\n00:04:21.839 remember that money makes the world go\n00:04:24.000 around you hear that all the time but\n00:04:25.320 it's true whether you're a non-profit\n00:04:26.490 for a profit or you pay your own bills\n00:04:28.729 we often feel like talking about it is\n00:04:31.380 this icky embarrassing ugly thing but\n00:04:34.139 it's just money and it's a fact of life\n00:04:36.810 so how you feel about it directly\n00:04:38.880 affects how you approach it like\n00:04:41.099 everyone else when I started out in this\n00:04:42.930 work I had to examine and understand my\n00:04:46.410 own feelings about wealth and money and\n00:04:48.210 I had to learn how to separate them from\n00:04:50.400 how I feel about raising money for\n00:04:52.110 important causes how I feel about asking\n00:04:54.900 for money to help people do good work in\n00:04:56.940 the world is not the same as how I feel\n00:04:58.949 about asking for money for myself this\n00:05:01.380 is an important distinction when I go\n00:05:04.139 and talk to someone I'm not asking them\n00:05:06.150 to pay my mortgage I'm giving them an\n00:05:08.909 opportunity to invest an idea that's\n00:05:11.460 gonna change the world for the better\n00:05:12.990 why should I feel bad about that the\n00:05:16.320 answer is that I shouldn't I wouldn't\n00:05:18.030 feel bad about giving them the inside\n00:05:19.620 tip on a hot stock and I'm not gonna\n00:05:21.870 feel bad about giving them the inside\n00:05:23.520 tip on empowering social change either\n00:05:25.440 if you want to be good at raising money\n00:05:28.139 you have to be able to reframe the ask\n00:05:30.270 both for yourself and for other people\n00:05:32.310 as an opportunity next you have to get\n00:05:36.360 prepared to build some relationships\n00:05:38.120 people give to people they don't just\n00:05:40.349 give to ideas and if they don't believe\n00:05:42.960 in the person running the place you're\n00:05:44.190 already dead in the water this is true\n00:05:46.289 whether you're in stocks or venture\n00:05:48.780 capital politics or nonprofits building\n00:05:52.889 a relationship with people takes work\n00:05:54.979 you have to care about more than just\n00:05:57.479 what you want or need you have to also\n00:05:59.490 value what someone else wants or need I\n00:06:01.590 know it's a shocking terrible idea but\n00:06:04.800 oftentimes closing gifts is\n00:06:07.010 understanding the person more\n00:06:08.820 it's important to know the product and\n00:06:10.380 if you think building a relationship\n00:06:11.910 with with people takes work building a\n00:06:14.610 relationship with someone you're asking\n00:06:16.200 for money from takes work and it takes\n00:06:19.710 homework have you done any research do\n00:06:23.160 you have any idea what they care about\n00:06:24.600 do you know why they should invest in\n00:06:26.850 your work can you answer that question\n00:06:29.040 in less than 30 seconds if you can't the\n00:06:31.140 meetings gonna be it's gonna be pretty\n00:06:32.790 rough and the answer can't be because\n00:06:34.650 they're super rich and they live in your\n00:06:36.030 zip code when you talk to people and\n00:06:40.860 understand what they care about it has\n00:06:43.170 to be in person fundraising is\n00:06:45.270 relational it's not transactional and\n00:06:47.400 you have to ask them questions when I\n00:06:50.850 sit down with the donor it goes\n00:06:52.140 something like this hi thanks so much\n00:06:55.560 for seeing me how have you been\n00:06:57.240 did you guys go anywhere fun

over\n00:06:58.410 holiday nice I love Mexico do you always\n00:07:00.750 go to the same place oh that's awesome\n00:07:02.670 are those your kids they're so cute how\n00:07:04.950 old are they where are they in school oh\n00:07:07.140 that's a great school are you guys very\n00:07:08.820 involved there your spouse is on the\n00:07:10.680 board how's that I bet it's a ton of\n00:07:12.180 work how do you guys meet oh it's Santa\n00:07:14.250 Clara that's awesome are you super\n00:07:15.870 involved in the alumni network oh that's\n00:07:17.790 so interesting where do you guys live\n00:07:19.290 again oh that's great is that your boat\n00:07:22.990 I literally go through all of these\n00:07:26.590 things right and you know why because\n00:07:27.910 guess what I know now I know they're out\n00:07:30.009 a hundred and twenty grand a year in\n00:07:31.449 schooling for the next 12 years right\n00:07:33.550 spouse is on the board of the kids\n00:07:35.410 school I know they're out 100k probably\n00:07:37.449 that's that's a six-figure they're both\n00:07:39.520 involved in their school alumni and\n00:07:40.990 that's probably 25k they told me they\n00:07:43.270 live on the Upper East Side I could look\n00:07:44.830 up their apartment online and I can find\n00:07:46.660 out what their mortgages and I know they\n00:07:48.789 own a second home in Mexico oh and they\n00:07:51.069 own a boat which is like funny money\n00:07:53.800 right so what I now understand is true\n00:07:59.139 what I now understand is their thousand\n00:08:02.229 dollar gift is probably more of a\n00:08:04.000 starter gift and I should be thinking\n00:08:06.160 about ways to to help them partner with\n00:08:09.639 us and invest in a more meaningful way I\n00:08:12.030 know this sounds a tad mercenary I'm not\n00:08:15.940 confused about how it sounds but here's\n00:08:19.360 what I want to tell you because this is\n00:08:20.680 the part that all my clients always want\n00:08:22.509 to skip because they think it's the\n00:08:23.680 fluff and it's not important if you\n00:08:26.680 don't understand what they care about\n00:08:28.150 and what they value how are you ever\n00:08:30.550 gonna be able to tell them about your\n00:08:31.900 work right I want them to fund our work\n00:08:34.510 I do but I also want them to have a\n00:08:37.089 really meaningful experience as a donor\n00:08:39.130 so that they feel like we're partners\n00:08:41.200 and not they're not an ATM right so it's\n00:08:45.550 important to ask the questions because\n00:08:47.260 the more you know about them and you\n00:08:48.940 know what they value the more you can\n00:08:50.709 steer the conversation in a direction\n00:08:52.480 about your work that will resonate for\n00:08:54.010 them and once you get past the get to\n00:08:56.020 know you part you get into the fun stuff\n00:08:58.000 like why are you philanthropic at all\n00:09:00.610 right why do you invest in new ideas do\n00:09:05.380 you want giving back to be a value you\n00:09:07.180 pass on to your children can we help you\n00:09:09.100 do that it's really awesome it's\n00:09:12.040 meaningful and remember it's a\n00:09:13.149 conversation it's not a\n00:09:14.709 cross-examination it's not an interview\n00:09:17.520 don't walk in there and tell them\n00:09:19.810 everything you already know about them\n00:09:21.130 because you did your research you don't\n00:09:22.240 get extra points for knowing how to use\n00:09:23.620 Google it's 75% them talking 25% you\n00:09:29.170 listening it's better to be a good\n00:09:30.910 listener than a good showman and once\n00:09:33.070 you understand what they care about you\n00:09:35.740 can talk to them\n00:09:36.580 what you care about right you can tell\n00:09:38.290 them about you now when you do

this\00:09:40.450 don't get too deep into the weeds or\00:09:42.820 you'll lose them it's a lot like when I\00:09:45.040 sit down with guys in finance right and\00:09:47.200 I say you know how's work I'm looking\00:09:50.800 for like a thumbs-up thumbs-down but\00:09:53.589 what I get sometimes is like a long just\00:10:00.360 description of how the markets are\00:10:02.649 trending and my brain leaves my body and\00:10:05.620 starts to think about what time I dry\00:10:07.510 cleaner closes like I don't have\00:10:10.209 capacity for that and they don't have\00:10:12.310 capacity for that level detail of our\00:10:13.990 work if they want it they'll ask you the\00:10:15.700 questions it's it's this this thing that\00:10:19.570 happens over and over because I here's\00:10:22.120 an example I worked with the CEO once\00:10:24.490 and I was hired to teach him how to talk\00:10:26.440 to human people like a human person it\00:10:30.070 was a very difficult job so he kept\00:10:33.700 getting great donor meetings and he\00:10:35.589 wasn't closing any gifts and I could not\00:10:37.899 figure out what the problem was so\00:10:39.190 finally I was like I'm just gonna come\00:10:40.630 with you it's gonna be great\00:10:41.709 so I went with him to meetings and what\00:10:44.079 would happen was he was getting into\00:10:45.490 such detail with the donors that their\00:10:47.950 eyes were glazing over and then after he\00:10:50.649 was done with his 15 minute pitch they\00:10:53.560 literally would say this happened like\00:10:55.300 three times in a row god that sounds\00:10:57.910 great congratulations keep up the good\00:11:00.790 work and that was the meeting which was\00:11:02.620 obviously not the outcome we were\00:11:03.850 looking for so he couldn't understand\00:11:06.370 what I was trying to say to him that I\00:11:07.570 finally like in an act of sheer\00:11:09.100 desperation was like you know what I\00:11:13.029 love I love NASA\00:11:15.970 I love NASA I think it is unbelievably\00:11:20.649 amazing we have figured out how to get a\00:11:22.510 person to the moon I think it's awesome\00:11:25.180 I think the idea of getting someone to\00:11:28.510 the moon and they walk on the moon and\00:11:30.149 god I love rocket ships I love rocket\00:11:33.370 ships rocket ships are amazing but if\00:11:35.769 you start to tell me about the rocket\00:11:37.360 ship and how it gets to the moon and the\00:11:39.430 math and the science equations on how\00:11:41.500 the rocket ship gets to the moon I\00:11:43.199 promise you I will hang myself with my\00:11:45.699 own hair\00:11:47.630 I was like that is not how you tell\00:11:50.720 people about your work what is the need\00:11:53.470 like what's the point right how do you\00:11:56.329 address the need why are you better at\00:11:58.130 it than anybody else and what can they\00:12:00.139 do to be what can you do to make it\00:12:02.269 about them right how can they help you\00:12:05.329 get to the moon that's the good stuff if\00:12:08.990 you're able to do that you're probably\00:12:10.190 ready to make the ask now I don't expect\00:12:13.190 everyone to be super excited to ask\00:12:15.170 people for money\00:12:15.980 that's why development is an actual\00:12:17.899 profession and not an awkward hobby\00:12:20.889 naturally great fundraisers love people\00:12:24.350 they can and will talk to anyone they\00:12:27.259 can find common ground with anyone\00:12:29.060 they're your friends that talk to people\00:12:30.709 in the elevator or at the grocery store\00:12:33.730 they believe in the work required to\00:12:37.610 both build relationships and keep them\00:12:39.680 and they naturally have a high tolerance\00:12:43.759 for rejection but I don't

expect everyone to be a natural and you don't have to be a natural to raise money you just have to respect the people in the process and do the work will you reconcile your baggage will you commit to build relationships if you will you're ready to make the ask and the ask is oftentimes as simple as using the phrase would you consider becoming a monthly donor would you consider increasing your support to \$100 would you consider investing in our work at the \$1,000,000 level would you consider does a couple of awesome things one it gives the donor and easy way to opt out like they can say no without it being yes now and to gives you a second ask well what would you consider it's good right when you do this remember you're not asking for yourself you're asking on behalf of all of the people you serve or are touched by your genius this isn't a personal favor right feel proud of the ask it's incredible that you do this work don't try to be someone you're not you're gonna go to these meetings and think you need to be bigshot it be yourself authenticity matters nobody likes a phony just be yourself and please please don't Harvey do your own ask what I mean by this is don't walk into the meeting and say I had an IDI that did this all the time I stopped inviting him he'd say we're not here today to ask you for money yes we are that's exactly why we're here today don't do that don't say whatever you can do to help that is hands down the fastest way to get the smallest possible gift someone thinks they can give you and get away with not kidding and don't take it back once you've made the ask would you consider supporting us at the \$10,000 level or the five or the two or one you know what take the year off you're the best thanks don't do that ask the question wait till ten count to ten before you speak again keep your face like this they are grown-ups they have all the power in this situation they can answer the question don't take it back which brings me to my favorite don't ask don't get if you don't make an actual ask no one will give you actual money and if no one gives you actual and money you actually can't do anything with it it's very simple don't ask don't get listen I would love to live in a world or we didn't have to ask people for money to do important work that will change people's lives I would love to not have to teach people how to make a case for the importance of feeding and housing and educating people but this is the world that we live in and if we're committed to doing this work and doing it well we have to be as committed to the art of funding this work as we are to the art of executing it I'm going to repeat that because I think it's really important we have to be as committed to the art of funding our work