

thoughtful\n00:02:12.050 donors these are major donors and then\n00:02:14.209 of course the most thoughtful gift is\n00:02:15.410 where we say to somebody could you think\n00:02:17.150 about us when you're not here could you\n00:02:19.070 include us in your will but that's a\n00:02:21.260 process and each layer has to be\n00:02:23.150 observed and people tend to try to move\n00:02:24.800 to the to the bigger layers or\n00:02:26.840 alternatively they tend to not not move\n00:02:29.870 they tend to leave everybody at their\n00:02:31.190 same giving level and either those as a\n00:02:33.709 mistake\n00:02:37.860 why things we really want to make sure\n00:02:39.870 that we do as we build relationships\n00:02:41.330 okay you can imagine their strategies\n00:02:44.070 that work better for some parts of the\n00:02:46.170 relationship than others so direct mail\n00:02:47.730 is a great acquisition strategy it gets\n00:02:49.740 a lot of people to go from zero to one\n00:02:51.270 we don't really have time unless we're a\n00:02:53.490 tiny organization to go and see\n00:02:55.080 everybody and talk to them in person in\n00:02:56.610 order to acquire them as donors so we\n00:02:58.530 try to bring in as many as we can and\n00:03:00.330 then we start working with them but some\n00:03:02.700 strategies are good for some things and\n00:03:04.080 some for others and it's very important\n00:03:05.940 to say what are we trying to do are we\n00:03:07.080 trying to acquire are we trying to build\n00:03:09.150 community and we're trying to thank\n00:03:10.470 people are we trying to get visibility\n00:03:12.780 what are we trying to do with our\n00:03:14.400 fundraising when you want to get money\n00:03:16.740 which is what most people say I want to\n00:03:18.120 get money I don't care about anything\n00:03:19.140 else then the strategy you want to use\n00:03:21.209 is personal face-to-face solicitation\n00:03:22.790 when you go to somebody who gives away\n00:03:25.530 money cares about your cause how do you\n00:03:27.330 know that because you know them and you\n00:03:29.130 ask them in person for money and that's\n00:03:31.380 the best strategy and then all the other\n00:03:32.850 strategies come down from there the\n00:03:35.040 personal phone call personal letter then\n00:03:37.650 the impersonal strategy say a phonathon\n00:03:39.330 a direct mail appeal but a phonathon is\n00:03:42.360 a very good acquisition strategy and\n00:03:43.860 direct mail appeals and acquisition\n00:03:45.090 strategy each strategy is good for some\n00:03:46.980 things and I think the key element in\n00:03:48.630 here is really to tell board members\n00:03:50.400 what can they expect when they engage in\n00:03:52.200 a strategy you have very smart board\n00:03:54.269 members they're used to getting like\n00:03:55.200 straight As are used to getting 95% on\n00:03:57.150 their tests and then then they go out\n00:03:59.040 and they ask all their friends for money\n00:04:00.120 and only half their friends give money\n00:04:01.500 and they think oh my god you know\n00:04:02.850 they're just devastated but in fact if\n00:04:04.470 we tell them you know what under the\n00:04:05.730 best of all possible worlds only half\n00:04:07.560 the people are going to give you the\n00:04:08.700 money you asked for then they're fine\n00:04:10.350 with that you sent out a hundred letters\n00:04:12.300 at the best of all possible worlds one\n00:04:13.980 person is going to respond to you that's\n00:04:15.269 1% that's the direct mail respond\n00:04:17.310 Wow is that right yeah because\n00:04:18.810 fundraising is strictly volunteer business\n00:04:25.120 so then the final principle we imagined\n00:04:27.430 the whole thing of the principles of the\n00:04:28.990 case is the foundation relationships one\n00:04:31.690 side strategies and other side kind of\n00:04:33.820 relationship

between the relationship\n00:04:35.169 building where we are in the\n00:04:36.250 relationship in the strategy then the\n00:04:37.510 roof of the whole thing is the principle\n00:04:39.130 of diversity which says we have to have\n00:04:40.990 our money coming from as many sources as\n00:04:42.790 we can manage and in order for that to\n00:04:45.940 happen and I speak very slowly now in\n00:04:48.250 order for that to happen we have to have\n00:04:49.810 as many people as we can possibly manage\n00:04:51.760 helping to raise that money and that\n00:04:53.770 group of people has to be led by the\n00:04:55.840 board of directors there can be other\n00:04:57.669 people who help but the board has to set\n00:04:59.950 the pace with that\n", "extra": {"cited_message_idx": 13, "search_result_idx": null, "evidence_text": "source", "cloud_doc_url": null}}}, {"start_ix": 2418, "end_ix": 2429, "citation_format_type": "tether_og", "metadata": {"type": "file", "name": "interview_nigel_harris_february_2017.pdf", "id": "file-faSFT4gDC8RosjpXC6QoWh52", "source": "my_files", "text": "\nInterview Nigel Harris\n\nDriving the case for a sustainable long-\nnterm approach to fundraising\n\nZilla Efrat speaks with Nigel Harris about longevity of relationships, relationship \nprogression and the life-time value of donors.\n\nIf boards just focus on \nthe revenue aspects of \nfundraising alone, they \nare missing a fundamental \nunderstanding of what \nfundraising is about and \nwhat drives it. \nThat\u2019s the view of Nigel Harris, CEO of \nthe Mater Foundation and chair of the \nFundraising Institute of Australia, who \nbelieves it\u2019s vital for boards to think of \nfundraising far beyond just being an \nexchange or a transaction.\n\n\u2018If you are doing things that are \njust about getting money, some of \nthe consequences could include a \ndisconnect and a disregard for the \ndonor relationship because you are just \nfocused on the organisation\u2019s needs \nrather than the donor\u2019s needs,\u2019 he says.\n\nHe defines fundraising as a mechanism \naround people\u2019s desires to do \nsomething useful which, in essence, \nis philanthropy. This is then supported \nthrough the construct of meaningful \nrelationships that must be focused on \nthose willing to give, rather than what \nthe organisation wants.\n\nHarris believes charity boards need \nto take a longer term, bigger picture \nperspective rather than focusing on \nmeeting immediate needs. \n\nMany charities are just trying to survive \nin the short term, but he says: \u2018If you \nreally exist to serve a mission, it\u2019s likely \nthat your mission is longitudinal and \nthat it won\u2019t be achieved in months or \neven a couple of years. So unless you \nhave a sustainable long-term approach \nto funding your mission, there\u2019s a \nfundamental question as to why you \nare actually there and even doing what \nyou are doing. \n\nThat\u2019s confronting to many \norganisations because we can all be \nconvinced of the good work we do. \nBut it all feeds back to the question: \nare you focusing on the transaction or \nthe relationship? It\u2019s relationships that \ncreate value and meaning over time.\u2019\n\nHarris warns that boards focused just \non short-term revenue may be wasting \nmoney by repeating activities and \non re-engaging donors, rather than \nenjoying the long-term efficacy that \ncomes through relationships.\n\n\u2018In sales, it\u2019s far better to retain a \ncustomer than to acquire a new \ncustomer. The same is true in \nfundraising. It is far better to retain a \ndonor than to acquire a new one,\u2019 \nhe says.\n\nHarris is concerned that some boards \nstill talk about measurements like the \ncosts of fundraising and apply basic \nratios without considering the nature of \nfundraising and the desired outcomes.\n\n\u2018There is a validity around a cost-based \nmetric if it is considered in an informed \ncontext, but what I see happening is \nthat organisations

are using this in a \nvery general way and are also seeking \nto use it in a comparative fashion, \nwhich makes no sense,\u2019 says Harris.\n\nInstead, he believes boards should \nbe asking for long-term measures \non factors like the longevity of \n\nrelationships, relationship progression \nand the life-time value of donors. And \nthey should be looking at least three \nyears ahead, although five years is \nbetter.\n\n\u2018Questions around donor engagement \nare very important. Unless you are really \nfocused on your market \u2014 that is, the \ndonor cohort \u2014 there is a massive risk \nof being very self-indulgent in how you \nare see your programs.\u2019\n\nIn addition to relationships, another \nlong-term funding risk that boards \nneed to consider are third party \nrepresentatives as the recent \n\u2018chuggers\u2019 class action against \nfundraising company Appco \ndemonstrates.\n\nWhile it often makes sense to use third \nparty representatives to raise funds, \nHarris says its vital that boards don\u2019t \nneglect their oversight of this area and \ncarefully watch how arrangements \naffect relationships with supporters.\n\n\u2018If you are compromising the nature of \nyour relationship with donors or the \nreputation of your organisation or if \nthere are questions around the way \nthe third party may be operating, this \nreally needs to be examined. From \na commercial perspective, it makes \nsense to look at this as a question \nacross different modalities, but it really \ndoes come back to the very specific \nand individual questions for each \norganisation. The way every board will \nanswer this will be slightly different. \n\n\u2018It\u2019s not a case of being so risk \naverse that you resist third party \nrepresentation, but it is necessary to \n\n6\n\nBoards focused just on short-term revenue \nmay be wasting money by repeating \nactivities and on re-engaging donors, \nrather than enjoying the long-term \nefficacy that comes through \nrelationships.\n\nUnderstand the nature of the process, \nwhat you are outsourcing, what\u2019s \nhappening behind the fundraising \nactivity, who you are working with and \nwhy, what the risks are and how these \nare being managed and mitigated.\u2019\n\nRecent fundraising scandals in the UK \nwhere unscrupulous fundraisers were \naccused of targeting old and vulnerable \ngivers highlight just how important this \nunderstanding is, he says.\n\n\u2018Some people in your audience may be \nvulnerable \u2014 for example, they may be \nolder. But there are many older people \nwho are perfectly capable of making \ngood decisions and are at stage of their \nlives where they want to give back. You \ndon\u2019t have to avoid this market. You \njust need to be conscious about what \nconversations you are having with it.\u2019\n\nHarris continues: \u2018The whole \nproposition of asking people to support \nyou is factored around emotional \nengagement. It won\u2019t necessarily \nresonate with some and it will inevitably \ndisturb others. If fundraising is soft and \ncomfortable and no one remarks on it, \nyou are probably going to have a very \nineffective fundraising program that will \nhave little or no outcome.\n\n\u2018But if everyone\u2019s feathers are ruffled, \nthat\u2019s also a problem. Also of concern is \nif the people who present your message \nbehave in a way that\u2019s confronting, \ninappropriate or unnecessarily intrusive. \nThat\u2019s not okay.\u2019\n\nHarris adds that the oversight of \nvolunteers and staff is just important \nas that of third parties. They also \nrepresent the organisation and could \njust as easily damage its reputation or \nrelationship with its donors. And there\u2019s \nno easy way to prevent this.\n\n\u2018Organisations are built on the back \nof volunteer effort. You have greater \nmeans to exercise control over third \nparties through the commercial \narrangements than you have with \nvolunteers in so much as they have \ngoodwill and emotion,\u2019 says Harris.\n\n\u2018All you can do is be aware of the risk \nand

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Boards also need to take a long-term view to the organisation's cultural health, its people and retaining staff, says Harris.

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Harris says many charities aren't prepared to spend money on things that don't directly get a financial return. This gets back to the problem of short-termism. For example, we don't talk about customer or donor care. If every communication you have with your supporters is around asking them for their support, you are exercising a very transactional approach in how you go about your business. It's also important to engage the people that support you more broadly about what they are supporting and what happens as a result of their support. That's good donor stewardship, but the problem is that it costs money.

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Harris continues: "The whole proposition of asking people to support you is factored around emotional engagement. It won't necessarily resonate with some and it will inevitably disturb others. If fundraising is soft and uncomfortable and no one remarks on it, you are probably going to have a very ineffective fundraising program that will have little or no outcome."

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2017\n\n", "extra": {"cited_message_idx": 12, "search_result_idx": null, "evidence_text": "source", "cloud_doc_url": null}}, {"start_ix": 3443, "end_ix": 3454, "citation_format_type": "tether_og", "metadata": {"type": "file", "name": "tactiq-free-transcript-XPS_nhwiVyc.txt", "id": "file-WCbtUrnuRduzyrXzXHOMljsE", "source": "my_files", "text": "# tactiq.io free youtube transcript\n# Ten Minutes to Sustainable Funding\n# https://www.youtube.com/watch/XPS_nhwiVyc\n\n00:00:02.419 hi I'm Terry Axelrod the founder of Ben\n00:00:05.460 'van thank you for joining me for this\n00:00:07.770 brief overview of the Ben Avadh model a\n00:00:10.070 systematic process for engaging and\n00:00:12.570 developing relationships with individual\n00:00:14.700 donors who truly believe in your work\n00:00:16.980 and will support your organization for\n00:00:19.109 the long term this model was developed\n00:00:21.750 at an inner-city school and can be\n00:00:23.789 customized to any organization that is\n00:00:26.279 committed to getting off the year to\n00:00:27.840 year fundraising treadmill and willing\n00:00:30.060 to follow this evidence-based\n00:00:31.640 step-by-step process if after watching\n00:00:34.860 this video you are serious about\n00:00:36.570 implementing the model I encourage you\n00:00:38.700 to watch our full 55 minute video on the\n00:00:41.280 Benetton website ok let's get started\n00:00:44.280 first thing you'll notice it's a circle\n00:00:46.710 think of it like an old-fashioned toy\n00:00:48.930 train track donors get on that track and\n00:00:51.329 go round and round for life they get on\n00:00:54.239 the track at step one with something we\n00:00:56.489 call a point of entry a sizzling one our\n00:00:59.489 get acquainted event rather than being a\n00:01:02.280 tour of your programs or your facilities\n00:01:04.260 this is a one-hour tour of your mission\n\nThe file is too long and its contents have been truncated.\n", "extra": {"cited_message_idx": 15, "search_result_idx": null, "evidence_text": "source", "cloud_doc_url": null}}, {"start_ix": 4665, "end_ix": 4676, "citation_format_type": "tether_og", "metadata": {"type": "file", "name": "GW ASSIGNMENT 1.docx", "id": "file-eZEMTL77a0E8Ye5g9v164MyI", "source": "my_files", "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\nMay 19 2024\n\nIntroduction\n\nThe Global Happiness Initiative Foundation stands out with its unique approach. We believe 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. These ideas reflect our vision where individual happiness is the cornerstone of societal harmony.\n\nAs the renowned author John Donne (2010) famously proclaimed \u201cNo man is an island.\u201d 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.\n\nIn 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 necessary skills 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 key well-being services globally with our efforts first being localized in the United States and Italy. By doing so we aim to improve the quality of life and foster sustained happiness in diverse communities. This goal will not only benefit the communities we serve but also 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 not just beneficial; they are 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 & 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. By the end of the first six months we will secure partnerships with at least five major healthcare providers. These collaborations will focus on providing comprehensive health services emphasizing preventive care and mental health which are crucial for 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

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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.
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Demonstrating Capacity through Strategic Intentions:

While 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.

Cross-Sector Collaboration

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.

Localized Educational Partnerships

GHIF 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 that 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.

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Community Engagement

Integral 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

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Program Plan

Introduction to Program Strategy

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 simplifies the process for individuals to access 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.

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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.

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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.

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

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Global Happiness Initiative Foundation
 Alexis Lindsay
 Claremont Lincoln University
 MSI 5323-01: Grant Writing and Sustainable Fundraising
 Professor Javier Lopez
 May 19 2024
 Introduction
 The Global Happiness Initiative Foundation stands out with its unique approach. We believe 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. These ideas reflect our vision where individual happiness is the cornerstone of societal harmony.

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 necessary skills 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 key well-being services globally with our efforts first being localized in the United States and Italy. By doing so we aim to improve the quality of life and foster sustained happiness in diverse communities. This goal will not only benefit the communities we serve but also 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 not just beneficial; they are 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 & 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.

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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

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on the revenue aspects of fundraising alone, they are missing a fundamental understanding of what fundraising is about and what drives it. That's the view of Nigel Harris, CEO of the Mater Foundation and chair of the Fundraising Institute of Australia, who believes it's vital for boards to think of fundraising far beyond just being an exchange or a transaction.

If you are doing things that are just about getting money, some of the consequences could include a disconnect and a disregard for the donor relationship because you are just focused on the organisation's needs rather than the donor's needs,

he says.

He defines fundraising as a mechanism around people's desires to do something useful which, in essence, is philanthropy. This is then supported through the construct of meaningful relationships that must be focused on those willing to give, rather than what the organisation wants.

Harris believes charity boards need to take a longer term, bigger picture perspective rather than focusing on meeting immediate needs.

Many charities are just trying to survive in the short term, but he says:

If you really exist to serve a mission, it's likely that your mission is longitudinal and that it won't be achieved in months or even a couple of years. So unless you have a sustainable long-term approach to funding your mission, there's a fundamental question as to why you are actually there and even doing what you are doing.

That's confronting to many organisations because we can all be unconvinced of the good work we do. But it all feeds back to the question: are you focusing on the transaction or the relationship? It's relationships that create value and meaning over time.

Harris warns that boards focused just on short-term revenue may be wasting money by repeating activities and not re-engaging donors, rather than enjoying the long-term efficacy that comes through relationships.

In sales, it's far better to retain a customer than to acquire a new customer. The same is true in fundraising. It is far better to retain a donor than to acquire a new one,

he says.

Harris is concerned that some boards still talk about measurements like the costs of fundraising and apply basic ratios without considering the nature of fundraising and the desired outcomes.

There is a validity around a cost-based metric if it is considered in an informed context, but what I see happening is that organisations are using this in a very general way and are also seeking to use it in a comparative fashion, which makes no sense,

says Harris.

Instead, he believes boards should be asking for long-term measures not factors like the longevity of relationships, relationship progression and the life-time value of donors. And they should be looking at least three years ahead, although five years is better.

Questions around donor engagement are very important. Unless you are really focused on your market that is, the donor cohort there is a massive risk of being very self-indulgent in how you see your programs.

In addition to relationships, another long-term funding risk that boards need to consider are third party representatives as the recent chuggers class action against fundraising company Appco demonstrates.

While it often makes sense to use third party representatives to raise funds, Harris says it's vital that boards don't neglect their oversight of this area and carefully watch how arrangements affect relationships with supporters.

If you are compromising the nature of your relationship with donors or the reputation of your organisation or if there are questions around the way the third party may be operating, this really needs to be examined. From a

commercial perspective, it makes \nsense to look at this as a question \nacross different modalities, but it really \ndoes come back to the very specific \nand individual questions for each \norganisation. The way every board will \nanswer this will be slightly different. \n\n\u2018It\u2019s not a case of being so risk \naverse that you resist third party \nrepresentation, but it is necessary to \n\n6\n\nBoards focused just on short-term revenue \nmay be wasting money by repeating \nactivities and on re-engaging donors, \nrather than enjoying the long-term \nefficacy that comes through \nrelationships.\n\nunderstand the nature of the process, \nwhat you are outsourcing, what\u2019s \nhappening behind the fundraising \nactivity, who you are working with and \nwhy, what the risks are and how these \nare being managed and mitigated.\u2019\n\nRecent fundraising scandals in the UK \nwhere unscrupulous fundraisers were \naccused of targeting old and vulnerable \ngivers highlight just how important this \nunderstanding is, he says.\n\n\u2018Some people in your audience may be \nvulnerable \u2014 for example, they may be \nolder. But there are many older people \nwho are perfectly capable of making \ngood decisions and are at stage of their \nlives where they want to give back. You \ndon\u2019t have to avoid this market. You \njust need to be conscious about what \nconversations you are having with it.\u2019\n\nHarris continues: \u2018The whole \nproposition of asking people to support \nyou is factored around emotional \nengagement. It won\u2019t necessarily \nresonate with some and it will inevitably \ndisturb others. If fundraising is soft and \ncomfortable and no one remarks on it, \nyou are probably going to have a very \nineffective fundraising program that will \nhave little or no outcome.\n\n\u2018But if everyone\u2019s feathers are ruffled, \nthat\u2019s also a problem. Also of concern is \nif the people who present your message \nbehave in a way that\u2019s confronting, \ninappropriate or unnecessarily intrusive. \nThat\u2019s not okay.\u2019\n\nHarris adds that the oversight of \nvunteers and staff is just important \nas that of third parties. They also \nrepresent the organisation and could \njust as easily damage its reputation or \nrelationship with its donors. And there\u2019s \nno easy way to prevent this.\n\n\u2018Organisations are built on the back \nof volunteer effort. You have greater \nmeans to exercise control over third \nparties through the commercial \narrangements than you have with \nvunteers in so much as they have \ngoodwill and emotion,\u2019 says Harris.\n\n\u2018All you can do is be aware of the risk \nand mitigate that through the training \nand development of people and by \nobserving behaviours. We are talking \nabout a relationship-based activity. It\u2019s \nall about human interaction.\n\n\u2018Just understanding what the risks are \nand having them managed properly \nis the key to all of this. You can never \nremove the risks entirely.\u2019\n\nBoards also need to take a long-term \nview to the organisation\u2019s cultural \nhealth, its people and retaining staff, \nsays Harris.\n\n\u2018Fundraising staff turnover in Australia \nis still around the 18 months\u2019 mark and \nthere are problems with the supply of \nstaff. You can\u2019t make good progress if \nthe nature of the job is all about long-\nterm relationships. It\u2019s costly to retrain \nand hire new people and this almost \nnever seems to be considered.\u2019\n\nHarris says many charities aren\u2019t \nprepared to spend money on things \nthat don\u2019t directly get a financial \nreturn. \u2018This gets back to the problem \nof short-termism. For example, we \nntalk about customer or donor care. If \neverly communication you have with \nyour supporters is around asking them \nfor their support, you are exercising \na very transactional approach in how \nyou go about your business. It\u2019s also \nimportant to engage the people that \nsupport you more broadly about what \nthey are supporting and what happens \nas a result of

their support. That's good donor stewardship, but the problem is that it costs money. He observes: A statistic I heard recently was that around 85 per cent of donations or gifts that are given occur through fundraising activity. So, even though people are philanthropically wired, they won't find their way to give on their own by and large. Thus, fundraising isn't a necessary evil. It's an important way to help people fulfil their philanthropy. Harris also believes it's vital for boards to show leadership in philanthropy and to set the tone that encourages others to give. If you are asking others to give support, but your leaders aren't, then there are some big questions to be asked. Lead from the front. That does not mean giving the biggest gifts. It just means engaging in philanthropy in the same way as you are asking others to.

Governance Directions February 2017

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track record\n00:00:34.239 how much does it cost to be your group\n00:00:36.500 where you get your money that's your\n00:00:37.460 budget and who's involved in the group\n00:00:39.410 and how do people get involved that's\n00:00:40.820 your structure and so you write down\n00:00:42.559 answers to all those questions obviously\n00:00:44.539 they're revisited every year the mission\n00:00:46.640 theoretically doesn't change it\n00:00:47.780 shouldn't change but it's reaffirmed\n00:00:48.980 every year but the history obviously\n00:00:50.300 changes and everybody has a copy of it\n00:00:52.850 every board member and so on and then\n00:00:54.409 any direct mail appeal any brochure any\n00:00:56.960 foundation proposal is built out of that\n00:00:58.819 original document and it's just\n00:01:00.260 tremendously important\n00:01:05.000 the second principle we have to look at\n00:01:06.890 once we have our case in place and we're\n00:01:08.240 really clear about what we do why we do\n00:01:10.130 it how we do it we have to take that and\n00:01:12.470 put it in front of people and what\n00:01:14.480 people don't realize is people become\n00:01:15.980 donors to organizations and then they\n00:01:17.390 build their loyalty to the organization\n00:01:18.620 over time and a tendency of some\n00:01:20.810 organizations for example is to say well\n00:01:22.430 you know this person gave ten thousand\n00:01:24.710 dollars to that group let me start by\n00:01:26.660 asking her for ten thousand dollars for\n00:01:28.010 my group but nobody very few people\n00:01:29.450 start at ten thousand dollars you know\n00:01:31.640 they started a hundred dollars at fifty\n00:01:32.900 dollars so we have to look at how does\n00:01:34.520 someone become a donor how do they stay\n00:01:36.080 a donor and that's a process they go\n00:01:38.600 from zero to one they have never given\n00:01:40.670 they make one gift by direct mail\n00:01:42.590 somebody asks some special event we\n00:01:44.510 thank them we tell them what we did with\n00:01:45.890 their money we ask them again they give\n00:01:47.810 again they give again and again\n00:01:49.190 eventually they become just a habitual\n00:01:50.690 donor\n00:01:51.229 everybody has organizations like this\n00:01:52.790 they get the newsletter they see it\n00:01:54.770 online they're like oh that's my group\n00:01:56.150 and you know then even ask any questions\n00:01:58.400 they're just sending their money then\n00:01:59.840 eventually we want to take some cross\n00:02:01.070 section of those people and say look you\n00:02:02.510 know could you do a little bit more is\n00:02:04.100 it possible for you to get more that's\n00:02:05.210 called the process of upgrade where we\n00:02:07.160 take a few people and we say how much\n00:02:08.989 does this group mean to really think\n00:02:10.459 about it and those are our thoughtful\n00:02:12.050 donors these are major donors and then\n00:02:14.209 of course the most thoughtful gift is\n00:02:15.410 where we say to somebody could you think\n00:02:17.150 about us when you're not here could you\n00:02:19.070 include us in your will but that's a\n00:02:21.260 process and each layer has to be\n00:02:23.150 observed and people tend to try to move\n00:02:24.800 to the to the bigger layers or\n00:02:26.840 alternatively they tend to not not move\n00:02:29.870 they tend to leave everybody at their\n00:02:31.190 same giving level and either those as a\n00:02:33.709 mistake\n00:02:37.860 why things we really want to make sure\n00:02:39.870 that we do as we build relationships\n00:02:41.330 okay you can imagine their strategies\n00:02:44.070 that work better for some parts of the\n00:02:46.170 relationship than others so direct mail\n00:02:47.730 is a great acquisition strategy it gets\n00:02:49.740 a lot of people to go from zero to one\n00:02:51.270 we don't really have time unless we're a\n00:02:53.490

tiny organization to go and see\n00:02:55.080 everybody and talk to them in person
in\n00:02:56.610 order to acquire them as donors so we\n00:02:58.530 try to bring in
as many as we can and\n00:03:00.330 then we start working with them but
some\n00:03:02.700 strategies are good for some things and\n00:03:04.080 some for
others and it's very important\n00:03:05.940 to say what are we trying to do are
we\n00:03:07.080 trying to acquire are we trying to build\n00:03:09.150 community and
we're trying to thank\n00:03:10.470 people are we trying to get
visibility\n00:03:12.780 what are we trying to do with our\n00:03:14.400 fundraising
when you want to get money\n00:03:16.740 which is what most people say I want
to\n00:03:18.120 get money I don't care about anything\n00:03:19.140 else then
the strategy you want to use\n00:03:21.209 is personal face-to-face
solicitation\n00:03:22.790 when you go to somebody who gives away\n00:03:25.530 money
cares about your cause how do you\n00:03:27.330 know that because you know them and
you\n00:03:29.130 ask them in person for money and that's\n00:03:31.380 the best
strategy and then all the other\n00:03:32.850 strategies come down from there
the\n00:03:35.040 personal phone call personal letter then\n00:03:37.650 the
impersonal strategy say a phonathon\n00:03:39.330 a direct mail appeal but a phonathon
is\n00:03:42.360 a very good acquisition strategy and\n00:03:43.860 direct mail
appeals and acquisition\n00:03:45.090 strategy each strategy is good for
some\n00:03:46.980 things and I think the key element in\n00:03:48.630 here is really
to tell board members\n00:03:50.400 what can they expect when they engage
in\n00:03:52.200 a strategy you have very smart board\n00:03:54.269 members
they're used to getting like\n00:03:55.200 straight A's are used to getting
95% on\n00:03:57.150 their tests and then then they go out\n00:03:59.040 and they ask
all their friends for money\n00:04:00.120 and only half their friends give
money\n00:04:01.500 and they think oh my god you know\n00:04:02.850 they're just
devastated but in fact if\n00:04:04.470 we tell them you know what under
the\n00:04:05.730 best of all possible worlds only half\n00:04:07.560 the people are
going to give you the\n00:04:08.700 money you asked for then they're
fine\n00:04:10.350 with that you sent out a hundred letters\n00:04:12.300 at the best
of all possible worlds one\n00:04:13.980 person is going to respond to you
that's\n00:04:15.269 1% that's the direct mail respond\n00:04:17.310 Wow is
that right yeah because\n00:04:18.810 fundraising is strictly vol
business\n00:04:25.120 so then the final principle we imagined\n00:04:27.430 the whole
thing of the principles of the\n00:04:28.990 case is the foundation relationships
one\n00:04:31.690 side strategies and other side kind of\n00:04:33.820 relationship
between the relationship\n00:04:35.169 building where we are in the\n00:04:36.250
relationship in the strategy then the\n00:04:37.510 roof of the whole thing is the
principle\n00:04:39.130 of diversity which says we have to have\n00:04:40.990 our
money coming from as many sources as\n00:04:42.790 we can manage and in order for that
to\n00:04:45.940 happen and I speak very slowly now in\n00:04:48.250 order for that to
happen we have to have\n00:04:49.810 as many people as we can possibly
manage\n00:04:51.760 helping to raise that money and that\n00:04:53.770 group of
people has to be led by the\n00:04:55.840 board of directors there can be
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sustainable long-term approach to fundraising

Zilla Efrat speaks with Nigel Harris about longevity of relationships, relationship progression and the life-time value of donors.

If boards just focus on the revenue aspects of fundraising alone, they are missing a fundamental understanding of what fundraising is about and what drives it. That's the view of Nigel Harris, CEO of the Mater Foundation and chair of the Fundraising Institute of Australia, who believes it's vital for boards to think of fundraising far beyond just being an exchange or a transaction.

If you are doing things that are just about getting money, some of the consequences could include a disconnect and a disregard for the donor relationship because you are just focused on the organisation's needs rather than the donor's needs, he says.

He defines fundraising as a mechanism around people's desires to do something useful which, in essence, is philanthropy. This is then supported through the construct of meaningful relationships that must be focused on those willing to give, rather than what the organisation wants.

Harris believes charity boards need to take a longer term, bigger picture perspective rather than focusing on meeting immediate needs.

Many charities are just trying to survive in the short term, but he says: If you really exist to serve a mission, it's likely that your mission is longitudinal and that it won't be achieved in months or even a couple of years. So unless you have a sustainable long-term approach to funding your mission, there's a fundamental question as to why you are actually there and even doing what you are doing.

That's confronting to many organisations because we can all be unconvinced of the good work we do. But it all feeds back to the question: are you focusing on the transaction or the relationship? It's relationships that create value and meaning over time.

Harris warns that boards focused just on short-term revenue may be wasting money by repeating activities and not re-engaging donors, rather than enjoying the long-term efficacy that comes through relationships.

In sales, it's far better to retain a customer than to acquire a new customer. The same is true in fundraising. It is far better to retain a donor than to acquire a new one, he says.

Harris is concerned that some boards still talk about measurements like the costs of fundraising and apply basic ratios without considering the nature of fundraising and the desired outcomes.

There is a validity around a cost-based metric if it is considered in an informed context, but what I see happening is that organisations are using this in a very general way and are also seeking to use it in a comparative fashion, which makes no sense, says Harris.

Instead, he believes boards should be asking for long-term measures not factors like the longevity of relationships, relationship progression and the life-time value of donors. And they should be looking at least three years ahead, although five years is better.

Questions around donor engagement are very important. Unless you are really focused on your market that is, the donor cohort that there is a massive risk of being very self-indulgent in how you see your programs.

In addition to relationships, another long-term funding risk that boards need to consider are third party representatives as the recent chuggers class action against fundraising company Appco demonstrates.

While it often makes sense to use third party representatives to raise funds, Harris says it's vital that boards don't neglect their oversight of this area and carefully watch how arrangements affect relationships with

supporters. If you are compromising the nature of your relationship with donors or the reputation of your organisation or if there are questions around the way the third party may be operating, this really needs to be examined. From a commercial perspective, it makes sense to look at this as a question across different modalities, but it really does come back to the very specific and individual questions for each organisation. The way every board will answer this will be slightly different. It's not a case of being so risk averse that you resist third party representation, but it is necessary to.

Boards focused just on short-term revenue may be wasting money by repeating activities and on re-engaging donors, rather than enjoying the long-term efficacy that comes through relationships. Understand the nature of the process, what you are outsourcing, what's happening behind the fundraising activity, who you are working with and why, what the risks are and how these are being managed and mitigated. Recent fundraising scandals in the UK where unscrupulous fundraisers were accused of targeting old and vulnerable givers highlight just how important this understanding is, he says.

Some people in your audience may be vulnerable. For example, they may be older. But there are many older people who are perfectly capable of making good decisions and are at stage of their lives where they want to give back. You don't have to avoid this market. You just need to be conscious about what conversations you are having with it.

Harris continues: The whole proposition of asking people to support you is factored around emotional engagement. It won't necessarily resonate with some and it will inevitably disturb others. If fundraising is soft and uncomfortable and no one remarks on it, you are probably going to have a very ineffective fundraising program that will have little or no outcome.

But if everyone's feathers are ruffled, that's also a problem. Also of concern is if the people who present your message behave in a way that's confronting, inappropriate or unnecessarily intrusive. That's not okay.

Harris adds that the oversight of volunteers and staff is just important as that of third parties. They also represent the organisation and could just as easily damage its reputation or relationship with its donors. And there's no easy way to prevent this.

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Just understanding what the risks are and having them managed properly is the key to all of this. You can never remove the risks entirely.

Boards also need to take a long-term view to the organisation's cultural health, its people and retaining staff,

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Fundraising staff turnover in Australia is still around the 18 months mark and there are problems with the supply of staff. You can't make good progress if the nature of the job is all about long-term relationships. It's costly to retrain and hire new people and this almost never seems to be considered.

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\n\n7Governance Directions February 2017\n\n", "cloud_doc_url": null}, {"matched_text": "\u3010\u2020source\u3011", "start_idx": 2910, "end_idx": 2921, "alt": null, "type": "file", "name": "interview_nigel_harris_february_2017.pdf", "id": "file-faSFT4gDC8RosjpXC6QoWh52", "source": "my_files", "snippet": "\nInterview Nigel Harris\n\nDriving the case for a sustainable long-\nterm approach to fundraising\nZilla Efrat speaks with Nigel Harris about longevity of relationships, relationship \nprogression and the life-time value of donors.\n\nIf boards just focus on \nthe revenue aspects of \nfundraising alone, they \nare missing a fundamental \nunderstanding of what \nfundraising is about and \nwhat drives it. \nThat\u2019s the view of Nigel Harris, CEO of \nthe Mater Foundation and chair of the \nFundraising Institute of Australia, who \nbelieves it\u2019s vital for boards to think of \nfundraising far beyond just being an \nexchange or a transaction.\n\n\u2018If you are doing things that are \njust about getting money, some of \nthe consequences could include a \ndisconnect and a disregard for the \ndonor relationship because you are just \nfocused on the organisation\u2019s needs \nrather than the donor\u2019s needs,\u2019 he says.\n\nHe defines fundraising as a mechanism \naround people\u2019s desires to do \nsomething useful which, in essence, \nis philanthropy. This is then supported \nthrough the construct of meaningful \nrelationships that must be focused on \nthose willing to give, rather than what \nthe organisation wants.\n\nHarris believes charity boards need \nto take a longer term, bigger picture \nperspective rather than focusing on \nmeeting immediate needs. \n\nMany charities are just trying to survive \nin the short term, but he says: \u2018If you \nreally exist to serve a mission, it\u2019s likely \nthat your mission is longitudinal and \nthat it won\u2019t be achieved in months or \neven a couple of years. So unless you \nhave a sustainable long-term approach \nto funding your mission, there\u2019s a \nfundamental question as to why you \nare actually there and even doing what \nyou are doing. \n\n\u2018That\u2019s confronting to many \norganisations because we can all be \nconvinced of the good work we do. \nBut it all feeds back to the question: \nare you focusing on the transaction or \nthe relationship? It\u2019s relationships that \ncreate value and meaning over time.\u2019\n\nHarris warns that boards focused just \non short-term revenue may be wasting \nmoney by repeating activities and \non re-engaging donors, rather than \nenjoying the long-term efficacy that \ncomes through relationships.\n\n\u2018In sales, it\u2019s far better to retain a \ncustomer than to acquire a new \ncustomer. The same is true in \nfundraising. It is far better to retain a \ndonor than to

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Recent fundraising scandals in the UK where unscrupulous fundraisers were accused of targeting old and vulnerable givers highlight just how important this understanding is, he says.

Some people in your audience may be vulnerable for example, they may be older. But there are many older people who are perfectly capable of making good decisions and are at stage of their lives where they want to give back. You don't have to avoid this market. You just need to be conscious about what conversations you are having with it.

Harris continues: "The whole proposition of asking people to support you is factored around emotional engagement. It won't necessarily resonate with some and it will inevitably disturb others. If fundraising is soft and uncomfortable and no one remarks on it, you are probably going to have a very ineffective fundraising program that will have little or no outcome.

But if everyone's feathers are ruffled, that's also a problem. Also of concern is if the people who present your message behave in a way that's confronting, inappropriate or unnecessarily intrusive. That's not okay.

Harris adds that the oversight of volunteers and staff is just as important as that of third parties. They also represent the organisation and could just as easily damage

its reputation or \nrelationship with its donors. And there\u2019s \nno easy way to prevent this.\n\n\u2018Organisations are built on the back \nof volunteer effort. You have greater \nmeans to exercise control over third \nparties through the commercial \narrangements than you have with \nvolunteers in so much as they have \ngoodwill and emotion,\u2019 says Harris.\n\n\u2018All you can do is be aware of the risk \nand mitigate that through the training \nand development of people and by \nobtaining behaviours. We are talking \nabout a relationship-based activity. It\u2019s \nall about human interaction.\n\n\u2018Just understanding what the risks are \nand having them managed properly \nis the key to all of this. You can never \nremove the risks entirely.\u2019 \n\nBoards also need to take a long-term \nview to the organisation\u2019s cultural \nhealth, its people and retaining staff, \nsays Harris.\n\n\u2018Fundraising staff turnover in Australia \nis still around the 18 months\u2019 mark and \nthere are problems with the supply of \nstaff. You can\u2019t make good progress if \nthe nature of the job is all about long-\nterm relationships. It\u2019s costly to retrain \nand hire new people and this almost \nnever seems to be considered.\u2019 \n\nHarris says many charities aren\u2019t \nprepared to spend money on things \nthat don\u2019t directly get a financial \nreturn. \u2018This gets back to the problem \nof short-termism. For example, we \n\ntalk about customer or donor care. If \never communication you have with \nyour supporters is around asking them \nfor their support, you are exercising \na very transactional approach in how \nyou go about your business. It\u2019s also \nimportant to engage the people that \nsupport you more broadly about what \nthey are supporting and what happens \nas a result of their support. That\u2019s good \ndonor stewardship, but the problem is \nthat it costs money.\u2019 \n\nHe observes: \u2018A statistic I heard \nrecently was that around 85 per cent of \ndonations or gifts that are given occur \nthrough fundraising activity. So, even \nthough people are philanthropically \nwired, they won\u2019t find their way to \ngive on their own by and large. Thus, \nfundraising isn\u2019t a necessary evil. It\u2019s an \nimportant way to help people fulfil their \nown philanthropy.\u2019 \n\nHarris also believes it\u2019s vital for boards \nto show leadership in philanthropy and \nto set the tone that encourages others \nto give. \u2018If you are asking others to give \nsupport, but your leaders aren\u2019t, then \nthere are some big questions to be \nasked. Lead from the front. That does \nnot mean giving the biggest gifts. It \njust means engaging in philanthropy \nin the same way as you are asking \nothers to.\u2019 \n\nGovernance Directions February 2017\n\n{\n \"cloud_doc_url\": null,\n \"matched_text\": \"\u00301015\u0030source\u003011\", \"start_idx\": 3443, \"end_idx\": 3454, \"alt\": null, \"type\": \"file\", \"name\": \"tactiq-free-transcript-XPS_nhwiVyc.txt\", \"id\": \"file-WCbtUrnuRduzyrXzXHOM1jsE\", \"source\": \"my_files\", \"snippet\": \"# tactiq.io free youtube transcript\n# Ten Minutes to Sustainable Funding\n# https://www.youtube.com/watch/XPS_nhwiVyc\n\n00:00:02.419 hi I'm Terry Axelrod the founder of Ben\n00:00:05.460 'van thank you for joining me for this\n00:00:07.770 brief overview of the Ben Avadh model\na\n00:00:10.070 systematic process for engaging and\n00:00:12.570 developing relationships with individual\n00:00:14.700 donors who truly believe in your work\n00:00:16.980 and will support your organization for\n00:00:19.109 the long term this model was developed\n00:00:21.750 at an inner-city school and can be\n00:00:23.789 customized to any organization that is\n00:00:26.279 committed to getting off the year to\n00:00:27.840 year fundraising treadmill and willing\n00:00:30.060 to follow this evidence-based\n00:00:31.640 step-by-step process if after watching\n00:00:34.860 this video you are serious about\n00:00:36.570

implementing the model I encourage you to watch our full 55 minute video on the Benetton website ok let's get started first thing you'll notice it's a circle think of it like an old-fashioned toy train track donors get on that track and go round and round for life they get on the track at step one with something we call a point of entry a sizzling one our acquainted event rather than being a tour of your programs or your facilities this is a one-hour tour of your mission

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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 key well-being services globally with our efforts first being localized in the United States and Italy. By doing so we aim to improve the quality of life and foster sustained happiness in diverse communities. This goal will not only benefit the communities we serve but also 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 not just beneficial; they are 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 & 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. By the end of the first six months we will secure partnerships with at least five major healthcare providers. These collaborations will focus on providing comprehensive health services emphasizing preventive care and mental health which are crucial for

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 shown positive impacts on 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 will include 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.
- Initiate discussions with potential partners and stakeholders to build a support network for immediate project launch upon funding.
- Demonstrating Capacity through Strategic Intentions:

While 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.

Cross-Sector Collaboration

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.

Localized Educational Partnerships

GHIF 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 that 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.

Healthcare Alliances

GHIF 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 according to local health reports. Studies have shown 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.

Public-Private Partnerships

GHIF 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 significantly enhance community health and well-being (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.

Community Engagement

Integral 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).

Program Plan

Introduction to Program Strategy

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 simplifies the process for individuals to access 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.

\n\n\n\n\n\t\nDeliverables\t\nActivities\t\nDue Date\t\nExpected Challenges\t\nSet up Referral Systems\t\nEstablish partnerships develop training for staff\t\nQ2 2025\t\nRegulatory hurdles securing partner cooperation\t\nLaunch Wellness Travel Packages\t\nDesign packages negotiate with travel agencies\t\nQ3 2025\t\nLogistics coordination ensuring accessibility and inclusion\t\nRollout Educational Programs\t\nDevelop curricula and integrate into schools\t\nQ4 2025\t\nAdaptation to local educational standards funding\t\nPublic Workshops and Seminars\t\nPlan and implement workshops and lifelong learning seminars\t\nQ1 2026\t\nCommunity engagement sustaining interest over time\n\n\nReferences\nCunningham W. E. Hays R. D. Ettl M. K. Dixon W. J. Liu R. C. -C. Beck C. K. & Shapiro M. F. (1998). The prospective effect of access to medical care on health-related quality-of-life outcomes in patients with symptomatic HIV disease. *Medical Care* 36(3) 295-306.\nDonne J. (2010). No man is an island. *Am Soc Neuroradiology*.\nGu D. Zhang Z. & Zeng Y. (2009). Access to healthcare services makes a difference in healthy longevity among older Chinese adults. *Social Science & Medicine* 68(2) 210-219.\nKilgo C. A. Ezell Sheets J. K. & Pascarella E. T. (2015). The link between high-impact practices and student learning: Some longitudinal evidence. *Higher Education* 69 509-525.\nKondrilli F. & Sunder N. (2022). Mental health effects of education. *Health Economics* 31 22-39.\nMattessich P. W. & Rausch E. J. (2014). Cross-sector collaboration to improve community health: A view of the current landscape. *Health Affairs* 33(11) 1968-1974.\nOvseiko P. V. Sullivan C. Powell S. C. Davies S. M. & Buchan A. M. (2014). Implementation of collaborative governance in cross-sector innovation and education networks: Evidence from the National Health Service in England. *BMC Health Services Research* 14 1-14.\nRandall S. White D. & Dennis S. (2023). A collaborative primary health care model for children and young people in rural Australia: Explorations of cross-sectoral leader action. *Australian Journal of Primary Health*.\nRoss C. E. & Van Willigen M. (1997). Education and the subjective quality of life. *Journal of Health and Social Behavior* 275-297.\nRoss C. E. & Wu C. (1995). The links between education and health. *American Sociological Review* 719-745.\nSeid M. Varni J. W. Cummings L. & Schonlau M. (2006). The impact of realized access to care on health-related quality of life: A two-year prospective cohort study of children in the California State Children's Health Insurance Program. *The Journal of Pediatrics* 149(3) 354-361.\nYoung T. Macinnes S. Jarden A. & Colla R. (2022). The impact of a wellbeing program imbedded in university classes: The importance of valuing happiness baseline wellbeing and practice frequency. *Studies in Higher Education* 47(4) 751-770.

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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.

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suitable for global replication.

Public-Private Partnerships

GHIF 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 significantly enhance community health and well-being (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.

Community Engagement

Integral 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).

Program Plan

Introduction to Program Strategy

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 simplifies the process for individuals to access 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.

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

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fundraising and sustainable fundraising. Support your answer with specific examples.

The main difference between **fundraising** and **sustainable fundraising** lies in the timeframe and the depth of relationships established with donors. Traditional fundraising often focuses on short-term goals, such as meeting annual budgets or funding specific projects, and may employ transactional methods that prioritize immediate gains. For instance, traditional fundraising might include one-off campaigns or events that raise money quickly but don't necessarily engage donors beyond their initial contribution.

In contrast, sustainable fundraising emphasizes **long-term relationships and donor retention**. This approach is rooted in the understanding that maintaining existing donors is more cost-effective and beneficial than continually acquiring new ones. Sustainable fundraising involves developing a deep understanding of donors' interests and motivations, and aligning them with the organization's long-term goals, thereby fostering a sense of shared commitment and ongoing support.

Another difference is the **strategic approach** employed in sustainable fundraising. While traditional fundraising might react to immediate needs or opportunities, sustainable fundraising is proactive and based on a strategic plan that incorporates a diverse range of fundraising activities tailored to different donor segments. For example, the Benetton model of sustainable fundraising involves a circle or cycle that engages donors continuously, ensuring that they remain connected and supportive over the long term.

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)?

The **2020 Nonprofit Leadership Impact Study** provided several insightful findings that are particularly relevant to the Global Happiness Initiative Foundation (GHIF).

Surprising: It was surprising to learn the extent to which nonprofit leaders prioritize adapting technology and innovation within their strategic planning. The focus on technological advancement as a means to enhance organizational reach and efficiency underlines a significant shift from traditional nonprofit operational strategies, reflecting a broader trend of digital transformation across sectors.

Relevant: The study's emphasis on the importance of leadership development and succession planning is highly relevant to GHIF. As a growing foundation, ensuring that leadership skills and knowledge are nurtured within the organization is crucial for sustainability and effectiveness. This insight supports the foundation's intention to invest in leadership training and development as part of its strategic objectives.

Helpful: The finding that effective communication and donor transparency are key to retaining and engaging supporters was particularly helpful. This aligns with GHIF's approach to sustainable fundraising, where building trust and maintaining open lines of communication with donors are seen as fundamental to long-term success. This reinforces the need for GHIF to continue enhancing its communication strategies to keep donors well-informed and engaged in its mission.

These aspects of the study not only provide a confirmation of some of GHIF's existing strategies but also offer a roadmap for areas of improvement and emphasis, such as technology use and leadership development.

With the attachments, which correspond to the reference list below, place the APA7 style in-text citations or signal phrases in their appropriate place in the passage above. Include a reference list below in APA 7 format of any additional sources you find cited but not in the reference list.

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"interview_nigel_harris_february_2017.pdf", "text": "\nInterview Nigel
Harris\n\nDriving the case for a sustainable long-term approach to
fundraising\nZilla Efrat speaks with Nigel Harris about longevity of relationships,
relationship progression and the life-time value of donors.\n\nIf boards just focus
on the revenue aspects of fundraising alone, they are missing a fundamental
understanding of what fundraising is about and what drives it. That's the
view of Nigel Harris, CEO of the Mater Foundation and chair of the Fundraising
Institute of Australia, who believes it's vital for boards to think of
fundraising far beyond just being an exchange or a transaction.\n\nIf you
are doing things that are just about getting money, some of the consequences could
include a disconnect and a disregard for the donor relationship because you are
just focused on the organisation's needs rather than the donor's
needs," he says.\n\nHe defines fundraising as a mechanism around people's
desires to do something useful which, in essence, is philanthropy. This is then
supported through the construct of meaningful relationships that must be focused
on those willing to give, rather than what the organisation wants.\n\nHarris
believes charity boards need to take a longer term, bigger picture perspective
rather than focusing on meeting immediate needs. \n\nMany charities are just trying
to survive in the short term, but he says: "If you really exist to serve a
mission, it's likely that your mission is longitudinal and that it won't
be achieved in months or even a couple of years. So unless you have a
sustainable long-term approach to funding your mission, there's a fundamental
question as to why you are actually there and even doing what you are doing.
That's confronting to many organisations because we can all be
convinced of the good work we do. But it all feeds back to the question: are you
focusing on the transaction or the relationship? It's relationships that
create value and meaning over time." Harris warns that boards focused just
on short-term revenue may be wasting money by repeating activities and not re-
engaging donors, rather than enjoying the long-term efficacy that comes through
relationships.\n\nIn sales, it's far better to retain a customer than to
acquire a new customer. The same is true in fundraising. It is far better to
retain a donor than to acquire a new one," he says.\n\nHarris is concerned
that some boards still talk about measurements like the costs of fundraising and
apply basic ratios without considering the nature of fundraising and the desired
outcomes.\n\nThere is a validity around a cost-based metric if it is
considered in an informed context, but what I see happening is that organisations
are using this in a very general way and are also seeking to use it in a
comparative fashion, which makes no sense," says Harris.\n\nInstead, he
believes boards should be asking for long-term measures not factors like the
longevity of relationships, relationship progression and the life-time value of
donors. And they should be looking at least three years ahead, although five years
is better.\n\nQuestions around donor engagement are very important. Unless
you are really focused on your market that is, the donor cohort
there is a massive risk of being very self-indulgent in how you see your
programs.\n\nIn addition to relationships, another long-term funding risk that
boards need to consider are third party representatives as the recent
chuggers' class action against fundraising company Appco
demonstrates.\n\nWhile it often makes sense to use third party representatives to

raise funds, Harris says it's vital that boards don't neglect their oversight of this area and carefully watch how arrangements affect relationships with supporters.

If you are compromising the nature of your relationship with donors or the reputation of your organisation or if there are questions around the way the third party may be operating, this really needs to be examined. From a commercial perspective, it makes sense to look at this as a question across different modalities, but it really does come back to the very specific and individual questions for each organisation. The way every board will answer this will be slightly different.

It's not a case of being so risk averse that you resist third party representation, but it is necessary to

Boards focused just on short-term revenue may be wasting money by repeating activities and on re-engaging donors, rather than enjoying the long-term efficacy that comes through relationships.

Understand the nature of the process, what you are outsourcing, what's happening behind the fundraising activity, who you are working with and why, what the risks are and how these are being managed and mitigated.

Recent fundraising scandals in the UK where unscrupulous fundraisers were accused of targeting old and vulnerable givers highlight just how important this understanding is, he says.

Some people in your audience may be vulnerable – for example, they may be older. But there are many older people who are perfectly capable of making good decisions and are at stage of their lives where they want to give back. You don't have to avoid this market. You just need to be conscious about what conversations you are having with it.

Harris continues: The whole proposition of asking people to support you is factored around emotional engagement. It won't necessarily resonate with some and it will inevitably disturb others. If fundraising is soft and uncomfortable and no one remarks on it, you are probably going to have a very ineffective fundraising program that will have little or no outcome.

But if everyone's feathers are ruffled, that's also a problem. Also of concern is if the people who present your message behave in a way that's confronting, inappropriate or unnecessarily intrusive. That's not okay.

Harris adds that the oversight of volunteers and staff is just as important as that of third parties. They also represent the organisation and could just as easily damage its reputation or relationship with its donors. And there's no easy way to prevent this.

Organisations are built on the back of volunteer effort. You have greater means to exercise control over third parties through the commercial arrangements than you have with volunteers in so much as they have goodwill and emotion,

says Harris.

All you can do is be aware of the risk and mitigate that through the training and development of people and by observing behaviours. We are talking about a relationship-based activity. It's all about human interaction.

Just understanding what the risks are and having them managed properly is the key to all of this. You can never remove the risks entirely.

Boards also need to take a long-term view to the organisation's cultural health, its people and retaining staff,

says Harris.

Fundraising staff turnover in Australia is still around the 18 months mark and there are problems with the supply of staff. You can't make good progress if the nature of the job is all about long-term relationships. It's costly to retrain and hire new people and this almost never seems to be considered.

Harris says many charities aren't prepared to spend money on things that don't directly get a financial return. This gets back to

the problem \nof short-termism. For example, we \n\ntalk about customer or donor care. If \nevery communication you have with \nyour supporters is around asking them \nfor their support, you are exercising \na very transactional approach in how \nyou go about your business. It\u2019s also \nimportant to engage the people that \nsupport you more broadly about what \nthey are supporting and what happens \nas a result of their support. That\u2019s good \ndonor stewardship, but the problem is \nthat it costs money.\u2019\n\nHe observes: \u2018A statistic I heard \nrecently was that around 85 per cent of \ndonations or gifts that are given occur \nthrough fundraising activity. So, even \nthough people are philanthropically \nwired, they won\u2019t find their way to \ngive on their own by and large. Thus, \nfundraising isn\u2019t a necessary evil. It\u2019s an \nimportant way to help people fulfil their \nown philanthropy.\u2019\n\nHarris also believes it\u2019s vital for boards \nto show leadership in philanthropy and \nto set the tone that encourages others \nto give.\u2018

If you are asking others to give \nsupport, but your leaders aren\u2019t, then \nthere are some big questions to be \nasked. Lead from the front. That does \nnot mean giving the biggest gifts. It \njust means engaging in philanthropy \nin the same way as you are asking \nothers to.\u2019

\n\nGovernance Directions February 2017\n\n", "title": "interview_nigel_harris_february_2017.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": "aaa2f6ef-7d01-4ac5-b050-6d04fc1629c9", "request_id": "88fecb270846bb14-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, "parent": "aaa2f6ef-7d01-4ac5-b050-6d04fc1629c9", "children": [{"id": "3c3ae62a-8546-4739-a297-59a18181c493"}], "3c3ae62a-8546-4739-a297-59a18181c493": {"id": "3c3ae62a-8546-4739-a297-59a18181c493", "message": {"id": "3c3ae62a-8546-4739-a297-59a18181c493", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1717743999.442431, "update_time": null, "content": {"content_type": "tether_quote", "url": "file-CQW0ok5LEtIJcsHA2f2ueS8F", "domain": "tactiq-free-transcript-uy4Un5atFTI.txt", "text": "# tactiq.io free youtube transcript\n# Four Essential Principles of Fundraising\n# https://www.youtube.com/watch/uy4Un5atFTI\n\n00:00:05.380 fundamental thing an organization needs\n00:00:07.309 as kind of the bottom of its you know\n00:00:09.379 the foundation of it is a case statement\n00:00:11.090 and a case statement is just a document\n00:00:12.799 that answers a number of questions and\n00:00:14.809 the questions follow the logic of how a\n00:00:17.689 person would probably talk to you about\n00:00:19.160 your organization so why do you exist\n00:00:21.610 that's your mission what do you do about\n00:00:24.349 why you exist those your goals how do\n00:00:27.050 you do that that's your outcomes or your\n00:00:28.880 objectives how long have you been doing\n00:00:31.130 it that's your history your track record\n00:00:34.239 how much does it cost to be your group\n00:00:36.500 where you get your money that's your\n00:00:37.460 budget and who's involved in the group\n00:00:39.410 and how do people get involved that's\n00:00:40.820 your structure and so you write down\n00:00:42.559 answers to all those questions obviously\n00:00:44.539 they're revisited every year the mission\n00:00:46.640 theoretically doesn't change it\n00:00:47.780 shouldn't change but it's reaffirmed\n00:00:48.980 every year but the history obviously\n00:00:50.300 changes and everybody has a copy of it\n00:00:52.850 every board member and so on and then\n00:00:54.409 any direct mail appeal any brochure any\n00:00:56.960 foundation proposal is built out of that\n00:00:58.819

original document and it's just tremendously
important the second principle we have to look at once we
have our case in place and we're really clear about what we do why
we do it how we do it we have to take that and put it in
front of people and what people don't realize is people
become donors to organizations and then they build their
loyalty to the organization over time and a tendency of
some organizations for example is to say well you know
this person gave ten thousand dollars to that group let me start
by asking her for ten thousand dollars for my group but
nobody very few people start at ten thousand dollars you
know they started a hundred dollars at fifty dollars so we
have to look at how does someone become a donor how do they
stay a donor and that's a process they go from zero
to one they have never given they make one gift by direct
mail somebody asks some special event we thank them we
tell them what we did with their money we ask them again they
give again they give again and again eventually they
become just a habitual donor everybody has organizations
like this they get the newsletter they see it online
they're like oh that's my group and you know then even ask any
questions they're just sending their money then eventually we
want to take some cross section of those people and say
look you know could you do a little bit more is it
possible for you to get more that's called the process of upgrade
where we take a few people and we say how much does this
group mean to really think about it and those are our
thoughtful donors these are major donors and then of
course the most thoughtful gift is where we say to somebody could you
think about us when you're not here could you include
us in your will but that's a process and each layer has to
be observed and people tend to try to move to the to the
bigger layers or alternatively they tend to not not move they
tend to leave everybody at their same giving level and either those
as a mistake why things we really want to make
sure that we do as we build relationships okay you can
imagine their strategies that work better for some parts of
the relationship than others so direct mail is a great
acquisition strategy it gets a lot of people to go from zero to
one we don't really have time unless we're a tiny
organization to go and see everybody and talk to them in person
in order to acquire them as donors so we try to bring in
as many as we can and then we start working with them but
some strategies are good for some things and some for
others and it's very important to say what are we trying to do are
we trying to acquire are we trying to build community and
we're trying to thank people are we trying to get
visibility what are we trying to do with our fundraising
when you want to get money which is what most people say I want

to\n00:03:18.120 get money I don't care about anything\n00:03:19.140 else then the strategy you want to use\n00:03:21.209 is personal face-to-face solicitation\n00:03:22.790 when you go to somebody who gives away\n00:03:25.530 money cares about your cause how do you\n00:03:27.330 know that because you know them and you\n00:03:29.130 ask them in person for money and that's\n00:03:31.380 the best strategy and then all the other\n00:03:32.850 strategies come down from there the\n00:03:35.040 personal phone call personal letter then\n00:03:37.650 the impersonal strategy say a phonathon\n00:03:39.330 a direct mail appeal but a phonathon is\n00:03:42.360 a very good acquisition strategy and\n00:03:43.860 direct mail appeals and acquisition\n00:03:45.090 strategy each strategy is good for some\n00:03:46.980 things and I think the key element in\n00:03:48.630 here is really to tell board members\n00:03:50.400 what can they expect when they engage in\n00:03:52.200 a strategy you have very smart board\n00:03:54.269 members they're used to getting like\n00:03:55.200 straight As are used to getting 95% on\n00:03:57.150 their tests and then then they go out\n00:03:59.040 and they ask all their friends for money\n00:04:00.120 and only half their friends give money\n00:04:01.500 and they think oh my god you know\n00:04:02.850 they're just devastated but in fact if\n00:04:04.470 we tell them you know what under the\n00:04:05.730 best of all possible worlds only half\n00:04:07.560 the people are going to give you the\n00:04:08.700 money you asked for then they're fine\n00:04:10.350 with that you sent out a hundred letters\n00:04:12.300 at the best of all possible worlds one\n00:04:13.980 person is going to respond to you that's\n00:04:15.269 1% that's the direct mail respond\n00:04:17.310 Wow is that right yeah because\n00:04:18.810 fundraising is strictly volume business\n00:04:25.120 so then the final principle we imagined\n00:04:27.430 the whole thing of the principles of the\n00:04:28.990 case is the foundation relationships one\n00:04:31.690 side strategies and other side kind of\n00:04:33.820 relationship between the relationship\n00:04:35.169 building where we are in the\n00:04:36.250 relationship in the strategy then the\n00:04:37.510 roof of the whole thing is the principle\n00:04:39.130 of diversity which says we have to have\n00:04:40.990 our money coming from as many sources as\n00:04:42.790 we can manage and in order for that to\n00:04:45.940 happen and I speak very slowly now in\n00:04:48.250 order for that to happen we have to have\n00:04:49.810 as many people as we can possibly manage\n00:04:51.760 helping to raise that money and that\n00:04:53.770 group of people has to be led by the\n00:04:55.840 board of directors there can be other\n00:04:57.669 people who help but the board has to set\n00:04:59.950 the pace with that\n", "title": "tactiq-free-transcript-uy4Un5atFTI.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": "0e18a81d-f89c-443b-b188-5dbb93882563", "request_id": "88fecb270846bb14-MXP", "timestamp_": "absolute"}, "recipient": "all", "channel": null}, {"parent": "0e18a81d-f89c-443b-b188-5dbb93882563", "children": [{"cc82ddcd-2a9e-4980-b0cf-93a22046d744"}], "cc82ddcd-2a9e-4980-b0cf-93a22046d744": {"id": "cc82ddcd-2a9e-4980-b0cf-93a22046d744", "message": {"id": "cc82ddcd-2a9e-4980-b0cf-93a22046d744", "author": {"role": "tool", "name": "myfiles_browser", "metadata": {}}, "create_time": 1717743999.442478, "update_time": null, "content": {"content_type": "tether_quote", "url": "file-5mt0zHfUpaxNb8dTv2dCW5tE", "domain": "tactiq-free-transcript-XPS_nhwiVyc.txt", "text": "# tactiq.io free youtube transcript\n# Ten Minutes to

Sustainable Funding\n# https://www.youtube.com/watch/XPS_nhwiVyc\n\n00:00:02.419 hi I'm Terry Axelrod the founder of Ben\n00:00:05.460 'van thank you for joining me for this\n00:00:07.770 brief overview of the Ben Avadh model a\n00:00:10.070 systematic process for engaging and\n00:00:12.570 developing relationships with individual\n00:00:14.700 donors who truly believe in your work\n00:00:16.980 and will support your organization for\n00:00:19.109 the long term this model was developed\n00:00:21.750 at an inner-city school and can be\n00:00:23.789 customized to any organization that is\n00:00:26.279 committed to getting off the year to\n00:00:27.840 year fundraising treadmill and willing\n00:00:30.060 to follow this evidence-based\n00:00:31.640 step-by-step process if after watching\n00:00:34.860 this video you are serious about\n00:00:36.570 implementing the model I encourage you\n00:00:38.700 to watch our full 55 minute video on the\n00:00:41.280 Benetton website ok let's get started\n00:00:44.280 first thing you'll notice it's a circle\n00:00:46.710 think of it like an old-fashioned toy\n00:00:48.930 train track donors get on that track and\n00:00:51.329 go round and round for life they get on\n00:00:54.239 the track at step one with something we\n00:00:56.489 call a point of entry a sizzling one our\n00:00:59.489 get acquainted event rather than being a\n00:01:02.280 tour of your programs or your facilities\n00:01:04.260 this is a one-hour tour of your mission\n00:01:06.830 there are three basic ingredients that\n00:01:09.750 must be present for this event to\n00:01:11.189 qualify as a point of entry first the\n00:01:13.920 facts about your organization but only\n00:01:16.049 at the 101 level second an emotional\n00:01:19.590 hook which is kind of a crass term you\n00:01:22.290 see as individuals we are emotional\n00:01:24.750 donors looking for rational reasons to\n00:01:26.850 justify our emotional decisions to give\n00:01:29.070 and third capturing the names of the\n00:01:32.159 guests with their permission it's the\n00:01:34.350 end of leaving your business card in the\n00:01:35.850 bowl for a drawing this model is\n00:01:37.710 permission based you don't ask anyone\n00:01:40.380 for money at a point of entry guests\n00:01:42.600 must be invited word-of-mouth by a\n00:01:44.280 friend and they're told in advance\n00:01:46.350 they'll be called afterwards for their\n00:01:48.180 feedback in the course of the tightly\n00:01:50.880 crafted our guests learn about the three\n00:01:53.460 broad areas of impact of your work\n00:01:55.860 we call them buckets you share myths\n00:01:58.469 facts stories and needs in an authentic\n00:02:01.469 deeply moving way which leaves the\n00:02:04.020 guests saying I had no idea you did all\n00:02:06.299 this here I have ideas for you other\n00:02:08.758 people who should know about this but\n00:02:10.560 I've got to go no problem you say I'll\n00:02:13.350 give you a call which leads to the\n00:02:15.780 second step of the model step two is a\n00:02:18.810 one-on-one follow-up call with every\n00:02:21.000 guest that's come to a point of entry\n00:02:22.710 within two or three days if you adopt\n00:02:25.560 the model you'll be having two point of\n00:02:27.750 entry events monthly with 10 to 15\n00:02:30.300 guests at each one that means your\n00:02:32.610 development director or team leader will\n00:02:34.380 be making twenty to thirty follow-up\n00:02:36.180 calls a month this is not a polite thank\n00:02:39.030 you call we refer to it as a one-on-one\n00:02:41.130 focus group the purpose is to determine\n00:02:44.250 the person's level of interest in\n00:02:45.870 becoming more involved with your\n00:02:47.040 organization the call has five points\n00:02:49.800 first thank you for coming and you\n00:02:52.800 better mean it it's amazing they took\n00:02:54.720 the time next what did you think of

our\n00:02:57.960 cute kids the teachers what did you even\n00:03:00.120 think about the weather third be quiet\n00:03:03.000 and listen listen for the hot buttons\n00:03:05.340 the tour might have triggered one of our\n00:03:07.680 groups is working to cure a disease with\n00:03:09.510 seven strains when they make their\n00:03:11.670 follow-up calls they might hear I'm most\n00:03:13.830 interested in that third strain of the\n00:03:15.450 disease because that's the one my mother\n00:03:16.980 has that's a big hot button and you\n00:03:19.770 won't tune into it unless you're\n00:03:21.060 listening closely next is there any way\n00:03:24.240 you can see yourself getting involved\n00:03:25.830 with us any way at all\n00:03:27.810 you've got no hidden agenda and finally\n00:03:30.840 is there anyone else you can think of we\n00:03:33.210 should invite to a similar point of\n00:03:34.830 entry those who aren't interested we do\n00:03:37.980 what we call bless and release there's\n00:03:40.140 no need for begging for a one-time gift\n00:03:42.410 even those who are not interested in\n00:03:44.700 becoming involved themselves may have\n00:03:46.650 others to refer if your point of entry\n00:03:48.720 is as we like to say sizzling let's move\n00:03:52.530 on to step number three asking for money\n00:03:54.950 notice we didn't do any asking at steps\n00:03:57.630 one or two we wait until the fruit is\n00:04:00.090 ripened at step number three everything\n00:04:03.150 between steps two and three is what we\n00:04:05.190 call the cultivation superhighway where\n00:04:07.620 we hasten the ripening of the fruit what\n00:04:10.260 makes the fruit ripen faster our\n00:04:11.940 contacts research shows the more contact\n00:04:15.540 you have with a donor after they've been\n00:04:17.640 educated and inspired at your point of\n00:04:19.440 entry event the more money they'll give\n00:04:21.510 you when you finally ask what is a\n00:04:23.970 contact\n00:04:25.250 a newsletter an invitation to an event\n00:04:27.350 the best contacts are in person and\n00:04:30.170 based on what they told you they were\n00:04:31.670 most interested in on the follow-up call\n00:04:33.560 like the strain of the disease their\n00:04:35.390 mother has we had a lady at the school\n00:04:38.090 who cultivated herself right through the\n00:04:39.950 process by inviting her friends to take\n00:04:41.780 the tours and then as her friends got\n00:04:44.210 more involved she got more involved they\n00:04:46.880 donated backpacks shoes jeans a covered\n00:04:50.300 outdoor play area and a physical\n00:04:52.370 education teacher for the kids at the\n00:04:54.170 school these are people who cultivate\n00:04:56.690 themselves and before you even get to\n00:04:58.700 the third step they're wondering why\n00:05:00.560 hasn't anyone asked me for any money yet\n00:05:02.500 on to step three asking there are two\n00:05:06.590 ways to ask one-on-one in person and at\n00:05:09.890 an asked event the ask event is free and\n00:05:12.980 one hour sixty minutes long its purpose\n00:05:16.250 is strictly to give these well\n00:05:17.840 cultivated new friends of the\n00:05:19.340 organization an opportunity to become\n00:05:21.590 donors it's not a substitute for a point\n00:05:24.320 of entry event guests are invited to the\n00:05:26.900 ask event by the same person who invited\n00:05:28.910 them to attend the point of entry they\n00:05:31.100 know they will be asked to give at the\n00:05:32.720 ask event but that there's no minimum\n00:05:34.370 and no maximum the program for the free\n00:05:37.910 one hour ask event is tightly crafted\n00:05:39.560 with a welcome from a board member an\n00:05:42.080 inspiring visionary leader talk a moving\n00:05:45.440 video with three testimonial stories\n00:05:47.630 showcasing your three bucket areas and a\n00:05:50.090 live

testimonial culminating in the last ten minutes what we call the pitch where people are invited to join your multiple year giving Society with three giving levels starting at \$1,000 a year for five years and going up from there there's also a fill-in-the-blanks box for people to give whatever they'd like you're not trying to persuade people to give you anything at the ask event the people who join the giving Society have been well cultivated and feel honored to give we expect about 50 percent of the guests at the ask event to give the average group we train in coach raises two hundred thousand dollars at their ask event including pledges we teach our groups to cultivate one or more donors for a leadership or challenge gift which is announced at the ask event as well purpose of the ask event is to launch and then grow your base of multiple year giving society donors some of whom with personal cultivation will become more major donors over time the day after the ask event you're on the phone calling your new donors thanking them for their generous gifts asking for their feedback about the event what I heard when I made these calls the day after our first ask event at the school was if I had known how great that event was going to be I would have invited other people they had specific people in mind so I asked them would you be willing to be a table captain next year and between now and next year's to ask event you could introduce those other people to the organization how by becoming an ambassador and inviting them to a point of entry where we will educate and inspire them we will follow up bless and release those who don't want to get involved and cultivate those who do so that by the time they're sitting at your table next year at the ask event they'll be ready to give having these donors who have chosen to join your multiple year giving Society by pledging at least a thousand dollars a year for five years lets you know which donors have committed to supporting your work over time it lets you know where to focus your donor cultivation efforts we do that by inviting these multiple year donors to small mission focused free feel-good cultivation events at step four in the model like an award ceremony or school graduation program related events you're already doing to reconnect these multi year donors to your real work this free feel-good cultivation event serves as a point of re-entry that has facts emotion and you'll already have their names because you invited them to attend these events therefore three days after these points of re-entry just like after a first-time point of entry you follow up constantly deepening your relationship leading up to the next ask if you keep following this model over time your base of multiple year donors will grow very organically at the school where the model was started once we exceeded a hundred donors that are multiple

you're\n00:08:47.890 giving society we were able to complete\n00:08:50.110 a
 capital campaign for a new building\n00:08:52.770 3.2 million dollars in six months
 from\n00:08:56.110 18 of the same donors that had just\n00:08:58.420 joined the giving
 society and by the\n00:09:00.580 seventh year we had over 500 donors in\n00:09:03.490
 our multiple year giving Society and we\n00:09:06.070 were able to complete an
 endowment\n00:09:07.390 campaign raising fifteen million dollars\n00:09:10.270 from a
 subset of those same donors that\n00:09:13.210 15 million dollars when invested
 wisely\n00:09:15.960 threw off an interest enough money to\n00:09:18.490 cover our
 operating gap each year\n00:09:20.350 allowing our little school to get off
 at\n00:09:22.990 year-to-year hand-to-mouth treadmill in\n00:09:25.450 other words
 these same donors who make\n00:09:28.330 unrestricted gifts in your multiple
 year\n00:09:30.370 giving Society become the pool of donors\n00:09:32.890 you
 cultivate for capital for endowment\n00:09:35.650 and even restricted major gifts like
 the\n00:09:38.200 library or Technology Center at our\n00:09:40.270 school allowing
 you to leave a legacy of\n00:09:43.360 a self-sustaining mission based\n00:09:45.430
 individual Giving Program for your\n00:09:47.590 favorite nonprofit organization so
 there\n00:09:50.740 you have it a brief overview of the been\n00:09:52.480 Ivana model
 for sustainable funding I\n00:09:54.490 hope you can see how this model
 could\n00:09:56.500 work for you we have many other\n00:09:58.870 resources available
 to help you learn\n00:10:00.850 more and share this approach with others\n00:10:02.890
 on your team including a 55 minute video\n00:10:06.100 overview of the model recorded
 at one of\n00:10:08.500 our live introductory sessions if you'd\n00:10:11.080
 like more information please contact us\n00:10:13.030 at ben avon comm thanks again
 for\n00:10:15.820 joining me for this brief overview of\n00:10:17.620 the Ben Ivana
 model we look forward to\n00:10:20.230 hearing from you\n", "title": "tactiq-free-
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 21(1)\n\nDOI:10.1002/nvsm.1546\n\nAuthors:\n\nTo read the full-text of this research,
 you can request a copy directly from the authors.\n\nAbstract\n\nIn this paper, we
 examine the characteristics of charities\nthat have generated substantive increases in
 their\nfundraising income. We interviewed 25 fundraising\ndirectors and team members,
 from organizations\nexperiencing rapid growth, adopting a \u201cdecoding
 the\ndiscipline\u201d approach to identify how each organization had\novercome key
 barriers to its success. We identify that\nfundraising leaders in these exceptional
 nonprofits focus\nparticularly on matters connected to their team,\norganizational

structures that support that team, and the development of an organization's learning culture. We also find that these teams were successful because of the systems way in which they understood and coped with the complexities of decision making. They were exceptional in isolating the right problems and exceptional too in the processes they adopted to solve them.

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Adrian Sargeant Jen Shang
Institute for Sustainable Philanthropy

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Patient-activist or ally? Assessing the effectiveness of conscience and beneficiary constituents in disease advocacy fundraising

Article Full-text available

May 2023

SOCIOL HEALTH ILL

Edward T. Walker

Tijs van den Broek

Anna Priante

Michel Ehrenhard

The evolution of fundraising practices in the Italian non profit context:

The "Lega del Filo d'Oro"; case beneficiary and conscience constituents-in DAO fundraising.

We study fundraising as a critical indicator of the effectiveness of activism as it is a central goal of DAOs to support medical research (Best, 2012(Best, , 2019. In particular, we focus on fundraising as a group-based strategy, which is common in campaigns to generate friendly competition and accountability (Priante et al., 2021) both in workplace and non-workplace settings (see Sargeant & Shang, 2016). That is, fundraising groups in disease advocacy also vary in where supporters fundraise—through friendship-versus workplace-based networks—and we investigate how this interacts with constituent types. ... A notable body of scholarship, primarily in non-profit studies, has pointed out the wisdom of fundraising through groups, given that group membership generates friendly competition, accountability and monitoring. Coordinated groups—as a type of “team” supporting collective action—are critical for increasing the accountability and monitoring of individual contributions (Sargeant & Shang, 2016) and helping to overcome free rider problems (Marwell

& Oliver, 1993). In addition, the group-fundraising strategy has been found to collect higher donation amounts than relying upon individuals, because they can count on their social capital (Priante et al., 2021). ... This is part of the reason, for instance, why workplace fundraising campaigns such as the United Way in the US are often so effective (Barman, 2006), similar to payroll-based giving in the UK (Romney-Alexander, 2002). Those requesting donations for such campaigns can be enlisted into self-selected fundraising groups (Sargeant & Shang, 2016) within workplaces that can support friendly competition against peers, while tapping into contributions from coworkers' networks. Thus, for DAOs, this offers those who have little or no experience with the illness an avenue for making contributions, thereby dramatically broadening resource pools. ...

View Show abstract ... Non-profit organizations have discovered that they can benefit from many marketing practices (Khare, 2011) taken from the for profit sector. The file is too long and its contents have been truncated.

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                  "### Part A: Discuss what you believe are the two essential elements of sustainable fundraising and explain your rationale with examples\n\nSustainable fundraising is not just about generating funds but about fostering enduring relationships and organizational growth. As highlighted by Nigel Harris, CEO of the Mater Foundation, the first essential element is *longevity of relationships*. Harris emphasizes that fundraising must transcend transactional interactions to nurture relationships that enhance donor retention and ongoing support, ensuring long-term organizational stability (Harris, 2017).\n\nThe second essential element is a *clear and compelling case statement*. This foundational document articulates the organization's mission, goals, and how donor contributions impact these objectives. A robust case statement is crucial as it aligns fundraising efforts with the organization's strategic goals, ensuring that both potential and current supporters clearly understand their contributions' significance (Hartford Foundation, 2011).\n\nBoth

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elements are integral to building a fundraising approach where donors feel deeply connected to the cause, fostering sustained engagement and support.

Part B: What are the two main differences between fundraising and sustainable fundraising. Support your answer with specific examples

The primary difference between fundraising and sustainable fundraising lies in the strategic focus and relationship depth with donors. Traditional fundraising often focuses on immediate financial targets, potentially overlooking the importance of donor relationships. For instance, a campaign may succeed financially but fail to engage donors beyond the initial contribution, leading to challenges in future fundraising efforts.

Conversely, sustainable fundraising emphasizes long-term relationships and donor retention, recognizing that it is more cost-effective and impactful to maintain existing donors than to continuously acquire new ones. Harris (2017) discusses the importance of viewing fundraising through a long-term lens, focusing on relationship-building rather than short-term financial gains.

Another difference is in the approach to strategy. Sustainable fundraising requires a proactive, strategic approach that integrates a variety of fundraising activities tailored to different donor segments, as illustrated by the Benetton model's systematic engagement process (Axelrod, 2015).

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 study's focus on technology and innovation within strategic planning was unexpected. It highlights a shift towards digital transformation in the nonprofit sector, underscoring the growing importance of technology in enhancing reach and efficiency (Te, 2020).

Relevant: The emphasis on leadership development and succession planning is particularly pertinent. As GHIF aims to foster leadership within, this insight supports the initiative to invest in leadership training and development, aligning with the organization's growth and sustainability goals (Global Happiness Initiative Foundation, 2024).

Helpful: The findings on effective communication and donor transparency resonate with our approach at GHIF. Maintaining open, transparent communication with donors is essential for long-term engagement and trust, reinforcing our commitment to these practices (Global Happiness Initiative Foundation, 2024).

These insights from the study not only validate GHIF's current strategies but also offer directions for future development, especially in areas like technology use and leadership training.

References

Axelrod, T. (2015). *Ten Minutes to Sustainable Funding*. Retrieved from [Benetton] (https://www.youtube.com/watch/XPS_nhwiVyc)

Harris, N. (2017). *Interview with Nigel Harris: Driving the case for a sustainable long-term approach to fundraising*. Governance Directions. Hartford Foundation. (2011). *Four Essential Principles of Fundraising*. Retrieved from [YouTube] (<https://www.youtube.com/watch/uy4Un5atFTI>)

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Te, N. (2020). *2020 Nonprofit Leadership Impact Study*. Retrieved from [Nonprofit Pro] (<https://www.nonprofitpro.com/promo/2020-nonprofit-leadership-impact-study/>)

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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 (Axelrod, 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.

References

Axelrod, T. (2015). *Ten Minutes to Sustainable Funding*. Retrieved from [Benetton] (https://www.youtube.com/watch/XPS_nhwiVyc)

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