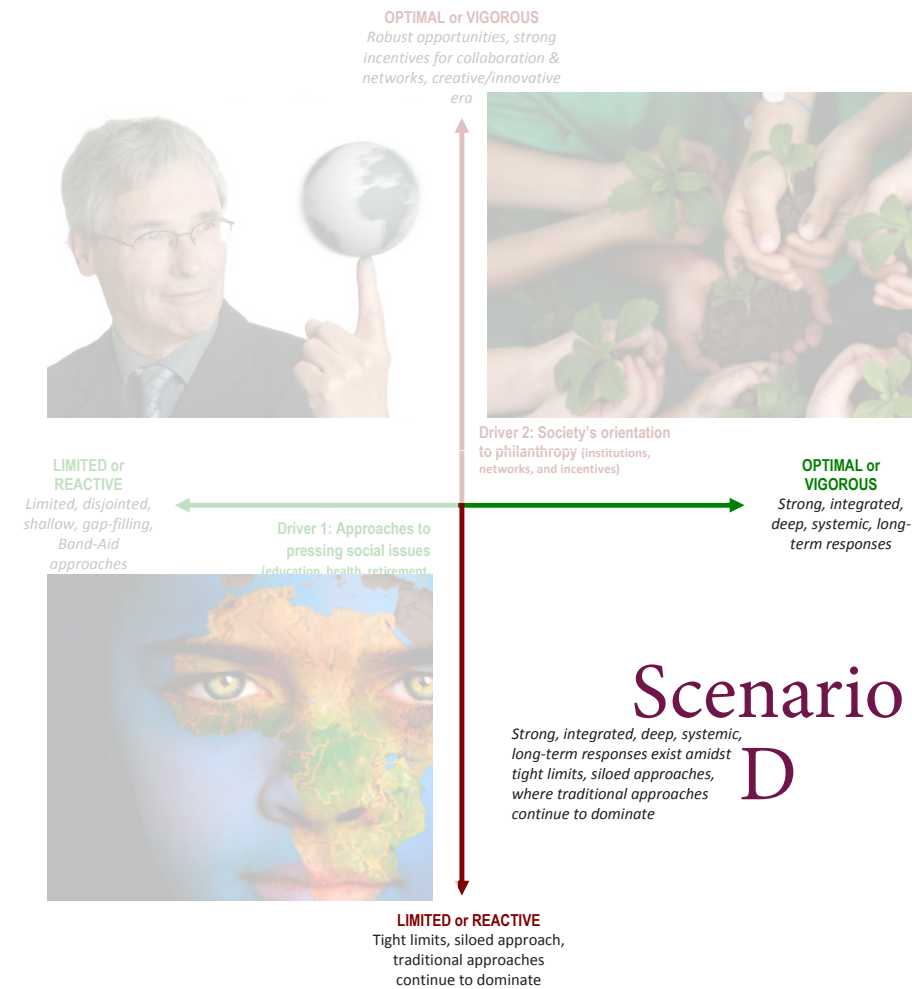


Imagining Possible Futures 2030 When Driving Forces Interact



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PARTICIPANT BIO

Elaine Martyn

Vice President of Development, The Global Fund for Women

Elaine Martyn's position as Vice President of Development at the Global Fund for Women represents the intersection of her personal and professional passions: a commitment to women's empowerment through high-level, dynamic fundraising. Ms. Martyn has lead efforts to build the philanthropic community in the UK, US and Asia. Her career has centered on the advancement of human rights through medical education, social justice, diversity policy, and advocacy using fundraising and political action. Elaine brings her experiences at Refugees International, King's College London, the British Medical Association, and Dana-Farber Cancer Institute/Harvard Medical School to the Global Fund for Women to work with philanthropists who are committed to growing its impact.

Prior to joining Global Fund, she lead the development team at Refugees International in Washington DC. From 2005-2008, she influenced the strategic vision behind King's College London's capital campaign, personally raising over \$40 million towards medical research and healthcare projects in the UK, Africa, India, Pakistan, Sri-Lanka and the U.S. She served as Head of Research Grants and Trusts at the British Medical Association and managed the work of a 20-member Board of Medical Education, crafting policy on patient rights and medical education. Ms. Martyn worked on marketing, communications, and donor stewardship initiatives at Dana-Farber Cancer Institute, the National Writing Project, and the International Institute. She has published on equal opportunities, mentorship, and management.

Ms. Martyn double majored in Medical Studies and English Literature and Communications at Gannon University, and has a Master's degree in Victorian Literature from the University of Leeds. She is a member of the Association of Fundraising Professionals, Women's Foreign Policy Group and Women in Development, and an active supporter of Planned Parenthood. Her lifelong support of women's rights, immigrant communities, and fundraising the developing world stems from her upbringing as a Sri-Lankan American and was inspired by her grandmothers who were passionate about philanthropy and education. When she's not putting the fun in fundraising, Elaine enjoys reading 19th century novels and cheering for the New England Patriots.

This is Elaine's first *GHC Conversation*.

Evolution or (R)evolution

Elaine Martyn

If the Victorian era was illustrated by industrial reform, political reform, and national self-confidence, then the current century can be framed through the lens of 9-11, social movements, the rise of Silicon Valley, and a series of economic recessions.

A third of the way into the first century of this millennium we can see a number of trends emerging. Competition, speed, and a center around the collective are all inherent to 2030. But what do these really mean? We are overwhelmed by choice. We have been told we can do anything. And now the tools are within our reach, which make communication simpler, automatic. Communication is not a skill but an inherent reality.

Over the last 20 years, a major shift has come about in terms of technology, education, and aging. The baby boomers are now in their 90s and while some diseases like cancer are preventable and treatable, age-related diseases and neurological misfunctionality are rife. Extensive work on biomarkers has been carried out but only to address treatment of symptoms, not prevention or cures. The dawn of the millennium initiated a rigorous study of genomics, proteomics, and other cellular functionality but the brain, mind, and its neurological pathways remain a mystery. Thus, people are living longer, but in many cases with some spectrum of dementia. Investment in long-term care, in functional adaptation, and in balancing expectations from care-givers (whether they be inter-family, or external) is increasing.

The movement towards integrated clinical research programs has been wholly embraced, and as a result rehabilitation physical therapy has become part of daily life, again contributing to longer wellness and higher physical functionality. There have been major philanthropic investments in capital funding for neurological research, which have been driven by self-preservationist sensibilities. This has meant a major investment into medical centers, but not into endowments. Medicine has had to incorporate alternative technologies, and the use of imaging technology has led to growth of that industry as well.

On the flip side, this increase in speed of communication, and vast improvements in mobile technology has meant that the modern generation has collective attention deficit disorder. Men and women in their 20s and 30s are used to instant responsiveness. They demand personal attention and personal adaptation. They are masters of their own path but siloed on those paths by black and white choices. And opinions are no longer static but are ever changing as new knowledge emerges.

The Yelp mobile app model of searching for a local restaurant or business that rose in 2010, translated into crowd philanthropy in the subsequent years. Kickstarter has evolved into a whole slate of crowd funding programs. What began as friends funding friends, has now

emerged into activists funding initiatives. However the modern generation are not primarily activists as much as they are re-activists. As a result, the number of community foundations has risen in comparison to the number of family or private foundations. One complicating factor is that as a result, multiple philosophies have shaped the evolution of these foundations, and these philosophies are ever changing.

An interesting phenomenon occurred in 2012, when a friend of mine launched a new company in Manhattan, called the Superman Series. It was a life-coaching program targeted at hedge fund managers, leading tech boomers, and entrepreneurs. Many of them had achieved extraordinary financial and professional success but were looking for meaning in their lives. The Superman Series was targeted at helping identify meaning and personal direction not wholly based on career. The aim was to start a program, which would challenge these 30-something year old men, who had already made enough money to sustain them for their lives, to think about communities. Naturally, the evolution of open-source technology at the same time, meant that for these men, there was a focus on the collective rather than the individual.

These men, now in their mid-50s have been for some time, a target source for philanthropic giving. But the way in which they give has become increasingly personal—linked to the journey of discovery that they experienced through the Superman Series. These 50-somethings are reminiscent of the industrial giants of the 19th century—Rockefeller, Mellon, and Carnegie. Their fortunes emerged when they were in their 20s and 30s, and they were financial leaders at a young age. They were raised in homes where one parent was in a traditional “profession,” in that I mean, those who grew out of traditional roles like doctor, lawyer, teacher, engineer and chose careers which emerged for the first time in their generation. As in the case of our Superman: tech guru, hedge fund manager, entrepreneur.

This generation is comprised of two major philanthropic communities: those who made extraordinary amounts of money in very short stints of time, and those who are the beneficiaries of a major wealth transfer from their parents’ generation.

This younger community is struggling to find what it is passionate about. Many of them feel that while their education was useful, it was also limited, and thus they have been major proponents of so-called open-source education. The education system in North America has had to change over the last 25 years. With the rise of technology and the shrinking of the media, learning has become more individualized, moving towards a learning center model, where students engage in tutorials rather than being constrained by mass-produced curriculums to achieve standardized tests. The world has become smaller – information is wholly shared through the internet and mobile technology. Laptops and tablets are things of the past. Work is primarily carried out through mobile tools. Smaller, easier to manage, faster, more efficient than those of 20 years ago. It is the Atari to the Wii, the laptop to the mobile device.

Thus, the demand for more interactive, more responsive philanthropy is growing, including through social banking. The notion of venture philanthropy, once popular has faded away to focus on investment philanthropy. There is a need for deliverables “now” as well as philosophical change. There is an impatience for movement. The CNN effect has taken hold in activism as well, and change happens rapidly, and definitively. Wars are not decades long. Models exhibited by organizations like ICG to support prevention of modern conflicts is working.

In the US, individual states have gained more power and control over community programming. This has had a major influence on green practices, and the evolution of ecologically aligned tools. For example, many buildings, particularly urban buildings which were built to survive for 50 years, now have been in existence for over 100 years. These buildings have been greened and in doing so a large investment (which was slow in developing) has finally taken hold in the ecological sector. Major investments have been made in rethinking approaches to greening—both from a consumer and a producer perspective.

Climate displacement is no longer a concept but a reality. The small island states which were threatened having negotiated with the US, Canada, and Australia for relocation of their populations, and many migrant farmers are struggling to adapt to life in these new lands. and exchange of resources and populations is common practice. Canada’s immigration numbers have grown which has meant that more consumers are competing for the same amount of product. Reliance on production of goods from Asia has increased substantially as manufacturing has been outsourced from the US completely. With this in mind, more people are mobile. There is less need to be based in one city, in one country for decades at a stretch. Movement has also meant the expansion of international philanthropic dollars into and out of the US.

There is now a larger number of women in the workforce. Many of the women who were expanding their academic degrees in the 2010s are now in the highest paying professions. They are no longer economically dependent wives, thereby fostering a shift towards funding more social causes and activist initiatives. One mechanism which has grown significantly is the notion of women’s corporate philanthropy, particularly as related to job training and entrepreneurial investment. And as such, micro-investment has evolved into macro-investment.

The university and medical institutions which were the primary beneficiaries of the majority of \$100m gifts of the past are now competing with social justice organizations, many of which emerged in the last 50 years. These organizations, which have merged or adapted in their advocacy or research scope to move towards a more vocal, activist lens have seen an influx in activity. With this influx of women leaders who come with new leadership philosophies and organizational styles, come new opportunities for engagement

in philanthropy. Leveraged philanthropy is commonplace, and intergenerational philanthropy has been structuralized. This has multiple means. Not only do families train the next generation of potential philanthropists in philosophies of giving, but also experienced funders have taken emerging funders into mentoring relationships. One example is the notion of a family university which was developed by the Galvin family in Chicago. Annually, they meet for a weekend of learning about a variety of social, political, and economic topics to influence their thinking about market trends, emerging needs in the community and their respective sectors, and where there are possibilities for them to make change through philanthropic investment. This family model has been mimicked by other small community groups to help train and influence, not with specific organizations featured, but with targeted global topics discussed.

There is a growing desire from both men and women to be more involved in volunteerism to support charitable causes for which they care. However, unlike past event organization, financial advice giving, or strategists, they are now serving in leverage roles. Donors see their responsibility not only as donors but as proponents of the cause to which they are evangelizing. However, unlike in the past where they saw themselves as needing to be equipped with information from the organization about the issues, they are now the developers of that information and the drivers of that dissemination. This shift has relied on technology but also on a simplification of knowledge sharing.

Faced with a more diverse, larger and more actively engaged philanthropic community we will need to be more culturally sensitive, and fast-paced in our responses and our development and management of relationships.

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PARTICIPANT BIO

Glenn Williams

Chief Advancement Officer, The Principia

Glenn Williams spent ten years learning development work at his alma mater, Washington State University in Pullman, Washington, where he started as a student caller in the phonathon program and left as a director of development for a branch campus. He moved to Williamsburg, Virginia in 1999 to take a position as a regional director of major gifts for Colonial Williamsburg where he befriended Thomas Jefferson, George Washington, and Patrick Henry while learning daily what it meant to be an American. He left in 2010 as Vice President of Development to join the staff at The Principia, where he is currently serving as the Chief Advancement Officer for an organization school with a pre-K through high school campus in St. Louis and a liberal arts College in Elsah, Illinois. While no direct connections have yet been established, it has been noted that the WSU football team went to its first Rose Bowl in over 60 years while he was on staff, the Americans were on the verge of winning the Revolutionary War (almost daily!) while he was in Williamsburg, and the Cardinals won the World Series soon after his arrival in St. Louis. Coincidence?

This is Glenn's second *GHC Conversation*.

Probing the Future of Philanthropy: Clinging to the Present

Glenn Williams

Development work properly executed is a game of chess; one must have the end goal in mind while constantly adjusting course as the situation dictates. Assessing each move taken is as important as the specific move itself, for without an evaluation in relation to the end result, inefficiencies can occur. As we take up the question of how differently philanthropy might look in 2030 compared to 2011, a quote from Patrick Henry seems especially relevant: “I know of no way of judging the future but by the past.”

Looking at how the development field might change in the coming years should benefit from a comparison of how it has evolved over the past twenty years. Through the lens of my own experience—which includes many conferences and training sessions attended over a quarter-century career—I can say that major and principle gift fundraising hasn’t fundamentally changed in that time. In fact, it hasn’t fundamentally changed in the last fifty years. There have been many developing theories and “best practices” instituted that appear to have improved transactional results (most specifically in annual giving). There have been numerous surveys of major donors to assess how their decision-making regarding philanthropy has evolved. Technology has brought new ideas on ways to give and with it lots of speculation on how giving will continue to change. But at its core, development has fundamentally changed little. Is that because development as a field has been slow to adapt or because there has been little need to truly adopt change?

At its most successful, development is about relationship-building in helping potential donors care about philanthropy’s work and its impact on society. So the issue is whether the external factors that are impacting the global economy and how people view philanthropy will force changes to the fundamental principles of development work in the coming years and how philanthropies should respond in order to ensure similar levels of success witnessed over the last few decades.

Defining Philanthropy

Mary Baker Eddy defined philanthropy more than a hundred years ago as:

...loving, ameliorative, revolutionary; it wakens lofty desires, new possibilities, achievements, and energies; it lays the axe at the root of the tree that bringeth not forth good fruit; it touches thought to spiritual issues, systematizes action, and

insures success; it starts the wheels of right reason, revelation, justice, and mercy; it unselfs men and pushes on the ages.¹

When viewing significant contributions of the past through this lens, I can only hope that the spirit of true philanthropy never changes.

Eddy's use of the words ameliorative and revolutionary is especially important in defining why development work is so rewarding, both to donors and solicitors alike: Well-directed philanthropy can bring major and/or fundamental changes to making a better and more tolerable world by improving, enhancing, enriching, and refining charitable efforts in society. This typically is what drives transformational donations toward non-profit organizations and causes.

Has that changed in twenty years—or even fifty years? Should we expect that this type of true philanthropy will be any different over time? The fundamental good that defines humanity hasn't changed through the ages and over the course of human events. The Golden Rule and the story of the Good Samaritan, for example, continue to be good models for philanthropic efforts. While technology, language, and professional standards may change, the basic principles of sound development-targeted relationship building has not and probably should not.

Future of Philanthropy

It is easy to say that the principles of fundraising should not change; in fact, the argument will likely be made that the effects of technology and recent events are so dramatically changing the global economy—and thus the global society—that our world will never be the same. However, in what period has that ever not been true for mankind? Every generation has made the same case throughout history. Could I possibly be proposing that the philanthropic world continue to perform in a “business as usual” manner without evolving significantly to changing circumstances? Yes and no.

According to the National Center for Charitable Statistics website, more than 1.6 million non-profit organizations are currently operating in the United States supported by nearly \$291 billion in contributions. Philanthropies should exist to improve society and the sheer numbers would suggest that there are a lot of niches being filled by non-profit groups. Funding to support these huge numbers is likely coming through time-tested fundraising techniques that can be transferred from one organization to another. I am confident in saying that the vast majority of major gifts made to these organizations did not come to fruition by a clever marketing campaign, slick mailing, technological breakthroughs, or from evaluating donor surveys but came rather through donors—over time—becoming so

¹ Mary Baker Eddy, *The First Church of Christ, Scientist and Miscellany*, p. 287.

familiar with the goals and needs of the organizations that they became emotionally, intellectually, and financially engaged.

Is there any reason to believe that this won't continue to be true of future transformational giving? From that standpoint, my recommendation would be that organizations continue to hold to the tested and true spirit of donor-prospect relationship building as the core of their major gift efforts.

Adapting to Societal Changes

Where organizations should be prepared to change and adapt is in assessing first their very cause for existence and second how much they depend on transactional giving.

As societies' needs are shaped by ever-changing economic, legislative, and social mores, specific needs that were once important may no longer be relevant. The reverse is also true, that evolving challenges will create new opportunities to serve society's needs. If one accepts the premise that non-profits are created to fill a niche, then they should only exist as long as that particular need exists. Sometimes closing one's doors is just what is needed. In some cases, organizational existence loses its ideological roots and becomes less about fulfilling needs and more about holding onto jobs and a perceived sense of relevancy. The greatest leaders are those who think not about self-preservation for themselves or their organization but what societal benefit their work is fulfilling. They are considering whether other organizations are doing similar work and perhaps doing it better, more effectively, and more efficiently. Is the cause for creation still relevant to the purpose for existence? Too few take this view, but how remarkable the result when it happens. Sincerity and integrity are important to this analysis.

Convinced of one's organizational validity, leaders need to assess their field of "competition" and consider ways to collaborate with like-minded institutions. While a few mergers have made the news, in 2009 the Charity Commission revealed that just 9% of charities had considered collaboration as a strategy.² By 2011, the National Council for Voluntary Organisations (sic) in London found that "three in four charity leaders were expecting to collaborate more with others in the next year." Mergers can occur for a number of reasons, but two important considerations according to Andrew Cole are generally a growing overlap between organizations that duplicate efforts and the desire to increase political clout. While perhaps slow to merge organizations, a growing trend has been to form consortiums that can help boost capacity, knowledge and skills.³

Economic circumstances could likely speed up the pace of mergers in the coming years if revenue sources continue to decline through traditional methods. Even if economic circumstances don't improve, more organizations should be looking at comparative work

² Andrew Holt, *Charity Times*, 09-18-09

³ Andrew Cole, *The Guardian*, 04-21-2011

by other philanthropies as the chance to improve services overall for the good of serving humanitarian needs, not just to strengthen bargaining position or the bottom line.

The Age of Possibilities

If this is the present reality given the current economic environment, what might be expected twenty years from now? Returning to Mr. Henry's quote, the past would suggest that given its cyclical nature, economic circumstances are likely to improve over time. How would that affect the pace of change and adaptation if broad revenue streams were once again made widely available? Collaboration and economy are typically driven by necessity. It is reasonable to expect that within a twenty-year window—in the United States at least—economic prosperity will return. Will this mean a return to the old ways of doing business or will philanthropies have learned from recent experiences how important it is to be nimble, collaborative, and responsive to evolving societal and economic circumstances in order to respond to humanity's and donors' needs?

It is reasonable to expect that as the world's governments deal with continuing—and even growing—pressures surrounding hunger, education, immigration and border issues, social justice, health care, employment, and retirement benefits, organizations will continue to rise with potential solutions. Governments will continue to be pulled on one side to reduce spending to meet deficit challenges and on the other an increasing demand for basic human needs such as food, shelter, and education. Charitable organizations are finding themselves meeting needs that not long ago were viewed as fundamental governmental responsibilities. The constant challenge for any philanthropic organization will be how to engage potential donors—who are increasingly sought after by more and more philanthropies—to a point that they are willing to invest at levels necessary to meet serious societal needs. This challenge is exacerbated by the fact that these potential donors who can make the biggest impact are likely completely removed from the challenges themselves due to their wealth and status.

The most effective method for encouraging the needed transformational giving is personal face-to-face connections. This was true during the last century and will continue to be the case in this one. Technology may be able to deliver the mechanisms to generate interest but it is personal connections that create the trust necessary for significant investments to be made. But it is also the most expensive method of fundraising, requiring substantial investment in staff and travel.

Reinforcing the Tried...and Most Effective

In these attempts to develop future scenarios, it is challenging for the human mind to conceive of rapid change in a way that can consistently predict the future accurately more than a few years out. Early quotes about the future of computing from the renowned experts at the time are a perfect example. A personal favorite is Thomas Watson, Chairman

of IBM in 1943, who said “I think there is a world market for maybe five computers.”⁴ Prognosticators abound in our society on subjects such politics, sports, world events, the weather, investments, and the future of philanthropy, but how many truly analyze the success of these predictions? It is important to speculate and plan, but it is just as crucial to analyze justly; the new and shiny thing is hard to resist but the tried and true—and ultimately most effective—has a crucial place in our work. It is extremely challenging to predict the distant future with reliable accuracy so it makes sense to reinforce what works even while experimenting with new ideas.

Mary Kimball Morgan, founder of The Principia, a school in St. Louis, highlighted the importance of right thinking in this activity when she said in 1927:

In this day of rapidly changing ideas and customs, the man or woman who persistently adheres to established convictions is regarded as old-fashioned and unprogressive. And it is sometimes quite difficult to discriminate between a rigid adherence to one’s habit of thought and a firm stand for Principle...There is only one way to act with decision and discretion in these matters, and that is to consider not what others are doing, but what wisdom dictates.⁵

The human experience is a pendulum, swinging from one extreme to another, generally driven by reactions to circumstances, fads, trends, and anxiety. In between the extremes is a common ground in which effective results tend to be derived from calm, realistic, and longer-term thinking. When determining where organizations should be investing most heavily in the future to secure transformational resources, it will always be wise, in my opinion, to invest in highly capable, sincere staff who have the ability to personally convey with passion how their organization is addressing specific, important needs of society. The human and humane touch will continue to garner the best results. It will be those who best understand the donor mentality that will be sure that “new and improved” tools meet their donors’ needs.

⁴ *The Kansas City Star*, Jan. 17, 1995

⁵ *Education at the Principia*, The Principia Corporation, 2004

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PARTICIPANT BIO

Joseph M. Zanetta, J.D.

President, Providence Little Company of Mary Foundation

Joseph M. Zanetta, J.D., is the President of the Providence Little Company of Mary Foundation, a not-for-profit, integrated health care system comprised of more than 25 health care sites throughout the greater South Bay, Harbor and Palos Verdes Peninsula communities of Southern California. A member of Providence Health & Services, the organization has five medical centers throughout Los Angeles County. Zanetta was appointed to the position in December 2001. He recently concluded the foundation's most ambitious fund raising effort to date – the successful \$50 million Legacy Campaign.

Zanetta has over 25 years of experience as a fundraising professional. His career has included leadership and fund development responsibilities as:

- Vice President for Advancement, Whittier College;
- Executive Director Planned Giving; and Executive Director, Office of External Affairs, School of Business Administration, University of Southern California;
- Director of Development, Belmont Hill School;
- Director, West Coast Regional Office, Cornell University.

Zanetta received his undergraduate and law degrees from Cornell University located in Ithaca, New York, and is a member of the New York State Bar. He is active in many civic, professional and community organizations. He is Chairman of the Board of Holy Family Services Adoption Agency, member of the Board of Directors of the Robert H. Jackson Center and a member of the Board of Regents at La Salle High School. Zanetta has served as Chairman of the Pasadena Enterprise Center, and was a long-time member of the Council for the Advancement and Support of Education District Board. Zanetta is a well-known speaker on philanthropy and consults with non-profit organizations in fund raising and board development. He has been interviewed on topics related to charitable giving and philanthropy in the Los Angeles Times, Washington Post, American Benefactor, Dallas Morning News, Pasadena Star News, and Whittier Daily News. A resident of Altadena, California, he is the proud father of sixteen-year-old Samuel Leggett Zanetta.

This is Joe's third *GHC Conversation*.

Sofia

Joseph M. Zanetta

Nearly a year ago, my neighbors approached me with some questions about adoption. They knew that my then seventeen-year old son Sam was adopted, and they were trying to figure out how to go about adopting a child. Tim and Ana had an adorable four year old boy who was born the old-fashioned way, but despite their best efforts, they had been unable to conceive a second child. Over dinner one evening, I gave them the download on adoption.

Sam was adopted in 1994 after Ellen and I explored the world of fertility, attorneys, and surrogate motherhood. We learned that the best success in obtaining a child is to affiliate with a licensed adoption agency that provides counseling to young birth mothers. I guess we became poster children for a successful adoption, as Sam has developed into a fine young man, outstanding athlete, student leader, and kind neighbor. Ellen and I have both served as board members of the adoption agency which has also been the recipient of our philanthropy.

Tim and Ana learned that I was the chairman of the board of directors of this non-profit adoption agency – Holy Family Services – and that we were affiliated with the Episcopal Diocese of Los Angeles. In the spring of 2011, the Episcopal Bishop of Los Angeles, Rt. Rev. J. Jon Bruno, hosted a fundraising tea for Holy Family Services at his home, and Tim and Ana attended as my guests.

As a result of that event, Tim and Ana began the process of adoption. On New Year's Day 2012, I was busy preparing for my annual neighborhood open house when Tim barged in and said "We are going to have a baby! No – we had a baby! Last night! The birth mother picked us!" Sofia arrived in our neighborhood a few days later – an adorable seven pound bundle of joy – and is beginning her life journey, under the watchful eye of me as the honorary Godfather.

I will tell you the world in 2030 according to Sofia, who will be entering college in the fall of 2030. The parallels with my own adopted son are amazing, in that going back to 1994 Sam began his eighteen year journey.

So what will the world be like in 2030 for young Sofia? Sofia lives in Pasadena, and most parents (including me) have avoided the public schools because of concerns about crime and educational content. In 2012, many of the efforts of civic leaders in Pasadena focused on improving the quality of the public schools. The Pasadena Foundation over the years from 2012 – 2030 was incredibly successful in securing hundreds of millions of dollars from private sources to replace the aging plant and invest in training and recruiting outstanding teachers. Sofia attended the public

schools (unlike my son) and was fortunate to receive an outstanding education. My son attended private elementary and high schools, including a private college from which he graduated in 2016.

One of the largest philanthropic organizations in California in 2012 was the California Endowment. Despite a reduction in the value of its endowment during the economic recession of 2008, the endowment rebounded to reach ten billion dollars in 2030. One of their signature programs in 2030 is to encourage children who represent the cultural mosaic of California to attend high quality colleges. Sofia, born of Guatemalan parents and raised by a white father and Peruvian mother, certainly qualified for this highly regarded program. Sofia received a full scholarship to attend the University of California at Berkeley, one of the country's most well-regarded public institutions.

In 2012, publicly supported institutions of higher education were struggling with massive budget cuts. That was just as the California Governor embarked on a program to change the tax structure of the Golden State which had become tarnished due to Proposition 13 and the subsequent reduction in tax revenue. Through courage and the bully pulpit, Governor Brown was able to convince the public and the legislature to repeal Proposition 13, and revamp the tax structure. As a result, Berkeley and the University of California, which faced billion dollar reductions in 2009 – 2012, were the recipients of this windfall of new tax revenue. Billions of dollars were invested to restore the University of California to the pinnacle of higher education in the nation and indeed the world. Sofia will be entering the University of California – Berkeley – on a full scholarship, and will be attending a school that has managed to replace the aging baby boomer faculty members with a new crop of scholars. Berkeley continues to have Nobel laureates on the faculty, a diverse student body, and outstanding facilities in 2030.

The realignment of the California tax structure was a reflection of the federal government decision in 2013, at the start of the second Obama Administration, to overhaul the way the internal revenue service functioned. After a hard-fought re-election campaign, President Obama shocked the political establishment by asking defeated GOP presidential candidate Mitt Romney to serve as Secretary of Treasury. This “coalition” government, based on the European model of placing opponents in your government, resulted in a complete and total overhaul of how taxes were assessed and collected. The national flat tax, championed by Treasury Secretary Romney, was endorsed by both political parties, and resulted in a huge increase in federal receipts and in productivity in the private sector. Tax loopholes were eliminated and the resulting tax structure generated universal support. Waste and inefficiency were also largely eliminated from federal programs.

Sofia, who was actually born of “undocumented citizens,” became legal when she was adopted. This notion of becoming a citizen was also changed in the second term of President Obama, when he granted amnesty to all undocumented citizens in the United States. At the same time, he secured the borders so that people from foreign lands had to meet new requirements to enter the country. This combination of accepting those who came “illegally” and putting up a harder set of rules and protocols for new immigrants received the support of the House and Senate.

Sofia will have her health care needs met because she is part of the universal health care that was adopted by the Congress fifteen years ago. Once the U.S. Supreme Court upheld the main requirement of Obama Care – that the government could mandate citizens to have private health insurance – the opponents folded and national health care became a reality. Sofia will be covered for the rest of her life – and will not have to worry about an employer providing her with health insurance.

The economy of the country in 2030 has withstood challenges based on changes in consumption patterns. After the recession of 2015, most companies converted their basic corporate structure to become a public benefit corporation. This movement began in California in 2011, and helped companies balance the needs of the employee, the consumer, and the community, rather than merely focus on shareholders and profit. By becoming more attuned to the consumer and the community, corporate America was able to undergo a radical transformation, similar to the industrial revolution.

Similar to the changes that took place in the late nineteenth century when the industrial revolution took place, the economy of 2030 represents a blended approach of traditional with new. The arguments about the top one percent of the population controlling most of the wealth have been addressed by this new form of corporate governance. While traditional profit incentive is not an evil notion and in fact is the basis of democracy, the notion of people owning a greater percentage of the wealth is something that has been encouraged by government and corporate leaders. The economy of 1970, when restructuring was occurring to deal with the movement to technological driven companies, saw the development of employees owning businesses. This new form of corporate ownership is based on the fact that companies owned by their employees saw a huge increase in customer satisfaction, employee satisfaction and indeed profits. In 2030, the profits are shared widely and not concentrated in the hands of a few.

The greed that caused so much disruption in the financial markets in the 1930’s, the 1970’s and during the recession of 2008 was eventually replaced by a much more egalitarian approach to wealth creation. The United States is still the beacon of democracy and capitalism where all have a chance to be successful. But rather than

concentrate all land and goods in the hands of the government – a Lenin-like approach – instead wealth was distributed so that all can participate.

As Sofia enters Berkeley on her full scholarship, she will have the knowledge that the world is at a better place than when she was born. Unemployment remains below 5%, the nation offers new college graduates opportunity to engage in public service, and the corporate world is anxious to hire new bright minds. The traditional approaches of philanthropy, business, helping your neighbor, and the social contract continue to operate but in a somewhat modified conceptual framework. Citizens continue to have the freedom and flexibility to pursue their dreams but in the context of a stronger economy and world order.

Gary Hubbell Consulting *Conversation* 2012



PARTICIPANT BIO

Marv Baldwin

CEO, Foods Resource Bank

Marv Baldwin has served as President and Chief Executive Officer of Foods Resource Bank (FRB) since February 1, 2005.

"In Marv Baldwin our search committee has found just the individual FRB needs to make our Christian response to world hunger achieve its growth potential," said Susan Ryan, past chairperson of FRB's board of directors and chair of the search committee. "He is a young man of vision and strong spiritual values. At age 39 he has the leadership ability, integrity, energy, business experience, and passion to drive FRB's impact on world hunger for many years."

FRB, a faith-based non-profit organization, funds overseas food security programs ("helping people from the world's poorest villages feed themselves") from the sale of crops raised by U.S. community growing projects. Smallholder farmers and their families move toward food independence with dignity, while American volunteers, motivated by a desire to help others, discover that working together for a greater purpose enriches life in their own communities. Marv's initial experience with FRB was as a growing project leader.

Prior to joining FRB, Marv Baldwin was a district sales manager for Nalco Company's water treatment technology, where he excelled in achieving organizational goals and proved himself a skilled leader and team-builder. He is a dedicated volunteer himself, and knows how to motivate others to do the same. Wherever he and his family have lived, they have been fully involved in local church life and community-improvement projects. While living in California, Tennessee, and Illinois, Marv spearheaded fundraising and community outreach efforts—whether to build a new church or restore an old one, whether to rebuild a child development center or organize community growing projects for FRB. He views his assignment with FRB as an opportunity to do more of the same, but with national and worldwide impact.

A graduate of Hope College in Holland, Michigan, Marv resides in Western Springs, Illinois, with his wife Amy and their three children.

This is Marv's fourth *GHC Conversation*.

A fictional story...

Missed Opportunity?

Marv Baldwin

January 30, 2030

Budd considered many things that morning as he waited in his office for security to escort him out. He thought the news seemed much the same as it had for so many years. Sure, new names, new faces, but it was largely the same. After more than two decades of delivering the news over radio, television, and the internet Budd was both jaded and on his way to early, forced retirement.

Budd couldn't be sure what the truth was anymore. He'd taken this path early on trying to uncover the truth and do his part to seek justice through his reporting and writing. What was the truth? In the early years he thought he knew, he assumed his desire for equality and justice for all could and should win the day... now, he wasn't so sure.

Back in 2008, Budd was a young man from an upper middle class family who knew that his life was an opportunity to make a difference for others. He would use his position to make a difference, he would not be bought. He saw so many go down the path of accumulation and materialism in the face of worldwide unrest, hunger, and poverty. It bothered him and at a level he knew things ought to be different.

In the early part of his career, Budd was thrust into the big housing bubble aftermath and economic malaise of 2008-2010. At the time he couldn't understand what everyone was so upset about. He figured he was too young prior to 2008 to really understand just how good things were. Back in the day, as he was told, a person could get a home loan with nothing down, and even get some cash back to buy a flat screen - he laughed thinking about those ancient flat screens and how people used to worship them.

Budd realized now in 2030, at the age of 49, that although he had never been more confused, he felt both frustration toward the establishment and a real hope pouring forth from communities all around the world, making a difference locally, despite increasingly out of touch organizations and institutions. Sure there were a few organizations that seemed to get it, but most were just trying to ensure the deck chairs were perfectly lined up... prior to the sinking....

The good news is that many people at a local level could see how lost big organizations and institutions had become. The problem was there just wasn't much anyone could do about it. Budd harkened back to the discussions in 2009 about "too big to fail" and realized in hindsight the breadth of that problem beyond banking....

As George entered his office with that "I told you so" look on his face, Budd recalled George's prophetic words about the increased need for workers in Europe and N America by 2030, and now the flip that most people had made to not only embrace immigrant workers, but for some specialty jobs to even pay a bonus for coming to work in the first place. Ironically, Budd's digging for the truth to bring about justice for people in difficult situations and to help those less fortunate had not only sealed his fate at CNNMS-FOX news but now, his job was going to go to a young woman who had grown up in a difficult situation in the DRC. The network believed that Philomene would be so grateful for the good job that she would just fall in line but Budd knew better. Philomene had known war, famine, rape and injustice and knew that speaking up against the status quo was critical to creating justice. Philomene would soon be "reassigned" as well. Budd thought it almost funny that his work to bring forth the truth had actually offered someone else a chance...

George was there to offer his condolences, in a sense. George had long been one who spoke his mind and spent much of his time thinking, writing and reporting about the future. George and Fred, the other key person in the metrics office, had both predicted some interesting stuff back around 2010. George's predictions about Turkey, Mexico and Japan rising certainly seemed to be coming true and the re-emergence of Russia for a time and now gone again gave him some real credibility. Fred's discussions about population growth slowing and halting due to women's education and the ability to access birth control was amazingly accurate. All the Mathusian predictions about population growth, once again, debunked. With a world population at 8.3 billion now, it seemed likely that as the population topped nine billion in about 20 more years it could conceivably begin contracting. Wow, what a mental shift we will have to make at that point in time!

George came forward, shook my hand and wished me well. I picked up my personal items and as I looked up noticed the official CNNMS-FOX escorts to see me to the door. I thought it a bit odd that George had come to see me off, although I was appreciative that he had stopped by. I knew others would be reluctant to jeopardize their role even though there was a rumor that the network was going to need it's third bailout to keep the doors open. The network had been careful reporting about the current administration. I was fairly certain the bailout would shore up the status quo for at least a few more years.

Suddenly in my mind I was recalling a brief conversation with my neighbor Daniel. He had accosted me one day as I arrived home several weeks ago. He was all fired up about a new "unofficial" community group in the neighborhood that was beginning to publish the patterns that large institutions and corporations were using to keep people in line through what Daniel called level 1 thinking. He and I had had enough conversations over the years that he knew that although I worked for an entrenched big organization, he said he could tell I had the capacity for what he called level 2 thinking. As I thought about George's visit to say goodbye, I realized that he had also been able to suspend his reactive state to avoid me knowing that as a key member of the metric team, he could apply some new measures

to anyone who gave him a hard time. George had commented many times that his love of predicting the future and being candid about it was only due to his position in the "metric bunker"... lots of measurement folks in big organizations have long term contracts. It's ironic that CEO's and other Execs in their desire to grab more control through measurement, in most cases, have created a powerful and misleading rudder in their own organizations.

As I was escorted down the long hallway toward the elevator I was struck by the glass walled offices and cubes which were a facade to transparency. As we neared the elevator, I thought about many things. Mostly I thought about how the establishment, big businesses, government and large philanthropic organizations missed opportunities that could have been embraced 20 years ago in so many areas of our society and world. I considered how different it might have been had big organizations and institutions taken the time to learn from grassroots organizations. Clearly, local efforts in all sectors were going well but local effort was a threat to the establishment, thus two sides had formed. For people like me who saw the value of both large, well-run organizations, and grassroots efforts blended together, the thought of where we are versus where we could be is defeating.

As the elevator doors opened, I realized that Jane Jacobs who was recently promoted, was also being escorted out! Then it hit me, a promotion out of the metrics department, although freeing, was often the kiss of death. Jane gave me a look that showed her peace about the situation. Jane had long been predicting a coming dark age, where culture comes to an end ... in a sense we were seeing that end but also a new beginning of sorts ... just as Jane had said. With our escorts, we all entered the elevator together and joined Alaric, the head of security. It was rumored that he was denied a promotion recently that everyone thought he would get. Although his normal look was serious, there was a certain darkness that he carried today which gave me the creeps. I had a moment of panic as I imagined what unthinkable torture might lay before me. I gained my senses realizing that my mind was reacting to his mood in combination with my viewing of Mission Impossible 20 last night starring Justin Bieber, yeah who would have guessed it! I calmed myself as we went past the 14th floor. My reaction reminded me of a recent story our health editor did on escalating anxiety and depression levels in our society. Much of the story revolved around the advanced treatments which are supposedly available to everyone. Health care may still be a right but like the Snapped Up food security system, as soon as you're honest about what's going on in your life, you may be denied.

From 14 down through 7 we passed the centralized admission offices for the Ivy League. I looked over at Jane recalling her comments about how our education system had become more of a credential production facility. Word on the street was that people with advanced degrees were often thought to have been programmed by "the system" and thus many people were "simplifying" their resumes so they could blend in with grassroots society.

As I was escorted toward the doors, I again noticed the "Tebow for President 2032" and "Chelsea Clinton for President 2032," it seems a bit early for that. I thought about my recent proposal to do the story on the tip I had received about Rove, Ploeff and Axelrod working together to ensure a status quo situation. I had a great title for the story "The Rise and Fall of the Republicrat Party." I recalled back to 2012 when it was reported that Hungary's constitution was rewritten in a way that the ruling party could never be removed from office. At that time it appeared we had two parties, but ultimately people have discovered over time that there are in fact two groups. The two groups are not separated by democrats and republicans rather, those groups are divided into those in the status quo and those who aren't.

... My mind wondered as I thought about the challenge of an aging country and legal system ... those who originally made the laws did so with a deep knowledge and ownership in our case ... both of balancing democracy and republic as well as taking into account human nature and all that can go wrong without some structure and rules. Here approximately 250 years after our founding, our country is led by people who have inherited the laws ... which has eroded ownership... just like we often see in business's and philanthropy... nepotism in its various forms can create some serious problems...

Suddenly, I was outside ... sensing both relief and panic.

"What now?" I thought. I began walking... looking around at the buildings. I decided to call home. Sutton would certainly be supportive, but in a sense, this loss of work fulfilled one of her biggest nightmares. How would I say it? For the moment I didn't need to worry about it as my communicator service had been cut off... Should have thought of that... Guessing my access to ecash will also be frozen for a while... Should be a challenge getting home... Funny time to be hungry... Might as well try the ecash chip... As I waved my hand across the scanner to pay for the panini, the sign said "contact bank for further information." "Damn, I knew it!" All of a sudden a guy said "here you go" and waved his hand, "thank you JK" said the scanner. "Thank you JK" I said. "So you finally pushed the envelope past the status quo did you?" I looked at him in disbelief realizing the stories I had heard were true. "Yeah, we knew it was a matter of time for you... George called earlier and we figured you might be here once your finances got cut off. Here, want to call Sutton?" Now I was freaking out inside yet trying to be calm on the outside. We were joined by two other guys, Eckardt and Brian. They were all smiling kindly. I took a deep breath and we began walking together.

They in turn began to share stories of things I had only heard rumors about... Groups of people working together locally, often clandestinely to improve their communities. They told me stories of people teaching each other agriculture, health practices, technology, humanities and art. They spoke about the new underground railroad in a sense helping people move to freedom... "no more status quo sheeple" they said and then nodded. Oh it is not easy for people in many ways but many have realized the lack of living they had been

doing in our professionalized, corporate, linear thinking, marketing oriented society... Millions have realized that economics is only a piece of the puzzle and far too many people, especially those who have political and economic power are trapped by their own resources. The energy and creativity released by this realization, they said, was empowering a whole new way... New networks were taking the place of dated institutions, people were using their skills and abilities to invest in the future of communities, people were doing things to grow food locally, finding ways to help people access medical care from uncredentialed experts, and educating one another in small groups and one on one mentoring. The lack of institutional efficiency was certainly made up for by the energy, creativity and ownership exhibited by so many people in so many ways.

I asked why with the majority of people working to be "off the grid" in a sense that our leadership has not turned over too? Their answer was simply... Duostat rather than monostat. In other words, people in the status quo will do anything in their power to maintain that control. Many are not even conscious of their level 1 drive to do it. They are reacting to their primal instincts, their desires to keep things constant in an ever changing world, their desire to create their "own space " or "own thing" in a world where we are all connected, and they are reacting to their immediate needs rather than working to delay gratification... for the betterment of all.

... I thought back to the many conversations I have had with farmers over the years... many U.S. farmers told me how our revered ag sector in the U.S. was slowly slipping away. As with so many other sectors, consolidation had led to a depersonalization of what had once been a family and community effort.

Surely I had thought that the many upstart farms and community gardens were making a big difference, and now I was hearing first-hand the difference it is making! ... but the conflict created between local efforts and macro level policy solutions are making long term success a battle of wills. I even recall hearing a story that some supposed "persons of interest" (a more pc way of implying one might have terror connections) have been detained in a suburb of Chicago because they were trying to grow their own food to become independent from the system. They went so far as to raise chickens against their local village's ordinance. I'm sure the charges won't stick but I'm not surprised the concentrated control of institutional power has led to trumped up charges about terrorism in order to keep people in line. Yet another effect from our desire for security over freedom from 911.

My hope that those who are working toward grassroots solutions in the midst of all this struggle are strengthened and encouraged. Ironically, lasting strength is often only built through difficulty and suffering.

Had the Philanthropic community embraced this grassroots path in 2010, who knows where we might be today. There existed the potential of working together, blending both systemic, corporate, institutional solutions with grassroots, organic, messy, solutions and approaches. In fact, with a growing world population and geopolitical issues, it appears that sort of blending would be preferable....

Society as a whole missed the chance to broadly embrace organizational, community and individual assets, gifts, and viewpoints. Many, in fact most, philanthropists who had and have the financial wherewithal to think long-term; to see the oneness of all of us; and to embrace complexity, took the "road more traveled" - that of separateness and the facade of simplicity - and ultimately missed the chance to be the catalyst for change we most needed.

Fred Pearce wrote *The Coming Population Crash and Our Planet's Surprising Future*

Abhijit V. Banerjee and Esther Duflo wrote *Poor Economics*

George Freidman wrote *The Next 100 Years*

Brian Taylor wrote *Becoming Christ*

Henri Nouwen wrote *With Burning Hearts* and has written many other books

Parker Palmer has written a number of books and articles

Jiddu Kirschnamurti wrote *Total Freedom*

Eckhart Tolle wrote *the Power of Now*

Richard Rohr wrote *On the Threshold of Transformation*

Rick Hanson wrote *Buddha's Brain*

Tim Ferriss wrote *the Four Hour Body*

Daniel Kahneman wrote *Thinking, Fast and Slow*

Thomas Merton wrote *Contemplative Prayer*

Diane Winston wrote *Fully Present: The Science, Art and Practice of Mindfulness*

Nassim Nicholas Taleb wrote *Fooled by Randomness*

Jason Saul wrote *The End Fundraising*

? wrote *the Cloud of Unknowing*

Jane Jacobs wrote *Dark Age Ahead*

Gary Hubbell Consulting *Conversation* 2012



PARTICIPANT BIO

Shari Lynn Scales, CFRE

Inspiration Architect, Providence Cancer Center

Had scenario-based planning been the tool of choice over Meyers-Briggs in 1992, not even Shari would have guessed that two decades later would find in her an impassioned development catalyst raising principle gifts for mission-centered work.

A stable career that spans 14 years with Legacy Health System, three with the Oregon Province Jesuits, 9 with Providence Health & Services, and 3 in higher education, have found Shari firmly replanted with the organization whose “moment” she attributes as one of the greatest and most impactful of her career – completing the campaign that led to the opening of the nation’s first Gold LEED certified hospital – Providence Newberg Medical Center. In January 2012, Shari returned to Providence to serve in an instrumental role she fondly and appropriately calls Inspiration Architect for the Providence Cancer Center. Working alongside accomplished and world-renowned researchers Walter Urba, M.D., Ph.D., Bernard Fox, Ph.D. and others positions Shari in a cataclysmic role to invite change-agents to be part of the next steps in revolutionary cancer research that focuses on one’s own immune system to fight the deadly disease. Shari’s brief break into higher education leadership roles at George Fox University (Newberg, Oregon) and Concordia University-Portland (Oregon) crystalized her true philanthropic passion—serving the poor and vulnerable as they navigate health crises and helping to provide hope and courage to beat the disease through clinical trials and integrative medical approaches.

Shari remains indebted to early mentors in her development career -- chief among them, Gary Hubbell, with whom she is honored to once again be seated at the Conversation table. She continues to weave, balance and integrate her family into her profession and is proud to have watched her sons D.L. (9) and Diego (4) experience joy in serving others and along with her husband of 13 years, Dwayne, work together as a family to leave the world a much better place.

“This is the true joy in life -- being used for a purpose recognized by yourself as a mighty one... I am of the opinion that my whole life belongs to the community and as I live, it is my privilege, to do for it whatever I can. I want to be thoroughly used up when I die, for the harder I work the more I love.

“I rejoice in life for its own sake, life is no brief candle to me, it is a sort of splendid torch which I’ve got a hold of for the moment and I want to make it burn as brightly as possible before handing it on to future generations.”

—George Bernard Shaw

This is Shari’s fourth GHC Conversation.

The Summit of the Six

A scenario exploring North American philanthropy in 2030

Shari Lynn Scales, CFRE

The players...

The Senator
The Scientist
The Survivor
The “Sibling”
The Strategist
The Seer

The Scene...

It's 4 am. The Senator rises from a disjointed night's sleep, pausing with hand on chin to reflect on the day's coming agenda. Having edged a win in the last election, his second term has not been an easy one. The Medicare refueling and enhancement legislation he fought hard to pass last term, along with his party constituents and the President, failed miserably. The son of a medical doctor, and having lost Amy, his wife and the mother of his then two young children to a rare form of breast cancer, the health care agenda weighs heavy on his mind and heart.

It was never about the politics, never about the spotlight. It was for Amy, Brendon and Holly. It was for the sake of their brighter future.

Remembering the eagerness with which he took the Scientist's call, his thoughts returned to the agenda of the day. Finally, the two would meet and via multi-live Skype, join in conversation with the Survivor, the head of The Siblings, and two business leaders, The Strategist and The Seer, about the latest medical breakthrough.

The Setting...

Tighter restrictions on lobbying and the continued silos in which corporations, schools, non-profit organizations and the government operate have made it increasingly challenging to have strategic conversations and this was no exception. But the issue at hand could no longer be ignored. Today could mark the long-awaited turning point for the Senator and his committee to push through vital health care reform that would reallocate much needed funding from regulatory bodies to health care treatments and cures.

The Scientist and his team of researchers and medical doctors have operated their labs and clinical trials on the wings and prayers of time-delimited grants for decades – some more generous than others dependent on investor reactions to the roller coaster market that has

not let up since the early 2000's. Despite unpredictable funding, results of the latest clinical trials continue to be astonishing. Large tumors once dominating entire regions of the skull are disappearing, never to return. Enlarged, cancer-filled lymph nodes are shrinking back to their normal cancer-free selves...for good. The works of protein distillation and antibody markers begun two decades earlier have made significant impact on a select, and unprecedented, population of cancer patients: those diagnosed between the ages of 29 and 40.

It is the year 2030, and cancer remains the second most common cause of death in the United States, exceeded only, still, by heart disease. As well, the global burden of cancer has continued to increase largely because of the aging and growth of the world population alongside an increasing adoption of cancer-causing behaviors, particularly smoking, in economically developing countries. Breast cancer continues to be the most frequently diagnosed cancer and the leading cause of cancer death among females. Lung cancer remains the leading cancer site in males.⁶

Through the collective group's research and experience, everyone who will soon be arriving to the Summit's virtual table knows that cancer survival depends upon a combination of early versus later stage diagnosis as well as access to timely treatment. They also embrace the notion that a substantial proportion of the worldwide burden of cancer could be prevented through the application of existing cancer control knowledge and by early detection and treatment, as well as through public health campaigns promoting physical activity and a healthier dietary intake. In earlier virtual conversations, the Senator and the Scientist have agreed on the idea that clinicians, public health professionals, and policy makers should join forces to play an active role in accelerating the application of such interventions, and now, cures.

Because of the continued divisive way in which the government is run (party lines remain drawn and clear) and because of continued tight economic times, philanthropy occurs and has grown through increasingly non-traditional means. Economic constraints have pushed strategic and educated leaders into positions of responding to and taking action on societal issues like homelessness and health care, on their own. The number of private investment and giving circles has continued to grow, harnessing the minds, hearts and resources of people of influence and affluence in a collegial fashion, mainly through mobile cam web groups, to respond to and support basic needs that government alone cannot: hunger, health care and primary education to name a few.

⁶ Source: CA: *A Cancer Journal for Clinicians*; Volume 61, Issue 2, Article first published online: 4 FEB 2011; American Cancer Society, Inc.

In 2012, the Bill & Melinda Gates Foundation paired with the Canadian government to develop a real-life “tricorder,” the hand-held medical device that “Star Trek” doctors used for diagnosing.⁷ The nearly \$32 million in grants made to 22 researchers around the world paid off and now, new patients from around the globe are quickly diagnosed and can participate in these clinical trials. But only with a significant boost in private funding.

The Leading Role...

One of the key groups in today’s Summit, and the events leading up to it, are The Siblings – a group of clinical trial “alumni” who share the common bond of survivor. Now in their late 30’s to early 50’s, these once “millennials” are at the peaks of their familial and professional lives. The busy-ness of parenthood and workplace ministry has not slowed. There remains a struggling middle class sandwiched between the poor among us and the “have’s,” and this generation works hard to close the gaps but can’t amidst the silos and political rhetoric. Yet this generation has emerged with the strongest voice, continuing to lead virtual societies through instant communication vehicles like social media and the “Me” – a recent technological invention that has replaced the world of cell phones, iPads and PC’s into a be-all, do-all device. Although predominantly stuck in this middle class, The Siblings recognize the power of their connectivity and voice as a pivotal gateway to responding to and making impact on pressing needs, such as an increase in the numbers of cancers caught and cured. And two basic human premises have continued to dominate amidst the long, drawn-out recession: altruism, and the willingness to survive.

Lights, Camera, Action!...

It’s muggy, hot and noon in Washington, D.C. The Senator races up the steps of Conversation Hall in the Senate building toward a slightly-built, slightly graying man whom he recognizes, from previous video-conferencing, to be The Scientist. The two greet each other with a handshake and after engaging in the pleasantries of small talk, finish with a unified “Let’s do this.” Conversation Hall is dauntingly cool, embellishing a large wooden table shiny enough to check your reflection in. The TA must have readied the equipment well as the familiar beeps from satellite connections start to fill the room. Soon, everyone is “seated.”

The agenda began with two testimonies, one from The Senator about raising a son and daughter in his widowhood, and the other from The Survivor, who also happened to be an

⁷ Source: <http://blog.seattlepi.com/thebigblog/2011/12/16/gates-foundation-wants-a-real-life-star-trek-tricorder>

accomplished fundraising professional. Through her networks, she managed to garner the participation of The Strategist – CEO of a company that provides green energy resources to public and private sector organizations (schools, mass transit centers, libraries) and The Seer – a young executive director of a nonprofit agency that has proven that putting into practice cutting-edge communications can align like-minded institutions across the U.S. for combined success. A representative from The Siblings (the cancer survivor alumni group) also joined the summit, and conversation ensued, filling the room with stories of hope and survival, gratitude and sadness, excitement and determination.

The Strategist shared that among corporate counterparts, and through his own experience as CEO, he has seen corporate donations increase only when initiatives would both bring together then benefit business, nonprofits, and government collectively. He shared the example of Cradle to Career (C2C), an innovative, Cincinnati-based effort that spread to 23 U.S. cities plus Calgary and Toronto. Part of the Portland, Oregon effort in its early stages, The Strategist explained that C2C harnesses the power of business, nonprofits, schools, government and faith communities to boost dismal high school graduation rates.⁸ Kids, he said, were prepared for school, supported while in school, and then supported after school in preparation for college. Why, he asked, couldn't this same model be applied to patients, pre-, peri- and post-cancer affectedness? Insurance companies, not unlike Medicare, were continuing to run their operations in a "do more with less" approach, passing along unfunded expenses to large and mid-size corporations. Small companies were no longer able to provide insurance coverage to their employees. In fact, smaller companies banded together, much like giving and investment circles, pooling their resources to support one another's start-up and growth goals, supply purchases, etc. Efforts by business leaders, like The Strategist, and their business alliance groups to share with large insurers innovative and streamlined methods with which to run their companies were met with firmly planted heels. Efforts by some to lobby the government for cost-capping regulation for insurers were routinely met with more closed than open doors.

Certainly, a significant outcome from today's Summit would be arming The Senator with new data that proves this clinical and translational research not only saves lives, but reduces the duration of the illness, thereby passing along significant cost savings to insurance companies, Medicare and to employers alike.

But the greater desired outcome, and sincere wish of The Scientist, would be identification of new pockets of philanthropic sources that would propel this research

⁸ Source: *Portland Business Journal*, "Corporate Donations Propel Cradle to Career Initiative," Oct., 21, 2011, pg. 5.

toward the next steps of regulatory body (FDA) approval, thereby generating greater access by patients and providers to this cutting-edge treatment.

Next on the agenda, The Seer shared his experience in the animal welfare world with business models being widely shared among fellow organizations. He talked about Best Friends, an organization in Utah that provides a permanent sanctuary for unadoptable pets. Individuals and families plan week-long vacations that involve stays in an adjacent hotel and volunteering their time to care for these institutionalized animals. The Best Friends model was so successful that the organization raised more than enough money for its own program and began board, staff and resource sharing with like institutions across the country. Why, this young leader asked, couldn't this approach be used in today's cancer research agenda? Millennials and the new millennials in particular, he said, still desire hands-on involvement in the causes they support.

After the testimonials and stories, the archaeology of discovering new sources of support began. The Survivor, a veteran fundraising professional, briefed the group on the current philanthropic climate surrounding individuals and families. The last 15 years, she said, had brought an unprecedented shift in the way major gifts, in particular, are cultivated and received. Because of the continued time constraints on millennial and gen-Y and gen-X families, the immediacy and urgency with which information is distilled then shared had become key to the gift decision process. Significant gifts were no longer taking an average of 18 months to close. Six- and seven-figure gift decisions were being made in short bursts based on family conversations, friend networks, virtual board meetings and the continual flow of information that paints pictures of need, success, outcome, more need, etc. Multi-year pledges had become a rarity among the upper middle class and the ultra wealthy as their routine shifted from planning around long-term investment and giving goals, to not being able to count on their returns to fuel needs and promises over lengthy periods of time.

With the Summit table set, the six began brainstorming, and individual names began to surface and cover the virtual whiteboard. Names jotted would instantly reveal links to contact information and on-line profiles. App touches revealed up-to-the-minute values of asset holdings when available.

A Happy Ending...

By the end of the Summit, the team had already made 27 on-line introductions to various people of philanthropic means and/or in cancer interest groups and a half million in very early funding commitments were made, including the offer of a 2:1 match.

What became glaringly apparent to The Senator was the power of relationships and communication, the former resting on histories of altruism and survival since the beginning of humankind, and the latter, transforming with such rapidity to an ever-growing technological world that its human counterparts are continually in learning mode. Communication continuity – frequent updates, up-to-the-minute data, daily stories of trials and triumphs frees individuals to consider and make faster, yet still strategic decisions in a world that won't wait.

The summit having concluded with marching orders and next steps in hand, the six bade farewell until the next virtual gathering, and The Senator and The Scientist rose from their seats in Conversation Hall. As they descended the steps of the Senate building, The Senator enjoyed a moment of renewed confidence. How refreshing it was to spend three short hours in a room without political agendas – where every sector in the room truly cared and stood to benefit from The Scientist's remarkable work. Amy would be proud, he thought.

Some Parting Words...

It was my hope that the scenario above made clear that whether despite of, or because of, the silo effect, individuals and institutions within those silos will turn to altruism and survival instincts to think and behave outside their respective walls. I've embraced this essay work in future-casting as an exercise that, like walking and sit-ups, we all must do regularly. Our ability as nonprofit executives to continue harvesting the spirits and resources of altruistic people for greater human good depends on it.