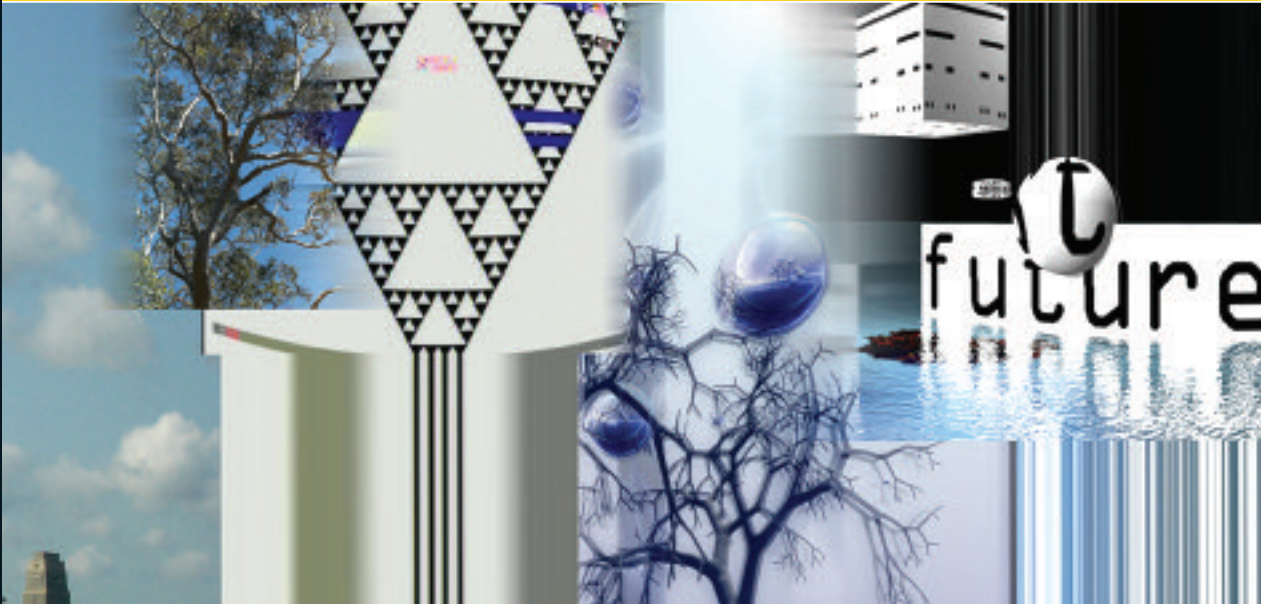


FORESIGHT AND PHILANTHROPY: TOWARDS A NEW ALLIANCE



Richard A. Slaughter
Serafino De Simone
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Foresight and Philanthropy



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ABOUT THE AUSTRALIAN FORESIGHT INSTITUTE

The Australian Foresight Institute (AFI) is situated in Swinburne University of Technology, Melbourne, Australia. AFI is a specialised research and postgraduate teaching unit. It was established in 1999 to develop an innovative set of postgraduate programs and research in the area of applied foresight. Apart from supporting the University in developing its own forward-looking strategies, its main aims are to:

- provide a global resource centre for strategic foresight
- create and deliver world class professional programs
- carry out original research into the nature and uses of foresight
- focus on the implementation of foresight in organisations
- work toward the emergence of social foresight in Australia.

AFI is intensively networked around the world with leading futures/foresight organisations and practitioners. These include World Future Society and the World Futures Studies Federation.

AFI offers a nested suite of postgraduate programs. Based on coursework, the programs are offered through the Faculty of Business and Enterprise at the University.

Overall, AFI aims to set new standards internationally and to facilitate the emergence of a new generation of foresight practitioners in Australia. It offers a challenging, stimulating and innovative work environment and exceptionally productive programs for its students who come from many different types of organisations.

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COVER ART

Dr Cameron Jones

Title: InFractal Cycles We Go Round

Cover image designed by Dr. Cameron Jones, Chancellery Research Fellow, School of Mathematical Sciences. These images were generated as part of The Molecular Media Project that is concerned with science-driven art and design. This work is a meditation on space and time, and how events are partitioned across many different scales: real, imaginary and complex.

Foresight and Philanthropy: Towards a New Alliance

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Foresight and Philanthropy: Towards a New Alliance

Introduction

BY RICHARD SLAUGHTER

Foresight and philanthropy have both existed, in one form or another, for centuries. It took the former to justify the huge efforts required to construct huge walls around ancient cities to protect them against anticipated attack. The granaries of ancient Egypt did not arise by accident but by deliberate efforts to moderate the vagaries of nature and hence the impacts on human beings. Similarly, philanthropy, the act of giving, is just as ancient and can be seen throughout human history. One wonders, for example, how memorable what became known as ‘the Renaissance’ would have been without the largesse of the Medici family in Florence.

Today the fulfilment of a whole series of technical and cultural revolutions has brought humanity to a new stage of development. We are challenged, as never before, to learn how to live together in peace and also how to manage this small planet on a completely different basis. Age-old social problems of violence, misery and starvation remain present. But they are exacerbated by the emergence of quite new problems and challenges including:

- further technical revolutions that provide God-like powers to individuals, groups, and nations that manifestly lack the God-like ethics to use them well
- the rise of post-modern cultures that have severed many of the links between human beings and the natural systems upon which their existence depends

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- the parallel rise of market-oriented ideologies that have sponsored forms of development that work directly against the long-term interests of humanity
- the rise of new forms of conflict within and between nations
- the steady progression of the global system away from sustainable use toward ‘overshoot and collapse’.

In this context foresight and philanthropy are challenged to find new purposes, assume new forms and develop new approaches. They also need to begin working much more closely together. Each has access to some of the resources that are needed to help humanity regain control of its destiny and ‘steer’ in more life-affirming directions. Foresight, as it has developed in the early twenty first century, has emerged from being a little-understood, under-regarded aspect of human capability, to being increasingly seen as ‘a principle of present action’ at the social level. While still uncommon in terms of widespread applications, the more advanced forms of foresight that are now available provide humanity with flows of knowledge and insight that point away from disaster and decline toward sustaining, and sustainable, futures. Philanthropy, on the other hand, is itself no longer a social and economic sideshow. It has become an identifiable sector of activity in its own right with a literature, organisations (including foundations), a body of theory and practice, and even centres of excellence where relevant skills are taught and learned.

What is needed now is for these two, hitherto separate, sets of human and cultural responses begin to interact – to learn from each other, support each other and, in some contexts, work much more directly together than ever before. There are two key reasons for this. First, and fundamental to all that follows, is that both enterprises draw on largely the same underlying motivation. People work in foresight, and people devote their lives or fortunes (or both) to philanthropy, because they care deeply about a range of issues: young people, social wellbeing, the future of our species and its world. The degree of overlap and the exact focus obviously varies from case to case. Underlying nearly all expressions of each, however, is the fundamental issue of caring. This unity of underlying purpose will be vital in forging new links between them. Second, both foresight and philanthropy are now operating in a world that trembles on the edge of chaos and social breakdown on a scale never before seen.

The dynamics behind this are no secret – they are widely understood; but there are still too few people who can put the pieces together and clearly understand the consequences. There are several reasons for this. One is that the tools and methods that are required to understand the world as a total system have only recently emerged, as have the computing capacities needed to make sense of them. Another is that the disciplines of Futures Studies and applied foresight are still progressing through their

own (necessary) processes of development and legitimation. A third, often overlooked, factor is that those heading up large enterprises, be they government or private are, on the whole, systematically prevented from comprehending the scale of hazard that we confront by their adherence to short-term thinking; their unreflective use of outdated paradigms and ways of knowing; and the sheer impossibility of them ever being able to ‘come clean’ about the very real dangers facing humanity. That, quite simply, is ‘not what they are about’. They are charged with such vital matters as ‘maintaining confidence’ and ‘enhancing shareholder value’. As such they can never risk the vengeance of a system that severely punishes anyone who strays too far out of line.

A more puzzling feature is the bureaucratic ‘mind game’ played out in educational bureaucracies and institutions around the world. While ostensibly concerned with preparing new generations for ‘active citizenship’ (or whatever the current term happens to be) they turn their attention *away* from the sources of global dysfunction as well as away from those who understand it and have developed appropriate tools to deal with it. This is a huge mistake.

The fact is that, as time goes by, the human race continues to destroy natural capital and is steadily running out of options. Ruined land cannot be made fertile again quickly – if at all; tropical forests and coral reefs cannot be readily reconstructed; species of animals, birds, insects, plants etc cannot be recovered once they have slipped over the edge of extinction. So as humanity presses ever more dangerously against global limits the natural wealth of the planet becomes ever more compromised and diminished. The ‘overshoot and collapse’ mode has been well studied and can no longer be dismissed as a fantasy promulgated by over-confident environmentalists and model builders. There are powerful reasons to suggest that the world entered the ‘overshoot’ phase some years ago and that, consequently, the ‘collapse’ stage cannot be much further ahead. Indeed, it is already past for many poor populations, ocean fisheries, tropical forests and once-productive land.¹

This is why foresight practitioners and philanthropists need to forge a new alliance. Taken singly they may have some effects here and there. But, working separately, it strains credulity to believe that they can moderate the global rush to disaster. If, however, a set of powerful new synergies were to be developed through common efforts, there is a chance – only a chance – that the combined power of each could initiate (or at least support) a new social and cultural dynamic. The purpose of this would be to bring humanity to its senses, to bring it back from the brink, as it were, and to help it move into a new stage of development. Too difficult? What is there to lose?

The first paper presented here is based on an attempt to begin with the current state of philanthropy and to explore some of the many practical ways that philanthropists

and foresight practitioners can begin the process of working toward the synergies outlined above. It draws on recent scholarship, practical knowledge and also on some explicitly futures-oriented work already carried out in the United States. As such it will hopefully stimulate many to not only consider some of these options but also to take practical steps to implement some of them. In this connection, Serafino De Simone's proposal for an Institute of Philanthropic Foresight needs to be taken very seriously indeed. Such a development would not need to 'reinvent the wheel' as it were. Rather, it would be created within a context where a great deal of practical knowledge, both from philanthropy and from foresight contexts, is available to enhance the chances of success.² One way to measure this success would be in tangible steps toward the development and implementation of social foresight.

The second paper has emerged from the AFI program of applied research. It takes a fresh look at the thinking that stands behind the usual, conventional, ways of understanding and evaluating what are termed 'social problems.' Dr Gio Bradotti confronts the paradox that certain 'solutions' seem contradictory; both promising to solve, and exacerbate, such problems at the very same time. She makes a strong case for drawing on post conventional methods and resources that, thus far, have seldom been deployed in this or other social policy contexts. In so doing she demonstrates very clearly that, while the outlook is indeed bleak, there are multiple options for constructive and creative responses that have yet to be properly explored.

As philanthropy begins to take up some of the more advanced tools and approaches that have been developed within the applied foresight domain, new options for foresight and philanthropy will spring into focus. The prospects for humanity could therefore be dramatically improved. Overall, the promise and challenge of this monograph is an invitation to look beyond conventional, stereotypical, views and to locate the post conventional sources of long-term solutions. In the long run there may be no better way to celebrate and apply some of the underlying values shared by both enterprises.

Richard A Slaughter
Brisbane
June 2005

NOTES

¹ D. Meadows, et al, *Limits to Growth – the 30 Year Update*, London, Earthscan, 2004

² R. Slaughter, *Futures Beyond Dystopia – Creating Social Foresight*, London, Routledge Falmer, 2004, see especially chapter 14: creating and sustaining second-generation institutions of foresight



1 Foresight and Philanthropy:

A partnership for accelerating societal level well-being

SERAFINO DE SIMONE

Philanthropy seeks to improve society by providing funding, expertise and other resources to help manage and implement socially beneficial initiatives that address issues that government and business have devalued, ignored or created. Philanthropy is based on traditions of wealth creation and sharing that are being challenged by the complexities of a rapidly globalising world where established relationships and boundaries are being redefined against a backdrop of poorly understood problems and opportunities.

Foresight seeks to improve society by engaging individuals and groups as powerful actors who feel empowered to shape their destiny by understanding their interconnectedness and the future implications and opportunities of their present day actions. However, Foresight is an underused discipline that requires fostering through education programs and public discourses; increased applied research to refine methodologies; and visionary leaders to embed its use within their communities, organisations and societies.

This paper establishes a rationale for an alliance between the fields of Philanthropy and Foresight by demonstrating how their collective aim of improving the well-being of society can be greatly accelerated by collaboration between these two fields.

Foresight provides Philanthropy with a capability to understand, interpret and respond to its challenges and to conceive and explore as yet unimagined approaches and solutions to problems. The philanthropic sector represents an ideal opportunity to become an incubator for applying Foresight, providing direct benefits to its own thinking and planning processes and acting as a role model for a broader adoption of foresight throughout society.

Philanthropy and Foresight share many ideological foundations. This provides the basis for a deeper level of cooperation that should assist both fields in institutionalising the use of philanthropy and foresight as everyday behaviours. This new thinking and new attitudes, when broadly applied, should foster a significant acceleration in the rate of improving societal level well-being.

The opportunities for cooperation between Philanthropy and Foresight are explored at a concept level by this paper. There is a strong indication that there will be significant benefits from any level of cooperation from the basic use of Foresight in individual philanthropic institutions, through to a fully aligned cooperative model. It is therefore suggested that further discussion and research be conducted to detail the cooperative approaches required and to understand the nature and extent of benefits that can be achieved.

Research and Nomenclature Note

The capitalised form of ‘Philanthropy’ and ‘Foresight’ when used in this paper are meant to refer to the commonly accepted practice in these two fields, rather than the acts of philanthropy or foresight. Foresight is generalised to mean the use of Social and Strategic Foresight, the application of Future Studies research and methods and other foresight practices as applied by trained futurists.

The background research for this paper involved gaining an understanding of the:

- traditions of Philanthropy
- current state of Philanthropy
- directions of Philanthropy and its major challenges and opportunities
- use of planning and foresight approaches by philanthropic organisations.

This research was undertaken by scanning:

- a selection of major US and Australian philanthropy journals
- the contents of the Philanthropy Australia resource centre
- the contents and associated printed reports from the *Future of Philanthropy*¹ website
- numerous web sites of peak philanthropic bodies.

WHAT IS PHILANTHROPY?

Philanthropy is ‘voluntary giving by an individual or a group to promote the common good and improve the quality of life’.² Philanthropy is usually distinguished as being an:

- *informed* process of giving – where funds are deliberately directed to causes of interest based on an appropriate degree of research
- *involved* process of giving – where the giving of funds is supported by the provision of time, expertise, contacts and other non-monetary acts.

The giving is most often provided to a dedicated organisation – a ‘charity’ – that controls its application to the desired end purpose. *The Report of Inquiry into the Definition of Charities and Related Organisations*³ recommended that a charity be defined as a not-for-profit entity that has a dominant purpose or dominant purposes that are:

- charitable
- altruistic
- for the public benefit.

The concept of altruism above was characterised as a voluntarily assumed obligation towards the well being of others or the community generally – building on the common dictionary definition of Philanthropy as being unselfishness and concern for others.⁴

Charitable purposes were recommended to be defined as:

- the advancement (meaning protection, maintenance, support, research, improvement or enhancement) of:
 - health
 - education
 - social and community welfare
 - religion
 - culture
 - the natural environment
- other purposes beneficial to the community, which without limitation include:
 - the promotion and protection of civil and human rights
 - the prevention and relief of suffering of animals.

The definition above provides an insight into the opportunity and requirement Philanthropy has to foster a wide range of charitable activities. These charitable activities span the diverse continuum from acts of mercy to relieve immediate suffering to acts of community service to enhance quality of life including cultural, educational and artistic pursuits.

Tradition of Philanthropy – United States

Andrew Carnegie is often viewed as the father of the tradition of Philanthropy in the United States. After selling his business interests in the early 1900s he established the Carnegie Corporation as a philanthropic trust with initial capital of \$125 million and devoted his life to philanthropic causes, giving away ninety percent of his own money amounting to some \$350 million during his lifetime.

Carnegie's views on wealth accumulation and distribution using a managed philanthropic process during one's own lifetime are captured in his essay *Wealth*⁵ that was published in 1889. In this essay Carnegie states:

This, then, is held to be the duty of the man of Wealth: First to set an example of modest, unostentatious living, shunning display of extravagance; to provide moderately for the legitimate wants of those dependent upon him; and after doing so consider all surplus revenues which come to him simply as trust funds, which he is called upon to administer...to produce the most beneficial results for the community.⁵

This US tradition of Philanthropy exemplified by Carnegie's essay, is based on the following principles, and can be summarised as the tradition of 'Philanthropy as Patronage':

- people of talent should be encouraged to exploit the capitalist system and play a 'hard game' to generate as much wealth as possible
- the excess wealth generated should be seen as being held in trust to be redirected for the public good
- these people of talent should invest their time to manage the redirection of their accumulated wealth as they have the best wisdom and insights into how to conceive and manage projects that make society better
- this approach is better than having wealth distributed evenly in the first place as this would not result in the funds for major initiatives being accumulated – rather the dispersed wealth would be consumed in small amounts to satisfy immediate needs – leaving nothing of lasting value.

Philanthropy as part of the Third Sector

Government and Business organisations are immediately recognised as part of the structural foundations for society. These two sectors co-exist with a large and diverse body of organisations that Mark Lyons analyses in his book *The Third Sector: The contribution of non-profit and cooperative enterprises in Australia*.⁶ Lyons describes Third Sector organisations as private organisations:

- that are formed and sustained by groups of people (members) acting voluntarily and without seeking personal profit to provide benefits for themselves or others
- that are democratically controlled
- where any material benefit gained by a member is proportionate to their use of the organisation.⁷

The factors that Lyons states stimulate the growth of the third sector include:

- religious beliefs (living out these ideals)
- secular ideologies
- economic self-interest
- the desire to socialise and recreate by sharing enthusiasms
- evangelists for existing nonprofits
- government encouragement and finance.⁸

The philanthropic sector is a subset of this Third Sector and its directions reflect those of the sector generally.

Philanthropic Foundations

Outside of direct giving to a charity, the most common approach for philanthropic giving is via a purpose established philanthropic organisation – usually established as a philanthropic foundation under a trust deed. These foundations invest their income gained from donations and use the periodic earnings from these investments as the basis for grant making – providing an enduring stream of philanthropic funding. Foundations usually have several functions and according to their nature these may include:

- investment and management of funds held under trust and income earned
- research into available options or approaches for solving issues of interest to the foundation
- assessing, researching and processing requests for giving

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- providing expertise and other non-monetary giving to recipient organisations
- advocacy for specific causes.

The size, capability, amount of funds and other forms of giving available vary greatly between different foundations. Many umbrella organisations exist to provide an overarching degree of expertise and advocacy for the philanthropic sector. For example the Council of Foundations that is headquartered in Washington and serves the needs of numerous diverse US philanthropic foundations has the following as its goals:

- secure and maintain supportive public policy for philanthropy;
- promote responsible and effective philanthropy
- enhance the understanding of philanthropy in the wider society
- support and enhance cooperation amongst grant makers
- increase the growth of organised philanthropy.⁹

DIRECTIONS IN PHILANTHROPY

The US tradition of ‘Philanthropy as Patronage’ provided the platform for establishing many great philanthropic foundations. Much of the focus of these early foundations was on directly relieving poverty or health related distress or on supporting cultural or educational institutions including the arts sector, libraries and universities. These early foundations provided essential support at the two charitable extremes of basic survival and high quality of life in a fairly pragmatic and uncomplicated way direct to stand-alone purpose focused institutions.

Many other forms of philanthropic foundations and related practices have evolved since that time to recognise:

- the continuum of needs in between the charitable extremes
- the interconnectedness of many issues
- the need for systemic approaches that address root causes and promote self-help
- the perceived and actual need for greater involvement, greater transparency and speedier, broader and sustained results from giving
- changing human value systems.

The following non-exhaustive list outlines some of the variants of philanthropic organisations that now exist. This list is provided to demonstrate that, as the wide variety of charitable needs is considered, a diversity of opinions and approaches has evolved in response to meeting these needs. This is part of the continuing change

process that Philanthropy faces as new opinions are brought to the fore and new problems are explored.

Progressive philanthropy organisations:

- promote social change and social innovations by addressing root causes and establishing the basis for sustained new behaviours and capabilities
- often aim to achieve community based self-help outcomes
- will often look at risky (financial or otherwise) or innovative approaches that government will not consider and addressing minorities or causes that are ignored by mainstream approaches.

Community based philanthropy organisations:

- rely on broad based giving (including of small amounts) by individual members of the community rather than that of a wealthy individual/family or government or corporate funding
- aim to accumulate a meaningful pool of funds that can be applied to solving desired problems
- are most often used to address local community based concerns
- are seen to be more democratic and open than private or corporate foundations – involving the community in the process of deciding on courses of action and involving them actively as volunteers.

Venture philanthropy organisations:

- use a mix of market driven investment and venture capital theories in an attempt to increase the performance of charitable organisations
- aim to entrepreneurially fund initiatives, help establish them to be self-sustaining and then ‘get out’
- are usually associated with a newer generation of philanthropists that believe in applying the venture capital approaches that have been used to help incubate new business ventures
- involve a much higher focus on defining and achieving agreed performance targets as interim measures of success.

Corporate philanthropy organisations:

- align giving to achieving desired outcomes for the corporate including being seen to participate in Corporate Social Responsibility initiatives

- often incorporate parallel giving of funds and volunteering of time by staff with the aim of creating a strong sense of caring, belonging and purpose in the corporate
- maintain a focus on understanding and measuring the outcomes and returns to the corporate and not just the giving activity.

THE CHALLENGES FACING PHILANTHROPY

Challenges to the Third Sector

The challenges facing the Third Sector set the overarching context for the types of problems that Philanthropy will face. Lyons suggests these challenges are:

- government actions including funding, direct provision and regulation resulting in dramatic changes in the way governments construct their relationship with the third sector
- for-profit competition or reshaping of activities as for-profit organisations start providing services traditionally exclusively supplied by the third sector
- changes in popular taste with people being less ready to belong to and identify with third sector organisations and to engage in voluntary activity.¹⁰

Specific challenges facing Philanthropy

The above challenges are indicative of those generally facing Philanthropy. The following is a non-exhaustive list of the specific issues facing Philanthropy that were identified during the research for this paper:

- Blurring of distinctions between business (capitalist), civic (government) and philanthropic roles.
- Changes in government funding to charitable organisations – including competitive tendering approaches and outcome based voucher/fee for service funding instead of blanket funding.
- Abandoning of government funding for certain services in favour of having services provided by the for-profit business sector using market solutions.
- Expansion of the business sector into the competitive provision of social services on a for-profit basis – recent examples including health care and childcare – cherry picking the most profitable segments and distorting the ability of charities to balance ‘profitable’ and ‘unprofitable’ services and provide all of these broadly without discrimination.
- Coherence within the philanthropic sector itself and with the third sector generally – how do organisations relate, compete and cooperate?

- Increasing income inequality creating new obligations on the ‘super’ wealthy to share whilst causing a spiral of secondary inequalities in access to education, technology and health services by those with the lowest incomes—creating new challenges and the need for new approaches to how equalities should and can be generated.
- The effects of all forms of social entrepreneurship and coping with the accelerating the rate of social change and non-homogenous social environments.
- Understanding the current intergenerational wealth transfer – what is the nature of this perceived opportunity for significantly increased philanthropic giving by the next generation?
- How to respond to the demands and perceived needs of givers, constituencies and governing bodies for openness, evaluation and communication?
- How to build the internal capacity of philanthropic organisations?
- What will be the impact of the increased desire/requirement for corporate social responsibility initiatives? How should the philanthropic sector engage with business?

These challenges have been summarised across a number of philanthropic publications as a call to action for philanthropic organisations to:

- adopt proven business management practices in appropriate ways
- recognise the need for organisational capacity building
- understand changes in their constituencies’ values and needs and make sure they meet these
- increase accountability and openness to the wider public
- act in a more concerted way with the rest of the third sector
- get the right mix between local and global in ideas and action.

Whilst the above is largely derived from how philanthropy is traditionally and presently practiced within the traditional western economies of the US, Europe and Australia, it is representative of what seems to be happening around the globe. What is less accounted for are the specific perspectives of the growing ‘new rich’ individuals across Asia and in the middle-East that bring new views and traditions to the philanthropic sector. Combined with a growing tension about just how ‘local’ or ‘global’ philanthropic organisations should be in considering and addressing issues this adds new complexities to the field.

WHAT IS FORESIGHT?

In *Futures for the Third Millennium*¹¹ Richard Slaughter describes ‘Strategic/Social Foresight’ as ‘the ability to create and maintain viable forward views and to use the insights arising in organisationally/socially useful ways’.¹² The capability for strategic foresight is based on nurturing and applying the innate human capacity for foresight in conjunction with a range of discourses and tools and methods that have arisen in conjunction with the rich underlying field of Future Studies. Strategic Foresight is a consciously exercised capacity that can be utilised to enrich and inform the strategic thinking and planning in a range of social and organisational contexts.

A complementary discussion on Foresight is provided in Wendell Bell’s *Overview of Future Studies*¹³, where Bell states:

Futurists (foresight practitioners) aim to discover or invent, propose, examine and evaluate possible, probable and preferable futures. They explore alternative futures in order to assist people in choosing and creating their most desirable future...The major obligation of futurists is to maintain or improve the welfare of human kind and the life sustaining capacities of the Earth itself...Futurists’ distinct obligation to the future invites them to speak for the freedom and wellbeing of future generations.

From a pragmatic perspective within organisational settings, foresight work falls into four inter-related domains:

- What is going on out there – bringing the outside in, raising awareness (anticipation)
- Problem finding – understanding how the world works and what motivates people – posing interesting questions (developing strategy)
- Problem solving – applying foresight to present concerns (making sense)
- Seed Planting – instilling an understanding of the future within the organisation as a background task (action-based organisational learning).¹⁴

The above approaches used individually or in combination, permit an organisation to gain a deeper understanding of itself, and its role, by exploring the broader context it operates within together with the future challenges and opportunities that it faces.

Foresight is a meta-discipline that draws upon many approaches – for example, Table One illustrates those presented by Slaughter as part of a review of what was already available from the foresight field in the early 1980s.

Future Research	Prediction	Trend exploration
(knowledge seeking focus)	Economic and Technical Forecasting	Social indicators Social forecasting Technical assessment
	System Analysis	Global and social modelling Long cycle research Simulation of change processes
	Management Science	Issues management Decision and risk/benefit analysis Policy analysis
	Scenario Writing	Ethnographic futures research Cross-impact analysis Delphic Surveys
	Comparative Surveys and Critique of Futures Issue	Digests, indexes, overviews of problems and dimensions of change
Future Studies (synthesis, criticism and communication)	Futures in education	Professional training and development Curriculum innovation and course development Interdisciplinarity
	Speculative writing	Social imaging processes Creation and falsification of images Exploration of the trans-rational
	Networking	Global communication Social innovations Green politics
	Theory and practice of alternative lifestyles	Alternative technology Reconstruction of community New age cultures and values
Future Movement (stimulating, reconceptualising and possibly leading change)	Humanistic and Transpersonal psychology	Future imaging workshops Despair and empowerment work Psychodrama, psychosynthesis

Table One: Foresight as meta-discipline¹⁵

The above approaches have been continually refined and successfully applied to a wide range of initiatives. New approaches have been introduced to complement the above and some of these include:

- Integral Foresight approaches that comprehensively analyse issues using the four dimensions of internal subjective domains and external objective domains viewed from an individual and collective perspective – providing a richer understanding of how development occurs or is hindered

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- Causal Layered Analysis that helps open up an understanding of how issues were constructed in the past and present so that alternative futures can be explored by revealing the deep worldview commitments behind surface phenomena
- Enhanced critical methods that allow for reconceptualising understandings and opening up thinking to alternate ways of operating.

The challenges facing Foresight

Whilst the use of foresight is an innate human capacity, its institutionalised use is discouraged in Western industrial settings that focus on:

- competitive, consumption oriented mentalities
- survival of the fastest and fittest
- discounting anything that is not empirically measurable
- short termism
- where social innovations lag technological innovations.

This is compounded by a lack of preparedness to invest in the timeframes and cost of acquiring the requisite background knowledge and skills required for individuals and organisations to become effective in applying Foresight.

For Foresight to gain further legitimation and become an institutionalised way of acting the following are needed:

- visionary leaders that are prepared to take a much longer term perspective and actively apply foresight approaches to inform their strategy and actions
- the funding of additional education in Foresight at all levels
- the funding of additional academic and applied research into Foresight
- the establishment of Institutes of Foresight that can act as catalysts for increased adoption of Foresight
- additional effort in translating and packaging emerging foresight theories and ideas into easily applied tools and methods.

The philanthropic sector presents as an excellent role model for foresight use, demonstrating the potential and benefits of foresight applications, providing a catalyst for wider interest and adoption.

AN INTEGRATED AGENDA

Part One

Applying Foresight within philanthropic organisations

This section establishes a rationale for using Foresight within philanthropic organisations. This is based on the benefits of using Foresight approaches to solving the types of problems being faced by philanthropic organisations.

Evidence of current planning approaches used in Philanthropy

Observations resulting from the research for this paper suggest:

- many philanthropic organisations are still coming to terms with the basic business practices and capacity building that are essential to them becoming both operationally efficient and more transparent and accountable and have not yet reached a level of capability where considered long-term forward thinking or planning regularly occurs
- the planning that is occurring is heavily focussed on current and immediately emergent issues with a strong emphasis on how to sustain or increase fundraising which is core to survival
- there is sufficient information about the major changes and challenges that are being faced by philanthropy but little detailed information about proposed approaches or solutions to these
- there is some disagreement within the sector between proponents of different methods for analysing and solving problems and only a limited understanding about what types and forms of cooperation would be beneficial.

When the research for this paper first commenced in 2003, only one reference to the use of futures tools and methods was found but this was narrowly focussed on the use of long-term (ten year) trend forecasting.¹⁶ In 2004 and 2005, through the sponsorship and vision of the Kellogg and Packard Foundations¹⁷, a number of foresight initiatives were undertaken within the philanthropic sector in the US. This culminated in the publishing of several pieces of work and launching of the ‘Future of Philanthropy’ website, which is discussed below.¹⁸

Notwithstanding the limited nature of the research conducted for this essay, the observations made here about the philanthropic sector have been supported during various conversations with reviewers, influencers and participants within the sector as well as by the findings of the more recent background work undertaken by the ‘Future of Philanthropy’ project.

Applying Foresight within the philanthropic sector

The specific challenges affecting the philanthropic sector are in part manifestations of these generic challenges:

- increasing rates of change
- increasing complexity
- convergence and overlap of various fields and functions
- divergence from local to global and from narrow fields of interest to having to deal with complex interrelationships
- changing values, expectations and needs of all stakeholders
- the emergence of new players and new ideologies from within the Asian and Middle-Eastern countries
- dystopic feelings that the complex problems being faced cannot be solved.

Foresight practitioners are capable of applying in combination a wide range of foresight tools and methods to assist philanthropic organisations address the above issues by helping them develop:¹⁹

- an understanding of the big picture concerns about human purposes, cultural/societal evolution and sustainability
- a capability to scan the environment for signals of change that will have impact on present day decisions
- a creative capability to gain insights into novel and unconventional future possibilities that can provide the basis for new ways of operating and solving present day and emergent problems.

These capabilities facilitate the generation of ‘a well-crafted forward view (that) reduces uncertainty and reveals the grounds of otherwise unavailable strategic options’.²⁰ If adopted widely such capabilities will help ensure philanthropic organisations can become future-responsive rather than past-driven and gain a strong sense that they are directing their efforts in the best way possible.

By exercising Foresight on a continuing and anticipatory basis, emerging problems and opportunities can be dealt with proactively and confidently. Using Foresight to uncover the intricacies of complex issues and to provide shared visions about how these issues might be addressed offers the philanthropic sector the opportunity to define and establish more meaningful and effective collaborations within and across the sector. This will help avoid much of the confusion, duplication of effort and despondency that exists when trying to address these more complex issues. In so far

as philanthropic efforts are aimed at creating a better future, the use of Foresight becomes a welcome and necessary companion, helping to provide the clarity and conviction required to sustain philanthropic efforts.

Use of Foresight within individual philanthropic organisations

The use of foresight within philanthropic organisations will help them understand and address many of the challenges they are confronting in a more confident and productive way. Foresight skills can be acquired through:

- engaging established Foresight practitioners on a consulting basis
- sponsoring existing staff through a recognised program of foresight education, usually at a post-graduate level, and ensuring they develop and maintain contact with a network of other foresight practitioners
- hiring new staff that have foresight skills and their own network of contacts.

The application of foresight will be most successful when it is accompanied by:

- management exposure to general foresight concepts
- broad organisational support and involvement in the foresight process
- providing sufficient time for results to come from the foresight program whilst embedding foresight concepts in everyday thinking and planning.

The ‘Future of Philanthropy’ Project

In 2000, the Packard and Kellogg Foundations asked Global Business Network (GBN)²¹, a well established futurist consultancy, to explore how the tools of futures thinking might be applied to the non-profit sector. This was based on their perception that this sector was not keeping up with the pace of change in the world.

By early in 2005, this initiative culminated in three major outputs:

- The launch of the ‘Future of Philanthropy’²² website as a repository of documents produced via this initiative. This website also contains worksheets, stories, case studies and links to related resources. There is an intention that this website be used as a way of continuing the ‘Future of Philanthropy’ initiative and keeping it fresh, topical, interactive and accessible
- The production of a freely-accessible comprehensive and customised guide on the use of scenario thinking as a ‘powerful way of embracing, influencing and planning for the future’.²³ This was aimed at fostering foresight capabilities within individual organisations based on the assumption that if the status quo is not an option then considered thinking about the future is required

- The production of a freely-accessible major Guide – *Looking out for the Future: An Orientation for Twenty First Century Philanthropists*.²⁴ This Guide applies scenario thinking to the philanthropic sector as a whole.

The *Looking out for the Future Guide* is framed around ‘The New Ecology of Social Benefit’ which is described as follows:²⁵

Every philanthropic effort to promote social benefit takes place in a new ecology – a context deeply different from that in which many of today’s institutions, assumptions and habits were formed. The pressures of this new ecology and the need to respond to it, will shape both how philanthropy is practiced for the next generation and what philanthropy is called upon to do.

There are two central questions that underlie the Guide:²⁶

- How can you make better decisions in support of the issues, institutions and communities you care most about?
- Are you doing the best you can with the resources at your disposal?

These questions anchor the Guide in providing pragmatic appraisals based largely on plausible futures and based almost entirely on a US centric view. The context of evaluation is around future uncertainties that are related to the US philanthropic sector’s major concerns of today for greater accountability, increased effectiveness and the need for infrastructure. Within the Guide seven major forces are examined.²⁷

World/Global Forces

1. Privatisation (evolution of power redistributing resources and influences)
2. Connection (new ways of connecting)
3. Acceleration (speed at which knowledge is shared and drives change)

Forces within the field of Philanthropy

4. Multiplication (many new players/cultures/traditions)
5. Diversification (many new ideas)
6. Observation (interest from outside the field)
7. Reflection (learning from the past and others)

The Guide highlights much about the typical anxiety experienced when facing the challenges thrust upon individuals, organisations and the whole sector from the above forces:²⁸

Why does a general mood of discouragement reign in many corners of philanthropy? Because the very forces that have created new resources and possibilities also create new gaps and demands, but not in equal measure...Doing good – making better choices that make a greater difference – can seem more difficult than ever.

Put simply the new challenges are obvious, but new opportunities are less obvious.

The Guide discusses the ‘seeds of change’ facing the sector based on six areas of experimentation:

1. Experimenting with grantmaking strategies – from more hands-on venture philanthropy approaches to more hands-off whole of organisational funding, not only arms length project based funding
2. Rethinking available resources beyond being just cash, to include influence, knowledge, expertise, time
3. Redefining the spheres of activity – working with and in the market, influencing policy – not just direct support for social needs, working beyond local causes
4. Creating a culture of learning
5. Aggregating actors – collaborations between interested parties issue/location, giving circles, brokers
6. Questioning the foundation form – new structures/approaches – e-philanthropy, networks, grassroots movements – individuals acting collectively.²⁹

Based on the above context, three scenarios are put forward for each of the most significant present challenges that were identified within the Guide.

Scenarios related to the Pressure for Accountability:

- ‘*The Donor in the Driver’s Seat*’ – Foundations go direct instead of funding providers
- ‘*Mutualismo, not Filantropia*’ – stronger community based models emerge based on models operating in Latino communities
- ‘*The Decline of Foundations*’

Scenarios related to the Demand for Effectiveness:

- ‘*Funding to the Test*’ – Funding shifts to projects whose impact can be easily measured

- ‘*Shaking Your Assets*’ – Invested and available funds used to achieve greatest influence in chosen field
- ‘*Joint Venture Philanthropy*’ – joint ventures between interested parties that are accountable to the communities they service deliver great gains

Scenarios related to the Need for Infrastructure:

- ‘*Googling Giving*’ – easy access to information stimulates new connections and encourages increased giving clustered around success stories
- ‘*Will you be my Fundster*’ – Increased ability to connect and collaborate expands choice and allows many customised and discrete causes to be supported
- ‘*The New Power Brokers*’ – Transparent philanthropic mutual funds allow accumulation of donations directed in areas of ‘interest’.³⁰

The scenarios presented in the Guide provide a means to help non-profit and philanthropic organisations reconceptualise their thoughts on how they might evolve into the future. The Guide demonstrates how a deeper, foresight-informed, understanding of these challenges can also help bring to the surface the opportunities that might emerge through the process of change. This reinforces the analysis presented elsewhere within this paper and provides a tangible example of how the use of foresight can be highly beneficial in helping the philanthropic sector navigate through change and uncertainty with increased confidence and clarity.

Exploring a deeper set of issues

What will philanthropy be called upon to do?

Foresight has been presented so far in this paper as a pragmatic tool that can help philanthropic organisations better understand their future challenges and opportunities. The use of foresight however can be applied at several levels and Slaughter presents these as follows:

Pragmatic	Help organisations carry out their work more effectively	The field of enquiry is narrow and is generally related to the current operations of the organisation.
Progressive	Supporting organisations contribute to systematic improvements and move towards sustainable practices and outlooks.	The field of enquiry is exploratory and is related to reframing the nature of the organisation as part of a wider community of interaction.
Civilisational	Help us consider the foundations of the next level of civilisation.	The field of enquiry is unbounded, based on exploring and understanding the dimensions of change, mapping future options and agreeing on preferable aspects of those futures.

Table Two: Levels of Foresight³¹

The latter parts of the *Looking out for the Future Guide* move from discussing the future framed in pragmatic terms into the realm of exploring the future as a set of possibilities including and beyond the plausible.³² This area is not explored deeply within the Guide but is used as a catalyst for asking the poignant question ‘What will Philanthropy be called upon to do?’

A quote from within this part of the Guide sums up the challenge to the philanthropic sector posed by this question as follows:

When historians look back at us from the vantage point of the early twenty second century, they will appraise our work not by its efficiency and effectiveness but by our boldness in confronting the major epoch-defining challenges of our day.³³

In addressing the challenge posed by this question, there are at least two components that need to be considered:

1. How do you identify the ‘epoch-defining’ challenges of our day?
2. What should/might Philanthropy do about these epoch-defining challenges?

The exploration of such ‘epoch-defining’ challenges forms part of a large body of study by those engaged and active in civilisation level foresight work. Civilisational foresight work analyses these challenges and tries to help create coherent forward views that allow present day activities to be firmly grounded in the context of desired longer term outcomes. This involves creating the basis and understanding for moving from dystopic views of the future to more positive views of the future that both empower and oblige individuals, organisations and societies to act in much more conscious and forward thinking ways than they do today.

The extent and nature of the ‘epoch-defining’ challenges of today are part of a set of far reaching and interrelated concerns that futurists have labelled as the ‘global problematique’. The scope and nature of what comprises the ‘global problematique’ and to what extent this is a concern has been strongly debated over many years. This is an evolving and living debate and one which does not, cannot, and should not, have a conclusion.

One analysis of some of the serious issues that constitute part of the ‘global problematique’ is presented in the book by Meadows et al, *Limits to Growth: The 30 Year Update*. This book reflects on thirty years of experience in understanding and reflecting on humanity’s impact on the earth and each other and the quest for a sustainable future. The authors stress that what they saw thirty years ago as a series of possibilities are now a dangerous reality with the world as they see it already in a

dangerous ‘overshoot’ situation. They argue that urgent corrective action is required, an opportunity which has been squandered thus far.

The book highlights the fine line between human growth and human development and shows how the two are not the same. From the authors’ perspective:

The global challenge can be simply stated: To reach sustainability, humanity must increase the consumption levels of the world’s poor, while at the same time reducing humanity’s total ecological footprint.³⁴

There must be technological advance, and personal change and longer planning horizons. The authors are not confident that appropriate approaches to these types of problems are being considered or put forward. Addressing what these authors have described is merely one example of how foresight could be applied to provide philanthropy with a renewed higher order agenda, one that aims to address the most pressing global needs.

Whilst there are counter arguments to the above, the debate itself should not be concluded or set aside as, in reality, debating our future has no endpoint. This debate desperately needs a present – a space in our every day activities and planning. If we are going to address ‘epoch-defining’ challenges with any degree of seriousness, we need to place them clearly on a clearly thought out futures agenda. This is one of Philanthropy’s greatest opportunities as well as perhaps being one of its greatest responsibilities.

Institutes of Foresight

‘Institutes of Foresight’ are dedicated foresight organisations that serve a variety of functions that have been analysed by Slaughter to include:

- Raising issues of common concern that may be overlooked in the conventional short-term view – for example peace, environmental stability, intergenerational ethics, implications of new and expected technical developments
- Highlighting dangers, alternatives and choices that need to be considered before they become urgent
- Publicising the emerging picture of the near-term future in order to involve the public and contribute to present day decision-making
- Contributing to the body of knowledge about foresight and the macro-processes of continuity and change that frame the future
- Identifying the dynamics and policy implications of the transition to sustainability

- Helping to identify aspects of a new world order so as to place these on the global agenda
- Facilitating the development and application of social innovations
- Helping people to deal with fears and become genuinely empowered to participate in creating the future
- Helping organisations to evolve in appropriate ways
- Providing institutional shelters for innovative futures work which perhaps could not easily be carried out elsewhere.³⁵

Institutes of Foresight can address a wide variety of requirements from the pragmatic through to the civilisational. When properly resourced, they represent a unique capability for establishing and sustaining research into ‘epoch-defining’ challenges and for providing the means to analyse, communicate and understand these challenges in actionable ways.

What should/might Philanthropy do about these epoch-defining challenges?

Establishing an Institute of Philanthropic Foresight

A purpose-focussed Institute of Philanthropic Foresight (IoPF) could be established in conjunction with one or more existing peak philanthropic bodies. This Institute could become an incubator for conducting and applying detailed foresight research that has been tailored to suit the specific requirements and desires of the philanthropic sector. This will avoid a duplication of effort at an individual organisational level and would enable deeper levels of research to occur through shared initiatives.

The work conducted under the banner of the ‘Future of Philanthropy’ project is an example of what an Institute of Philanthropic Foresight might be and do, although this initiative was probably never framed or conceived in this way. As described earlier in this paper, the work conducted so far by the ‘Future of Philanthropy’ project has generally been limited to the use of foresight in the pragmatic realms with some emphasis in the progressive realms. This level of effort is to be commended and sustained. But, as noted within the later parts of the *Looking out for the Future Guide*, the challenge for moving beyond efficiency and effectiveness lies in an exploration of the civilisational futures realm, where ‘epoch-defining’ challenges can be investigated and Philanthropy’s response defined.

The *Looking out for the Future Guide* suggested there were four principles for seizing the opportunity that lies ahead for the philanthropic sector:³⁶

1. Exploit Philanthropy’s strategic advantage – the discretionary ability to act free from pressure – to be able to take risks and be patient.

2. Seek cooperative advantage – the advantage that comes uniquely from working in concert with others – there is no need to be competitive and great opportunity in working together.
3. Embrace complexity – what type of problem/solution are you working on, what’s the problem behind the problem, how will this play out over time.
4. Invite meaningful scrutiny – diversify, share knowledge, learn more, understand which assumptions have outlasted their value.

These principles fit well with the expectations of what an Institute of Philanthropic Foresight might be charged with helping the philanthropic sector conceptualise, understand and achieve. An IoPF would have the dual roles of exploring the future and working with the sector to set desired future visions and develop associated plans to achieve these desired positions.

The work program for an IoPF could be seen to include the following:

- Provide customised and semi-packaged foresight tools and templates that individual philanthropic organisations could use to help them better understand and engage with future challenges and opportunities
- Provide an accessible, customised and evolving knowledge base about the future as it applies to the philanthropic sector
- Provide a context for the philanthropic sector to understand the scope and nature of the ‘epoch-defining’ problems that are components of the ‘Global Problematique’
- Identify the connections and gaps between these issues and the types of issues that are currently being addressed by the philanthropic sector and proposing new forms of connections
- Provide tools that help the philanthropic sector connect more fully with individuals, communities and other sectors
- Act as a role model for foresight use that encourages greater use of foresight by other sectors.

Some of these items have been in part addressed by the ‘Future of Philanthropy’ initiative. These could be further refined and developed for use in various geographies through a network of such bodies that take on a regional responsibility for further developing and sharing what has already been commenced.

These partial efforts probably won’t be sufficient to bring the full weight of opportunity that the philanthropic sector has to offer to the fore without a complementary and perhaps even more concerted effort on understanding and acting

upon the ‘epoch-defining’ problems of today. The unique ability that the philanthropic sector has to bring attention to these problems and act upon them in a committed and discretionary way, free of any pressure, is exactly what it will take to give attention to these issues whilst others ignore them. Providing resources for a full fledged IoPF or a network of IoPFs would be a step in the right direction to allowing Philanthropy to make its mark in an even greater, holistically informed way.

AN INTEGRATED AGENDA

Part Two

Foresight and Philanthropy as drivers of social well-being.

Both Philanthropy and Foresight share a core-focus of improving the well-being of society. So far in this paper, the attainment of this goal has been implied to result directly from the independent or combined application of Philanthropy or Foresight as external acts that help address identified problems or opportunities in a systemic, sustainable way. This ignores the significant benefits that might be realised if and when individuals and societies become ingrained with the use of philanthropy and foresight as everyday behaviours – automatically internalising these principles as a part of their decision-making processes.

The *Looking out for the Future* Guide concludes with the following statement; ‘Philanthropists seek the future...dreaming of new possibilities...speaking up for future generations...trying to make it better’.³⁷

The ideological foundations that link Philanthropy and Foresight at a deep level then include:

- the ultimate goal to improve the well-being of society
- the respect for the well-being of future generations
- the drive for sustainable solutions that incorporate restorative practices
- thinking and action applied in long term contexts
- interior subjective and inter-subjective truths and needs are valued as highly as exterior objective truths and needs.

The rate of improving societal level well-being could increase by focussing on this deeper ideological basis for cooperation between Philanthropy and Foresight where:

Philanthropy can rely on Foresight to create:

- an awareness of the issues and opportunities confronting society and fostering a sense of connectedness and mutual obligation that engenders philanthropic attitudes

- a sense of empowerment that even complex issues can be addressed in systemic, sustainable ways so that people are prepared to engage and contribute
- a means and the motivation for increased cohesion and effectiveness within and across the sector based on a renewed clarity of how these complex issues might be best addressed by new or revised collaborations and approaches
- an anticipatory capacity allowing proactive and informed responses to new challenges and opportunities as (or before) they emerge.

Foresight can rely on Philanthropy to help:

- develop the social trust that is needed to have people willing to engage in the discourse on complex issues and shaping futures
- fill in the gaps in equity that inevitably will arise despite even the best intentions and planning so that foresight can remain focussed on meeting new challenges
- harness funds held in trust to promote societal development resulting in higher quality of life today and allowing for the development of higher levels of foresight capability that can be applied to emergent issues and opportunities.

What might result from deeper cooperation between Philanthropy and Foresight?

A deeper level of cooperation between Philanthropy and Foresight is premised upon unlocking the potential of the common ideological foundations they share. It is about realising that change happens as much through nurturing the physical resources, institutions and capabilities that are required to promote development as it does through increasing the inner consciousness of individuals and collectives that provide the ideological foundations on which growth can occur.

The development of these ideological foundations starts with gaining a deep and collective understanding of what the issues at hand are and how these issues can and should be dealt with. The fostering of such capabilities through informed discourses and appropriate education can have profound impacts on the responses to what is being perceived today and what is acceptable into the future.

The following are speculative examples of what might be evidence that a deliberate and sustained deeper cooperation between Philanthropy and Foresight was accelerating the rate of increase in societal level well-being.

- An increase in the range and depth of discourses on foresight and philanthropy issues in day to day communication within organisations, communities and societies that is fostered by reporting in the media and governmental use
- Significantly reduced effort in advocating the benefits of philanthropy or foresight – rather there is increased effort in determining expanded application of these
- More engaged involvement in democratic processes across society by individuals that feel empowered that they can make a difference and feel obligated to participate and act in support of their opinions and values
- As anticipation becomes the norm, emerging issues and opportunities become less of a surprise; instead these are avoided or accommodated and responded to appropriately within a new and deep understanding of what is emerging in the world around us
- Philanthropy moves its focus to quality of life opportunities as the systemic and sustainable fixes that have already been applied are significantly reducing the need for charitable acts required to relieve immediate suffering or correct gross injustices
- New higher order human behaviours and capabilities are developed.

Providing philanthropic funding to the Foresight sector

Given the benefits of a deeper level of cooperation between Philanthropy and Foresight that have been conceived above, it is suggested that philanthropic funding be provided for the following:

- additional education and research in Foresight
- establishment of a network of dedicated Institutes of Philanthropic Foresight that help the philanthropic sector navigate through change and come together to work on ‘epoch-defining’ problems
- establishment of a network of National Institutes of Foresight that foster development of foresight capacity at a societal level.

The above would accelerate the adoption rate of Foresight and help set the scene for supporting the necessary discourses that further development can be built upon.

CONCLUSION

Collaboration between Philanthropy and Foresight will increase the rate at which their individual and common goal of improving the well-being of society can occur.

A basic level of collaboration would be based on Philanthropy using Foresight as a set of methods and tools that are best aligned to:

- understanding the complex dimensions in which Philanthropy operates
- providing frameworks for exploring alternative solutions to the problems and opportunities that are revealed
- formulating an agreed set of present day actions that are better aligned to shaping desired sustainable future outcomes.

The use of Foresight within individual philanthropic institutions and at a whole of sector level, within an Institute of Philanthropic Foresight, provides the ability to conceive and formulate the systemic, sustainable solutions that are being sought in an increasingly complex world. This has the additional benefit of generating desired growth in the Foresight sector – providing a springboard for accelerating advancements in Foresight as well as a living case study that can be used to promote the broader use of foresight.

At a deeper level, by recognising and building upon the common ideological foundations Philanthropy and Foresight share, there is the ability to develop a joint capability and approach to creating an environment where individuals feel both empowered and obligated to contribute to the development of society. This complements and adds significant momentum to the individual approaches currently taken by Philanthropy and Foresight to foster increased societal level adoption of philanthropy and foresight as actively used capacities.

A successful collaboration between these two sectors is seen as a self-fulfilling loop where a close association between philanthropy and foresight will accelerate the achievement of each sector's goal of improving the well-being of society. Over time, this will permit a move from the present position of needing to undertake significant corrective and regenerative activity to one where new dimensions of well-being and quality of life can be actively contemplated, explored and realised.

This paper has established the benefits of collaboration between Philanthropy and Foresight at a concept level. It is now recommended that additional discussion and research occur between the two sectors to test the validity of these benefits and determine appropriate ways of moving forward.

NOTES

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- ¹³ Bell, W, An Overview of Futures Studies, *Knowledge Base of Futures Studies*, Volume 1.
- ¹⁴ This model is adapted from Burt and van der Heidjen, *Futures* 35, Elsevier Science 2003 and Hines A, *An Audit for Organisational Futurists*, Foresight 5.1, Emerald 2003.
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- ¹⁹ Slaughter (1999) adapted from pp 287-288.
- ²⁰ Slaughter (1999) adapted from pp287-288.
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- ²³ GBN, Monitor Group, *What If? The Art of Scenario Thinking for Nonprofits*, Monitor Group LLP 2004. This is available accessible as a free electronic download from www.gbn.com/whatif
- ²⁴ GBN, Monitor Group, *Looking out for the Future: An Orientation for Twenty-First Century Philanthropists*, Monitor Group LLP 2005. The Guide is accessible as a free electronic download from www.futureofphilanthropy.org/project_final_report.asp
- ²⁵ GBN (2005) p9

- ²⁶ GBN (2005) p63
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²⁹ GBN (2005) p 22
³⁰ GBN (2005) pp 41 - 57
³¹ Slaughter R, *Where now for future studies?*, Futures 34 pp 229-233, Elsevier Science 2002.
³² GBN (2005) pp 58-59
³³ GBN (2005) pg 58
³⁴ Meadows et al, *Limits to Growth the 30-Year Update*, Chelsea Green Publishing 2004.
Quote taken from the author's preface.
³⁵ Slaughter (1999) pp 159-160.
³⁶ GBN (2005) pp 61-72
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ANNOTATED REFERENCES AND RESOURCES

Stanford Social Innovations Review

Stanford University Graduate School of Business, Centre for Social Innovation accessible at www.ssireview.com/

‘...this journal’s purpose is to lead in the search for new and better ways of improving the lot of the world’. The journal contains a wide range of articles related to the non-profit sector, corporate citizenship and philanthropic practices. Content is available online via a paid subscription and is published in a magazine format. Many articles are available for free viewing.

Future of Philanthropy Project

This is accessible at www.futureofphilanthropy.org

As referenced in this paper an emerging resource to continue the work of the ‘Future of Philanthropy’ project. Contains a number of case studies, worksheets and references. The website ‘is primarily constructed to help improve the practice of philanthropy...But it also contains material for those who are working to *change* philanthropy’ The main report and guide to scenario thinking resources produced in conjunction with this project are accessible via this web-site.

Tracey D, Giving it Away: In Praise of Philanthropy, Scribe Publications Melbourne 2003.

In this book a cross-section of Australia’s philanthropists explain how and why they give away their time and money, and how they decide which causes and organisations to support. The book provides some insights into the drive and motivation of

philanthropists and explores the many different perspectives and approaches that exist and are emerging.

On Philanthropy

This is accessible at www.onphilanthropy.com

This freely accessible website features a collection of short commentary style articles, book reviews, news updates and other items of interest to the non-profit sector. The web-site is primarily an initiative of Changing Our World Inc, a consultancy firm providing services to the nonprofit sector.

Slaughter, R, *Futures Beyond Dystopia: Creating Social Foresight*, Routledge Falmer, London 2004.

Dystopic future visions abound, but when combined with the human desire for improving future prospects, it is argued that a powerful motivation exists to rethink our approach to how we presently engage with the future. This book outlines the case for creating social foresight as an actively used capacity and discusses the progress that has been made in developing the fields of Future Studies and Foresight.

Inayatullah, S, *Questioning the Future: Future Studies, Action Learning and Organisational Transformation*.

This text provides an excellent primer on the foundations of Futures Studies and then looks at how foresight tools, methods and approaches derived from this field can be used for a variety of transformative processes.



2 | Towards a New Partnership between Foresight and Philanthropy

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In calling for practitioners from outside the Third Sector to invest some time and thought towards the great philanthropic projects, one quickly discovers that as a generation, we have been handed a two-headed chimera. At one level, the task elicits a great enthusiasm. Besides, there is a long-standing tradition of mature practitioners switching their gaze from pragmatic matters in order to investigate the human condition. Generationally speaking, we are the next link in the chain. Intellectually, we are also heirs to all the traditions accumulated during an unprecedented phase of historic continuity. We have much to offer. We are, therefore, mostly willing and able.

On the other hand, one is suddenly confronted with the need to specify precisely what malaise afflicts human society. In other words, what precisely is 'The Problem'? Located within an Age of Extremes, this question is veiled in the static conducted by a World Wide Web of interconnected productivity and a simultaneous meltdown of local social institutions. Traditional boundaries have become porous allowing for a hyperactive (sometimes hysterical) state of constant flux frequently accompanied by a low-grade sense of perpetual crisis. In other words, how do we define anything as definitive as 'The Problem' given the dynamic turbulence of the social context?

A doctor confronted with a sick patient will target the ailing organ, take a tissue sample

and charge a molecular pathologist to investigate. The scientist is in possession of a wide choice of analytical tools and will quickly elucidate a diagnosis: it's a tumour, a viral infection, or possibly a missing enzyme. But a common diagnostic toolkit for social ill-health is often little more than an intuitive bleeding heart attached to a subjective worldview striving for a perspective broad enough to capture a characteristic sample.

So what, after all that, is The Problem? Why even assume the social body is ill to any great degree? Can a methodology be enacted that permits an accurate overview of what needs to be done? Can we identify the core causes? These issues need to be resolved if the project is to make any real progress.

Samples and snippets: the depth of suffering

- In Australia, poverty levels are five percent higher than when poverty was first measured in 1973
- In 1996, on Census night, of 105,304 homeless people, one third were sleeping rough
- Twenty three percent of homeless people cite 'domestic violence' as the reason for seeking assistance
- Real house prices rose some seventy percent over the decade to 2003
- An estimated 700,000 children were living in poverty in 1997-1998 and more than a third came from 'working poor' families
- Australia has one of the highest levels of joblessness among families with children in OECD countries
- In 1999, females in full time employment received eighty one percent of the income of their male counterparts
- Aboriginal and Torres Strait Islander people die at younger ages than Australians as a whole.¹

The picture becomes far more acute if the gaze embraces the world beyond Australia's shores. The quintessential snapshot was provided by Phillip Harter at Stanford University School of Medicine.² He shrunk the world's population to a village of only one hundred people and discovered that eighty live in substandard housing, seventy are unable to read, fifty suffer malnutrition, and only one person is college educated. Before concluding that The Problem must therefore be 'poverty' (with its concurrent homelessness, hunger, deprivation), please note the following: at the time of Harter's analysis, six people possessed fifty nine percent of the wealth, all from the USA. With this last statistic, a dramatic reversal occurs in the diagnosis: the Problem may well be wealth – or at least how it is obtained and distributed.

The interesting thing about all these definitions is that they only define the poor. No-one thinks of finding labels for the rich – there are far more words for poverty than there are for wealth, as the dictionary clearly shows. It is the poor who are the problem – a belief hotly contested by ‘the poor’ themselves.³

THE QUEST FOR A DIAGNOSTIC METHOD

The contrast between Australian and international levels of distress is so vast that some local practitioners question whether Australians are actually suffering all that much. It is argued, for instance by Peter Saunders and Kayoko Tsumori at the Centre for Independent Studies, that any residual poverty or suffering in Australia is mostly due to individual lapses in either personal responsibility or individual initiative within a mostly fair and just broader society.⁴ Continued public support only encourages these personal flaws (defined as an absenteeism on the duty to perfect oneself as a model consumer). In other words, social assistance programs will only perpetuate individual laziness. The diagnosis? Australians aren’t suffering enough to merit even the current level of publicly funded social services:

If giving people money were the solution to poverty, poverty should have disappeared by now, yet the number of people requiring support has been growing, not shrinking.⁵

The redistribution strategy has failed, it is claimed, and should be dumped in favour of a ‘self help strategy’. The cure then? Reduce social ills to a personal level so as to externalise The Problem onto the individual and then somehow charge (or coerce?) that person to help himself. In other words, there is a great emphasis on a highly skilled version of social indifference.

Is such a strategy accurate and justified? Should we be authoring self-help manuals and then absconding on further involvement?

Doing nothing is, of course, a tactic that allows any number of people (no matter the level of talent) an easy route to excellence. Indifference – dressed as the very best in social policy – does sound just a little too good (and simultaneously a little too mean) to be true. However, since the policy is gaining ground nationally and is already established internationally, it should be seriously considered. A broad scan at the level of logistics (run into the future) quickly reveals a flaw. The position is tenable *if and only if* ‘The Problem’ is truly due to residual levels of *poverty* born of individual laziness. Should the problem be something else – for instance, wealth or wealth generating practices – then the prescribed dose of social indifference actually sets the stage to make things ever worse. For instance, by failing to target the personal laziness of rich

people, something we can't do if we are, intellectually speaking, too busy ignoring poor people.

The very poor tell us over and over again that a human being's greatest misfortune is not hunger or being unable to read, nor even being without work. The greatest misfortune of all is to know that you count for nothing, to the point where even your suffering is ignored. The worst blow of all is the contempt of your fellow citizens.⁶

Given that it's possible to construct The Problem both in terms of poverty and wealth it seems highly likely that fixating on one alone will prove inadequate in the long-term. Reconciling the two is the approach taken by so-called Third Way practitioners who define the core issue as 'income inequity' linked to 'social exclusion'.⁷ Before asking what people are being excluded from (and who is doing the excluding), let's be frank and admit that as stated, the Third Way hypothesis leads right back to the dreary, old Keynesian concept of 'unequal wealth distribution'. As such, this is the antithesis to the prior laissez-faire thesis.

In the current configuration, the two social policy trends exist in a polemical relationship. In a cruel twist of fate, the polemics were subsumed by the so called left and right wings of the political spectrum. In America, at least, thesis and antithesis are the standard bearers for a deeper conflict that has become the grist of an intractable and divisive culture war. Circumstances in Australia are set to follow suit unless a new way forward can be elucidated that transcends the political trenches.

Transcending the deadlock

Despite the scale of the noise and static associated with this policy debate, the culture war lives off a shallow political dynasty: both sides are perfectly devoid of profound ideas about the social fabric and what ails it. When all is said and done, both sides would prefer (and to some extent have) relinquished responsibility for the social sector (primarily to charitable organisations) while downsizing welfare in favour of tax cuts and fiscal responsibility. The ultimate signifier of this entire intellectual lineage is whether the tax cuts and budget surpluses benefit the rich or the poor or the great lump in between. But in terms of the broader social structure it doesn't really matter. These tactics maintain the fundamental status quo. The shape, breadth and height of the associated housing/health/community bell-curves remain essentially unaltered.

So has the search reached a dead end? Certainly any logician will, at this juncture, predict that the underlying logic to these policies has reached the point of collapse. To better highlight the form this collapse takes, consider the following two big-picture statistics:³

1. *In the last fifty years, poverty has fallen more than in the previous 500 years.*

[Which implies the problem all along wasn't just poverty but the residual poverty perpetuated by the previous and failed system of governance. The solution is more of whatever we were doing to generate wealth in the last fifty years.]

2. *The absolute number of poor people is increasing as the world's population rises.*

[Which implies the current system has an inherent capacity to perpetuate problematic varieties of poverty that recapitulate social and environmental ills. The solution is less of whatever we are currently doing at the level of wealth generation.]

First, it is necessary to identify the dominant economic model of the previous decades. It is then possible to follow through and draw the quintessential conclusion: to alleviate poverty we *simultaneously* need both more *and* less of it. We arrive, inevitably, at a causal paradox.

The hallmark feature of this paradox is the following. It is possible to evidence the truth of two statements: 'the dominant economic model alleviates poverty' and 'the dominant economic model increases poverty'. The factual evidence combines with the overall contradiction and renders each assertion neither properly true nor false. A law of formal logic (namely Aristotle's law of the excluded middle) has reached the point of collapse. To anybody trained in logic, the state of the overall conclusion is deeply familiar.

Over seventy years ago, mathematicians demonstrated something very important about truth, proof and evidence which I'm going to apply to this conundrum. Logicians were able to figure out why the neither-true-nor-false situation occurs.⁸ Applying those insights to this project allows for three propositions.

Three propositions

Firstly, the economic model under consideration is expected to be the product of what foresight practitioners call formal-operative modes of cognition. That is, to conventional forms of rationality. Secondly, the real-world system analysed by this mindset is expected to involve a *dynamic* system (infinitely variable and capable of self-referential states). It is the collision of a conventional observer with a dynamic reality that leads to rationality's point of collapse. This variety of thought is at its best when reality's turbo-charged creativity is standardised: as scientists do in lab-contrived experiments and as engineers do when building machines. In fact, the popularity of this mindset partly stems from the success of classical theories during the scientific revolution. This is the cognitive style that gave us Man as a lumbering

robot and the Universe as mechanical clockwork. It is a powerful but inadequate mindset given the complexity of the actual universe as demonstrated by Einstein (who collapsed Newton's clockwork universe) and by every other scientist who transcended classical theories (for instance, in the production of quantum mechanics or complexity and system theory).

That classical mechanics were transcended tells us that a post-formal mode of cognition is available to humans. That the resultant theories were even more accurate suggests that moving beyond the conventionally rational worldview is well worth the effort.

The antidote to concepts that are neither-true-nor-false (concepts that produce paradoxical outcomes and intensely polarised debates) is unlikely to take the form of yet another classically rational idea. The task is to transcend the limitation inherent to the formal-operative worldview while retaining its coherent structures. Post-formal stages of cognition are not only possible but vision-logic (a post-conventional variety of rationality) is particularly suited to solving this breed of causal paradox. The search for a methodology for innovative social engagement now has a *modus operandi* but one with the potential to transcend the polemics, to short-circuit the culture wars while innovating social engagement. The situation suddenly looks far more promising.

The third proposition, however, also specifies why the above approach – despite its inherent simplicity – frequently fails to take hold. The paradoxical state of the overall conclusion constitutes a ‘Truth’ that is not available to the rational observer who is situated *within* a system (i.e. situated as a player with a vested interest in the dominant economic model). From *within* the formalism of Third Way theory or laissez-faire models, the argument acquires an absolutist momentum because each, in the immediate sense, is extremely logically compelling. To believe anything else is considered irrational by the practitioner and ‘irrationality’ is equivalent to ‘untruth’ in the form of chaos, disorder and confusion. Unfortunately, creative or dynamic systems (that are eminently organised and full of a very special kind of order) nonetheless can seem chaotic, they are indeed entropically challenged (entropy drives towards increased disorder) and because outcomes cannot readily be predicted they are also confusing and seemingly uncontrollable. They can resemble disorganised systems. The loss of control (disorder) is what rationality fears and, as such, there is a distrust of creative processes. With a self-imposed leash on our own creativity, practitioners become fearful of moving beyond formal logic even if that shift offers better (more accurate and efficient) forms of order. This constitutes a formidable challenge to productive re-engagement with social issues.

Devising a strategy

Testing the above predictions is fairly straightforward. What is the dominant economic model? The answer to that question is uncontested. Society is operating under the aegis of a free market ideology based in large part on Adam Smith's neoclassical school of economics redeployed in the 1970's to renew the post-war Keynesian consensus. How representative is it of the formal operative style of cognition?

Modern capitalism elevates a certain form of rationality to a higher plane. Consumerism and the logic of capitalism are intensely bound up with the rationality of money. As Norman Brown observed, "Money reflects and promotes a style of thinking which is abstract, impersonal, objective, and quantitative, that is to say, the style of thinking of modern science – and what could be more rational than that?"⁹

If neoliberalism is truly a 'classical' theory, in the scientific sense, then it should possess certain hallmark features. For example, molecular biology in its formal-operative mode, sees the mutually influential relationship between genes and environment but experiences it as descriptive complexity. To surmount this impasse, the gene is *reduced* to the cause of the organism (for example, the gene for alcoholism). In this way, the mindset births genetic determinism. The determinism annihilates the mutual interdependency between parts and wholes in favour of linear cause-effect relationships in which the gene commands and the organism obeys. Instead, vision logic sees genes as holons: wholes that come with an in-built (and creative) ability to form the parts of a higher order system. The standard example of holonic organization is provided by this sequence: atoms to molecules to cells to organs to organisms.¹⁰ By identifying how holons manage these sequential integrations, vision logic arrives at more refined notions of biological causality. In contrast, the formal-operative mindset sees disparate bits and pieces held together by the selfish drive to survive and reproduce. In much the same way, if neoliberalism is truly a classical theory, it should be cutting across a web of integrated holons in order to isolate a reduced unit which is then elevated as the source of a deterministic kind of order. In which case, what is neoliberalism's reductionist unit?

Because most people would prefer to receive higher income and enjoy higher expenditure, GDP per person seems a natural measure of the economic well-being of the average individual.¹¹

Money. And finally, what integrated web has neoliberalism negated in the process of constructing a deterministic relationship between money and well being?

Politicians continue to offer only one solution: a system based on laissez-faire economics, the culture of consumerism, the power of finance and free trade. They try and sell it in varying shades of blue, red, or yellow, but it is still a system in which the corporation is king, the state its subject, its citizen consumers. A silent nullification of the social contract.¹²

The cause of The Problem? As eulogised by Benjamin Barber: ‘the global market economy has globalised many of our vices and almost none of our virtues.’¹³

As a generation we need a new method to counter the deliberate disengagement with issues of the human condition. This method needs to be an amalgamation of technical expertise (that transcends entrenched but paradoxical operating strategies), innovation (that embraces rather than fearfully shuns the creativity of vision logic) and virtue (the ability to enact a new set of values to complement the profit motive). In brief, we need to perceive and act with virtuosity in order to create a realisable vision for a better future.

METHODOLOGY AND RESULTS

Money has become the measure of all things; economic growth the means to improving well being. But underlying this ideology is a social contract in the grip of death throes.¹⁴ Emergency intervention is required or the next generation will have little more than a corpse to bury in the way of social engagement. We have four basic options:

1. Intervention within the current system
2. Imposition of an alternative system
3. Regression to a prior system
4. Collapse the system.

Needless to say, this research project will limit itself to the first option for the simple expedient that system analysts have already visited this topic and a ‘system map’ for social problems already exists.

Systems map

In *Places to Intervene in a System*, Donella Meadows recounts how Jay Forrester of MIT was asked by the Club of Rome to explain how the ‘major global problems – poverty and hunger, environmental destruction, resource depletion, urban deterioration, unemployment – are related and how they might be solved’.¹⁵ Forrester promptly proceeded to identify the ‘leverage point’ (or the place in a complex system where a small shift can produce big changes): growth. Basically, humans are trying to solve

the costs associated with growth (resource depletion, environmental destruction, urbanisation) with more growth while failing to spot the causal paradox:

The world's leaders are correctly fixated on economic growth as the answer to virtually all problems, but they're pushing with all their might in the wrong direction.¹⁵

One of the core insights produced by systems theory is that humans have an intuitive ability to spot leverage points in even very complex systems but tragically push them in self-defeating ways. This insight has clearly been absorbed to some extent as evidenced by the advancement of strategies like pro-poor growth, fair trade, debt relief: each a noble effort to push the lever in the other direction. Why hasn't more progress been made? Here is Meadows on this very subject:

We know from bitter experience that when we do discover the system's leverage points, hardly anybody will believe us.¹⁵

In fact, foresight practitioners would anticipate that perhaps one percent of the population can witness and honour (believe) the necessities inherent to system-truths.¹⁰ That is an insufficient number to attain critical mass behind a social movement. The system map needs to be boosted with a finer understanding of how humans arrive at and sustain their beliefs.

Integral psychology: a developmental framework

How do humans come by their beliefs? That beliefs are not particularly truth-based is obvious. The material world may well possess an innate objectivity (which can be truthfully known) but that knowledge is mediated by the subjectivity of the observer. In the process, subjective worldviews are created that are amalgamations of self-identity, cognition, values and beliefs. According to Integral psychologists, the truth – from childhood to mature adult – grows with the organism.¹⁶ Consequently at any one point of time, there are levels of truth active simultaneously within a society: levels inherent to pre-conventional, conventional and post-conventional stages of development.¹⁶ It's not so much that the truth can change (as postulated by moderate forms of postmodernity) or that there is no truth (as postulated by extreme forms of postmodernity) but rather that the level of subjectivity of the observer *must* change if a child is to make his/her way to a mature adult human being.

The problem with systems analysis is that it aims for objective truth that is hopelessly dissociated from the subjective beliefs prevalent in society. Worse, systems theory failed to expound a set of values altogether (primarily because practitioners were deliberately trying to remain 'unattached' in terms of beliefs/values since these carry unstated

but paradigmatic assumptions). The resultant knowledge base will therefore seem unfamiliar and somehow foreign, irrelevant or sterile given that the societal norm prefers a firm attachment between what is believed true and what is believed beneficial/benevolent (values). For example, note the juxtaposition in the statement: Growth is good.

To explore the domain of beliefs entails overcoming a certain phobia that academia has acquired with regards to discussing ‘values’. Yet observe the crucial role values play in each of the following:¹⁵

- People who are paid less are worth less
- Evolution stopped with the emergence of Homo sapiens
- One can ‘own’ land.

As Meadows points out: ‘The shared ideas in the minds of society ... constitute that society’s deepest set of beliefs about how the world works.’¹⁷ These shared beliefs constitute the invisible ‘assumptions of our culture, all of which utterly dumbfound people of other cultures. [Beliefs] are the sources of systems.’¹⁷

The paradigmatic beliefs need not be true for the system to work. The beliefs, however, do need to be compatible with the developmental needs of human beings, preferably in a way that facilitates growth to our highest potential. In the reverse relationship (i.e. with the lever pushed in the wrong direction), the shared beliefs survive at the cost of people and their developmental potential. In other words, this is the leverage point and it is currently set with too great an emphasis on the integrity of ideological beliefs while lacking sufficient synergy with the developmental needs of humans. When anti-human beliefs are sustained at a global level, the resultant system can thwart humanity and the damage done is directly proportional to how fervently the ideology is believed. Hence, the danger inherent to fundamentalist zealotry.

The beliefs inherent to a system, then, come in two varieties: they are either a parasite or symbiont of human development. Either way once a system is in place, the beliefs that underlie it will reflect the mindset (the subjective stage) of the dominant players:

If you want to understand the deepest malfunctions of systems, pay attention to the rules, and to who has power over them.¹⁸

The operating strategy takes on the characteristics of its human operators. Since humans can undergo development to beliefs and ideas that are essentially symbiotic (rather than parasitic), it seems a safe bet that systems can follow suit. As such, the very act of assisting humans reach and express their full potential implicitly can feed back and

amplify into systematic self-correction. If sufficiently effective aid can be provided then philanthropic projects come with an in-built dynamo that can generate the kind of momentum to shift a system.

The key is to embrace philanthropic values and carry into these projects an understanding and commitment to human developmental processes such that beliefs can be identified that sustain pro-human and pro-environment values. A developmental framework of exceptional breadth, depth and height is provided by Ken Wilber in Integral Psychology.¹⁶

One final note. All of the above has been said far more simply by someone with first hand experience of a parasitic system:

When everything is valued in terms of money, it is those who have the money who are looked up to. But if we use other ways of valuing people ...³

Values and virtue are inextricably linked in a way that requires its own vocabulary, a vocabulary that transcends the sterility of unattached truths. However, the only tenable site in which to develop narratives about ‘other ways of valuing people’ is the future. Foresight practitioners, aware of this fact for a number of decades, have made enormous strides creating the expertise to convert yearning/longing into strategy:

Futures Studies is not simply about any future. It is about the future well-being of people. It is an action science, and the action is social in the broadest sense, including the political, the economic, and the cultural. As such, Futures Studies aims to produce knowledge and foresight that can be used by people to steer toward more consciously-chosen futures. Thus, Futures Studies places as much emphasis on the utilization of knowledge as on its production ... Also, futurists explore values and the nature of the good society ... This means that futures researchers must devote some of our time to the study of human values and we must be responsibly concerned about the future consequences of our work.¹⁹

The goal, in the immediate sense, is for values that sustain symbiotic (rather than parasitic) beliefs so as to lay the foundations for a more virtuous system. To achieve this, the dynamo inherent to philanthropic projects needs to be turbo-charged with the both the strategic vision of foresight practitioners and the pragmatic creativity of entrepreneurs. Armed with a systems-map and values-map, the next step involves assembling the team to undertake further, more refined analysis in practical rather than theoretical terms.

The team

The project of engineering a new vision of social engagement was differentiated among three sets practitioners each associated with particular skills:

1. *Entrepreneurs*: Unlike their business peers more generally, entrepreneurs are fearless in the face of creative innovation, progress, technological change and are masters at spotting and capitalising on barely perceivable gaps and deficits in the market. As a breed they are less reliant on command-obey procedures, on reducing and quantifying every aspect of an operation in order to control it. They are characterised by a dynamic operating style rather than a mechanical one and as such do not distrust relinquishing control to intuition, instinct, spontaneous insights and networks wherein vision logic can thrive. Furthermore, their dynamism includes a capacity to ‘dive in and have a go’ that can generate momentum for even unlikely projects. Finally, they are skilled in generating the venture capital for risky or explorative projects.²⁰
2. *Foresight practitioners*: While the term ‘futurist’ is associated with predictive techniques (forecasting and modelling), foresight practitioners differentiate themselves by a greater emphasis on critical and analytical approaches to the normative drivers (to those trends, processes, beliefs and ideas that ensure the continuation of the status quo). These analytical techniques already incorporate the developmental framework of Integral psychology. In addition, they have devised methods to facilitate envisioning realisable alternative futures in conjunction with the techniques to facilitate organisational transformation. They are master planners when it comes to realising deep structural change. Importantly, they are not ‘values-free’ but openly favour an ethical regard for human developmental needs.²⁰
3. *Philanthropic foundations and non-profit organizations* (NGOs): These are the practitioners with years of insider experience working in areas where the social fabric has unravelled. They are familiar with past approaches and contemporary assets/deficits in terms of service delivery for the disadvantaged. They have already developed some cross-sector networks and built capacity, resources, funding and volunteers to deliver aid to those who need it and to feedback ideas to the policy makers.²¹

The Australian Foresight Institute at Swinburne University of Technology hosted the initial process that conceived, analysed and enacted an opening strategy (the development of ‘social foresight’). In the second stage, a partnership was formed between foresight practitioners and NGOs in order to run a pilot study within the social sector in Victoria. Additionally, a program was outlined for future R&D opportunities in order to build the broader alliance.

Trial run and further opportunities

In 2004, the Victorian Council for Social Services (VCOSS) circulated for comment a futures-oriented strategic plan covering the period 2005-2008. The AFI submitted a response to the VCOSS strategic plan, including among its recommendations that the peak body engage with professional foresight practitioners to help determine the value of foresight methods to the sector.

VCOSS defines itself as a peak body that represents over 7,000 non-profit organisations in the health, housing and community sector. It also claims a mandate as a nationally networked policy and advocacy body: ‘the challenge for VCOSS is to use our independence and advocacy to both strengthen sectoral capacity and to bring about better outcomes in core social policy areas central to quality of life and well being.’²²

Improving social outcomes for disadvantaged Victorians traditionally involved advocacy at the level of social policy. However, the economic reforms of the 1990’s – which were particularly hard felt in Victoria – saw an erosion of these channels and a decline in sector capacity:

Over the decade of the 1990s in Victoria in particular, social budgets were cut, departments were downsized, State owned enterprises were sold off and the privatisation and contracting shifted governance and policy capacity from the public sector into what are now emerging as less accountable oligopolies or monopolies. [...] In terms of governance, bureaucratic and civic accountability changed to a narrow budget-driven model. The public and community sectors were politicised and silenced during this period.²³

Facing a looming viability, capacity and credibility crisis, peak bodies from across the social services sector have engaged with VCOSS to revision how best to pursue goals of social justice within the new economic reality. While a number of projects and programs have been tried in partnership with the public sector, VCOSS also opted to launch an independent initiative under the banner of social sustainability. This initiative directly tackles the question of how to sustain standards of social and community engagement at a time when the social contract is in decline: ‘... the key challenge for VCOSS over the next five to ten years is to strengthen communities and to contribute to the achievement of an egalitarian society that invests in its people and protects and advances the interests of those who are disadvantaged.’²³

It is in this arena that foresight joined forces with the non-profit professionals in a trial-run of joint development processes. The trial-runs were undertaken under the umbrella of the AFI’s broader social foresight research program. Each trial resulted in a report being produced for the associated sector working group, while the overall

impact of this R&D model was assessed in a research report produced on behalf of Swinburne University of Technology.

As part of the sustainability project, the AFI hosted the inaugural event which took the form of a facilitated, day long workshop designed by Rowena Morrow and Chris Stewart with input from Joseph Voros, Peter Hayward, Jose Ramos and assistance from Josh Floyd, all from the AFI. Briefly, the workshop involved practitioners from both domains collaboratively translating sector goals into workshop processes. A pre-event questionnaire was designed to prompt reflection about the issue of sustainability and was used to refine thinking what the project means to the participants. On the day, the workshop progressed through a six-step process:²⁴

1. **Clearing:** to open up the room through a clearing process which allowed participants to ‘park’ those top of the mind ideas arising from workplace and family life.
2. **Situation analysis:** including the Collaborative Alignment Model that used a questionnaire to evaluate where the direction of participants’ thinking in the issue of sustainability.
3. **Identity and values exercise:** these processes were used to encourage participants to describe the boundaries and values of the sector including what makes the sector unique and what values the sector shares. A questionnaire was provided as output for further study.
4. **Visioning:** this process asked participants to imagine their preferred future and then to discuss their visions and identify common themes or ideas.
5. **Mapping and innovation development:** once the visions had been generated, they were captured on a four quadrant matrix and each quadrant group was asked to identify innovations which could be undertaken in an eighteen month timeframe.
6. **Innovation champions:** this process allowed participants to review the innovations and take responsibility for coordinating the realisation of the resultant six actionable plans.

After the workshop, the AFI was faced with the task of evaluating the impact of the combined social foresight approach. At the time it was noted that the vast majority of strategic plans are never utilised and effectively gather dust in filing cabinets. In contrast, the joint AFI sustainability workshop was effective in eliciting a number of developments that include:

- The formation of a task group formally authorised to enact strategy and carry

the project forward. Henceforth the group will be referred to as the Sustainability Committee.

- The adoption of an action and futures-oriented identity enabled, in the first instance, by the existence of six actionable plans formulated during the workshop and geared towards innovating outcomes within an eighteen month framework spanning into 2006.
- The desire on the part of a sub-set of the Sustainability Committee to extend the planning timeframe to at least 2010 but preferably longer.
- The desire to ‘do the hard work’ of cohering identity and values, as recommended in the AFI report, and therefore build the capacity to master long-term change processes.
- The willingness on the part of individual peak bodies to spend between \$5,000 and \$10,000 a year towards building the know-how and the capability to attain truly innovative social outcomes.
- The creation of an agenda for implementation of three strategies based on hybridising the actionable plans developed during the workshop.

A more self-sufficient sector able to engender new partnerships, renew its relationship to the broader public and pursue alternative images of the future is already emerging in the plans, agendas and goals of the Sustainability Committee. Only time will tell whether the sector is able to use this vehicle to grow and develop its way out of the current viability crisis. But in so far as the combined foresight/sector approach was able to pose and answer the ‘what do we do about it’ question, the approach did succeed in both breaking the tumultuous deadlock to innovation in the present and regain a proactive sense of agency relative to the future decline of the social contract within Victoria.

Foresight continues to be needed, primarily with regards to the fact that a single workshop is insufficient to fully flesh out a vision of a sustainable future. Ultimately the sector itself has specified the desire for the visioning work to continue and culminate in a fully fledged scenarios exercise. Furthermore, the manner of plans that are being undertaken by the Sustainability Committee have a tendency to involve another class of sector ‘outsider’ (in the role of sector champions). These ‘outsiders’ are defined as enterprising individuals who are known, admired and trusted by the public as iconic innovators able to push the limit on what is considered possible. In short, the workshop saw a natural evolution of its futures thinking to encompass the entrepreneur. The sector itself is overseeing the recruitment and involvement of these enterprising individuals, a turn of events that could constitute one of Australia’s more remarkable examples of authentic social entrepreneurship.

To assist the growth of these kinds of projects would require the continued input from the AFI's social foresight program. The research program has identified two ways in which such continuing efforts could be funded. Firstly, the visioning work can be undertaken as a three year project structured as a scenarios forum that implicitly involves the social sector, philanthropists, foresight practitioners and entrepreneurs. In this format, the project meets the grant criteria of a number of community support schemes such as the grants provided by the Department for Victorian Communities (DVC) in the form of \$500,000 Community Support Funds that could in turn be administered by Swinburne University of Technology. An alternative format has been proposed by Serafino de Simone and takes the form of a joint philanthropy-foresight program whose most ambitious form involves an institute structured as an independent organisation. (See accompanying essay.) Of course, the two approaches could be combined in various ways.

In the final analysis, the trial-run demonstrated the necessity and feasibility of this kind of futures-oriented social change enterprise. As part of the broader research exercise, a model for social change is emerging, realistic funding models have been identified and a variety of institutional structures are being nominated as vehicles for ongoing engagement. What remains to be done is to state the 'business case' for this R&D model among philanthropists and entrepreneurs.

CONCLUSION

At the London School of Economics, Helmut Anheier and Diana Leat undertook a similar initiative to rejuvenate engagement with humanitarian and environmental issues. They took a different methodological route and concentrated, in the first instance, on a very broad scan of philanthropic foundations. They were interested in criteria that better allow foundations to act as catalysts that identify new solutions for entrenched social problems. Their study was published in a book entitled *From Charity to Creativity*.²⁵ Despite the methodological differences, both the London School of Economics and the Australian Foresight Institute studies converged in their core findings. For instance, both identified 'creativity' as a definitive ingredient in emerging recipes for social improvement; both studies identified the need to involve outsiders in philanthropic projects:

Real creativity and innovation require new approaches, new combinations, and a mix of perspectives, cultures and disciplines. They need outsiders to give freshness and all the virtues that go with lack of insider knowledge and first impressions. They need insiders to provide deep knowledge and understanding. If foundations are to be creative and innovative in their own

thinking and in their grant-making, they need to find ways of ensuring access to diverse, varied talents and ideas. They need to be able to combine access to deep knowledge and understanding with access to those who can see things in a fresh light unencumbered by preconceptions from the past.²⁶

The Melbourne based effort used social foresight²⁷ as its methodological approach and as such, was able to define what it is about creativity and outsiders that stands to make a big difference. Foresight methods qualify ‘creativity’ and ‘outsiders’ within two broader frameworks: causal-layers and Integral-developmental maps. As such, the foresight approach is eminently aware that creativity isn’t one property. On the contrary, there are as many varieties as there are stages in human development. For instance, creativity in a bacchanalian sense won’t do at all in these kinds of projects. There is no point confusing the creativity of pre-conventional stages with the needed variety associated with post-conventionality. In Integral psychology parlance, this is known as the pre/post fallacy (the ease with which pre- and post- conventional stages are assumed one and the same).¹⁶ We don’t just need more creativity; we need the creativity born of hearts, minds and souls alive to vision logic.

Similarly with the term ‘outsiders’: the last thing the philanthropic system needs is more ‘economically correct’ outsiders who are blind to the causal paradoxes inherent to some conventionally rational ideas. That kind of outsider can accidentally produce *disengagement* from social causes (‘the nullification of the social contract’) and therefore movement in the wrong direction.

While it is promising that these kinds of studies can, and have, made some progress, it is important to recall that some truths struggle to be recognised and believed. Initially, at least, they may appear to have little impact. Foresight practitioners understand this phenomenon in relation to the Integral and developmental framework. Pre-conventional stages have trouble witnessing conventional truths. Conventional stages struggle with post-conventional insights and disregards them as pre-conventional nonsense.¹⁶ It becomes crucial to note that the societal centre of gravity in Australia is located around the mid-levels of the conventional stage and is associated with a long list of very fine achievements. What is needed here is not a full scale assault and frontal attack on conventional institutions, achievement and beliefs (even its neoliberal economic ones). The conventional stage is the foundation (not the nemesis) and the portal (not the enemy) of post-conventional insights. You can’t destroy the former without undermining the latter.¹⁰ Each needs each other. The task at hand is about *complementing* conventional thinking. In particular by identifying its causal paradoxes (usually signed by a heated and rather prolonged polarised debate) and using vision logic to identify small gestures that have a big, virtuous impact.

NOTES

- ¹ Mission Australia (2001) 'National social trends', Research and Social Policy Series.
- ² Phillip Harter cited by Wilber, K. (2000), *A Theory of Everything*, Shambhala, Boston, USA. p57.
- ³ Van der Gaag, N. (1999), 'Poverty: challenging the myths', New Internationalist online, issue 310.
- ⁴ Centre for Independent Studies (2002), 'Senate Community Affairs Reference Committee: inquiry into poverty in Australia', submission by The Centre for Independent Studies.
- ⁵ Centre for Independent Studies (2002), 'New strategy needed to tackle poverty in Australia', media release, Centre for Independent Studies.
- ⁶ Roberts cited by Van der Gaag, N. (1999), 'Poverty: challenging the myths', New Internationalist online, issue 310.
- ⁷ Hamilton, C. (2003), *Growth Fetish*, Allen & Unwin, Crows Nest, Australia.
- ⁸ Davis, M. (2000), *Engines of Logic*, Norton, London UK.
- ⁹ Hamilton, C. (2003), *Growth Fetish*, Allen & Unwin, Crows Nest, Australia, p53.
- ¹⁰ Wilber, K. (2000), *A Theory of Everything*, Shambhala, Boston, USA.
- ¹¹ Hamilton, C. (2003), *Growth Fetish*, Allen & Unwin, Crows Nest, Australia, p11.
- ¹² Hertz, N. (2002), *The Silent Takeover*, Arrow Books, London, UK, p6.
- ¹³ Barber, B.R. (2001), *Jihad versus McWorld*, Ballantine Books, New York, USA.
- ¹⁴ Hertz, N. (2002), *The Silent Takeover*, Arrow Books, London, UK.
- ¹⁵ Meadows, D.H. (1997), 'Places to intervene in a system (in increasing order of effectiveness)', *Whole Earth*, vol. 91, 78-84, p78.
- ¹⁶ Wilber, K. (2000), *Integral Psychology*, Shambhala, Boston, USA.
- ¹⁷ Meadows, D.H. (1997), 'Places to intervene in a system (in increasing order of effectiveness)', *Whole Earth*, vol. 91, 78-84, p84.
- ¹⁸ Ibid, p82.
- ¹⁹ Bell, W. (2002), 'A community of futurists and the state of the futures field', *Futures*, vol. 34 (3-4), 235-247.
- ²⁰ Hayward, P. and Voros, J. (2004), 'Foresight and entrepreneurship', 282-297.
- ²¹ De Simone, S. (2005), 'Philanthropy and foresight: a partnership for accelerating societal level well-being' In this monograph.
- ²² Victorian Council of Social Services (2004), 2005-2008 Strategic Plan, Draft Report, p4.
- ²³ Ibid, p3.
- ²⁴ Morrow, R. and Stewart, C. (2005) Workshop report: community sector sustainability and viability, unpublished report, pp3-4.
- ²⁵ Anheier, K.A. and Leat, D. (2002), *From Charity to Creativity*, Comedia, Near Stroud, UK.
- ²⁶ Ibid, p18.
- ²⁷ Slaughter, R. (1996), 'Future studies: from individual to social capacity', *Futures*, vol. 28 (8), 751-762.

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FORESIGHT AND PHILANTHROPY: TOWARDS A NEW ALLIANCE

ABSTRACT

This monograph illustrates that foresight and philanthropy have many common themes and argues that at the intersection of the two is an opportunity for both to accelerate the achievement their shared goal: the improvement of well-being in societies. The ninth in a series aimed at 'Creating and Sustaining Social Foresight', it challenges both fields to join forces to find new purposes, assume new forms and develop new approaches.

In his introduction, Richard Slaughter calls for foresight and philanthropy to work together to locate post-conventional sources of long-term solutions. Serafino De Simone examines the opportunities for collaboration between foresight and philanthropy and outlines the benefits this may deliver to both fields. Finally, Gio Bradotti takes a fresh look at the thinking that stands behind social 'problems' and reports on a research pilot undertaken through the Social Foresight Research program at Swinburne University.

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Richard Slaughter is a futurist of international standing with a PhD in Futures Studies. He is the author and/or editor of eighteen books and has written numerous articles and papers on futures themes and methodologies. His work is widely used, quoted in the Futures literature and employed in undergraduate and post-graduate courses around the world.

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Giovanna studied life sciences at Monash University prior to completing a PhD at the University of Adelaide. She performed post-doctoral research in molecular genetics at the Institute of Molecular Pathology in Vienna, Austria, and the Netherlands Cancer Institute in Amsterdam. In seeking to refine and adopt more advanced analytical tools, she joined the AFI in 2004 as a Research Officer and investigated models for social change by researching overlaps between foresight, entrepreneurship and the philanthropic sector.

