

# THE FOUR FUTURES OF GENEROSITY

Scenario Mapping 2035



# Executive summary

## The challenge:

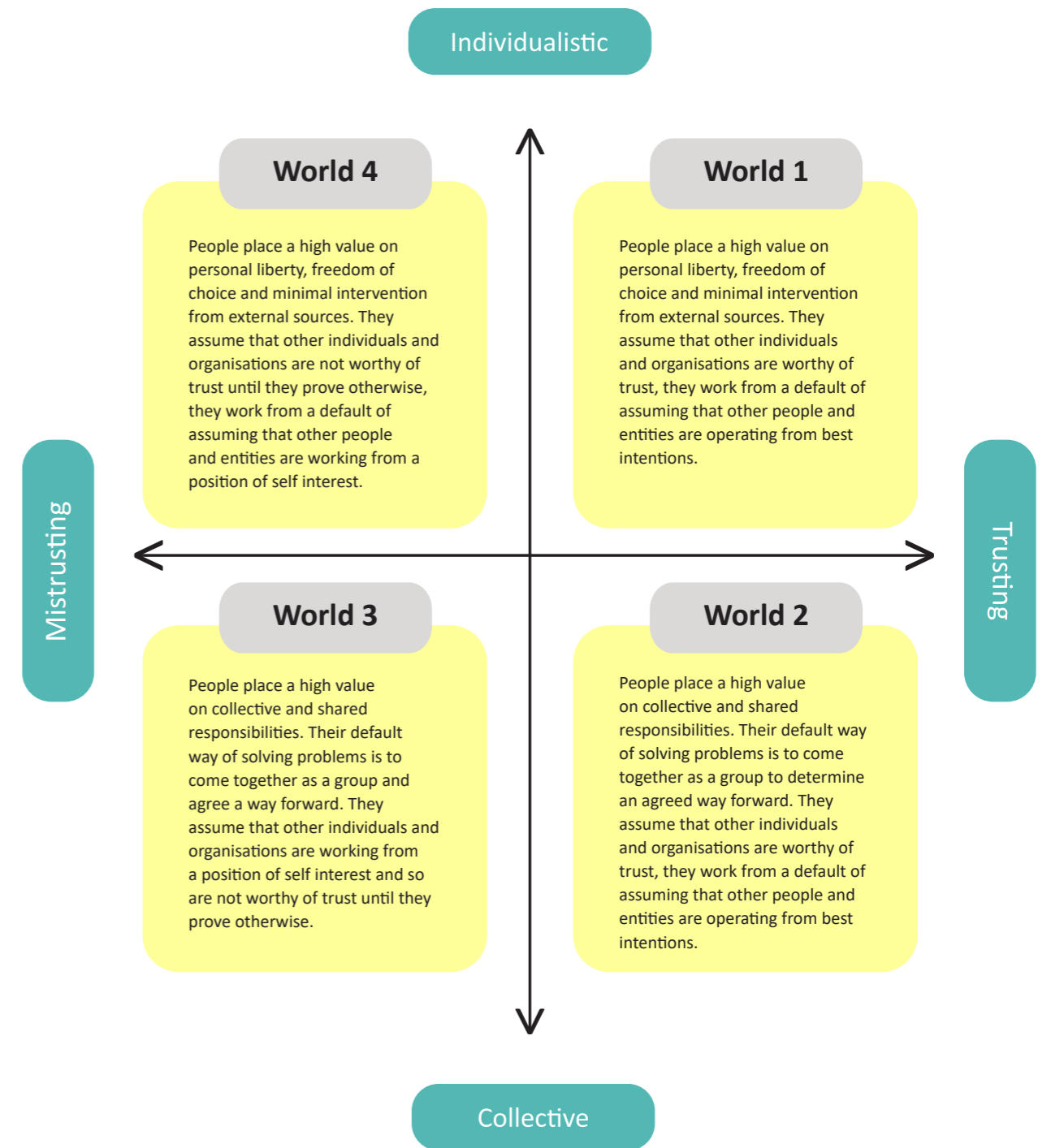
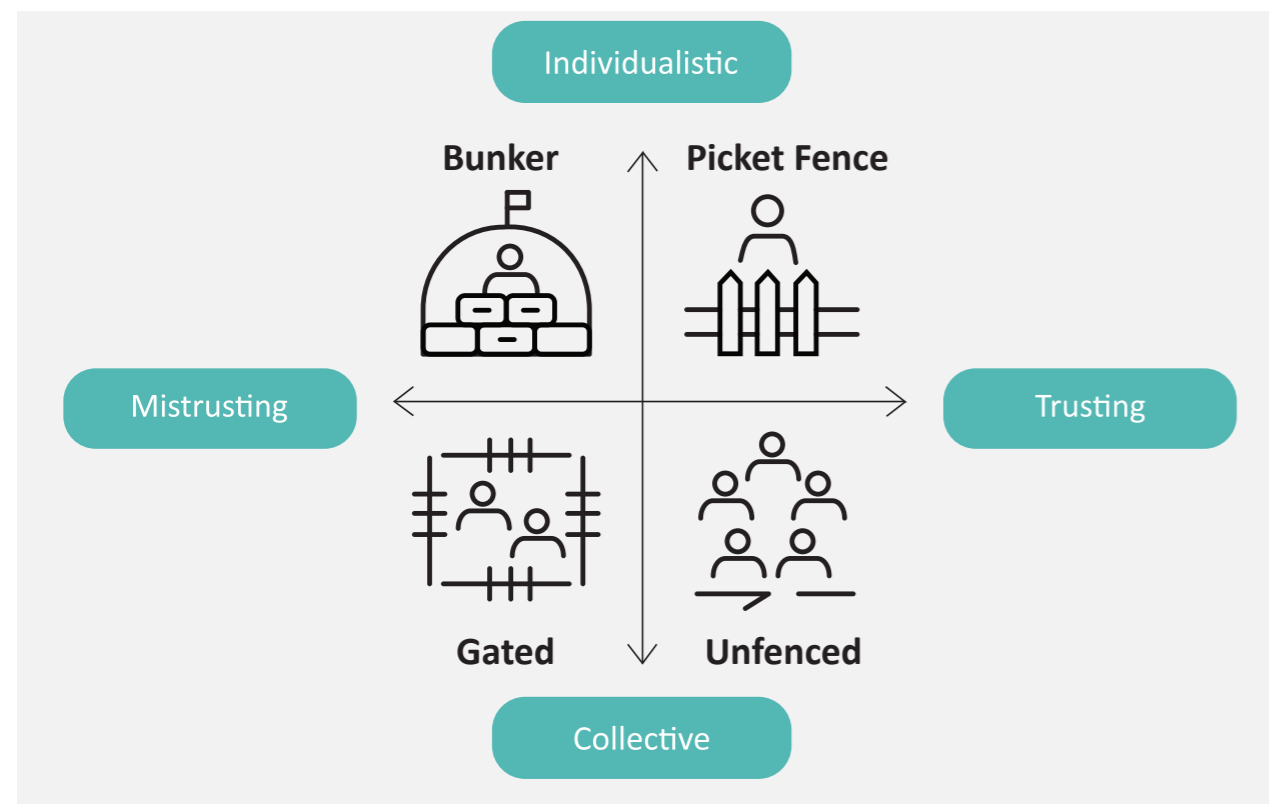
Not-for-profits (NFPs) face many of the same challenges and tensions as other organisations, such as navigating growth with limited resources, prioritising between short-term and long-term challenges, and centralising versus decentralising. In addition, NFPs are dependent on the support of a donor base. How might the size of this donor base and type of generosity change in the future? What factors drive supporters' decisions to engage or retreat? How might these drivers change and evolve?

This report sheds light on how society may evolve and the implications for not-for-profits. It does not aim to provide a roadmap but to stimulate conversations that are too often missing about "what might be".

## Our approach:

Through extensive desk research, a two-day Futures Retreat, and a series of workshops with diverse audiences, we identified Four Future Scenarios based on how society may shift regarding the balance between an individualistic and collective mindset and the levels of trust in organisations and others. We then examined how these societal shifts might affect generosity and the ways NFPs may need to respond.

## The output:

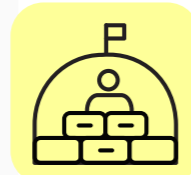


# Implications for each world

There are implications for NFPs for each of these possible four worlds that may emerge and common themes that NFPs need to consider across all worlds.

## Implications for NFPs of each possible world:

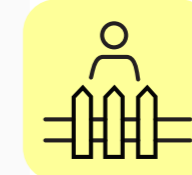
*“ In this world, direct giving platforms thrive as individuals support individuals.”*



**Bunker World (Individual / Mistrusting)**  
If society moves towards the Bunker World (Individual / Mistrusting), NFPs may need to increase their efforts to:

1. Build relationships through connected ambassadors and cede control to supporters.
2. Prove impact and demonstrate fair treatment of employees and beneficiaries.
3. Become enablers rather than providers; help people help themselves in fundraising and services.
4. Innovate and offer bold solutions to intransigent problems to overcome societal frustration.
5. Earn and protect fragile trust and prepare for scepticism and scrutiny.

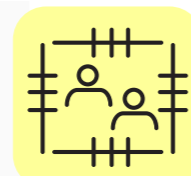
*“ In this world, subscription and sponsorship fundraising thrive as people seek personal benefits from giving.”*



**Picket Fence World (Individual / Trusting)**  
If society moves towards the Picket Fence World (Individual / Trusting), NFPs may need to increase their efforts to:

1. Tailor communications to meet the personal benefits of status, learning and recognition supporters seek from their generosity.
2. Frame messages around motivations that appeal to insurance and protection-based giving.
3. Publicise charismatic leaders and run celebrity-led fundraising campaigns.
4. Create mechanisms to connect individuals who care to those in need and develop subscription-based relationships that offer tangible, explicit benefits.
5. Promote those striving to help themselves and show the impact of programs on individuals.

*“ In this world, community and crowdfunding fundraising thrive as communities support themselves.”*



**Gated World (Collective / Mistrusting)**  
If society moves towards the Gated World (Collective / Mistrusting), NFPs may need to increase their efforts to:

1. Devolve power, representation and decision-making towards the frontline community through capacity building and empowerment.
2. Identify and service specific niche communities through aggregation platforms and support structures.
3. Prove the impact of work at a community level.
4. Choreograph social movements that drive change.
5. Manage open-source brands.

*“ In this world, partnerships and relationship fundraising thrive as communities support communities.”*



**Unfenced World (Collective / Trusting)**  
If society moves towards the Unfenced World (Collective / Trusting), NFPs may need to increase their efforts to:

1. Differentiate themselves from businesses that are increasingly positioned as agents of good.
2. Include a wide variety of community voices in decision-making.
3. Collaborate across organisations and sectors and consolidate into larger entities.
4. Harness shared data for a bigger impact.
5. Maintain relevance and demonstrate the value NFPs add, which government, business and collective community action cannot.

# Implications for all worlds

Irrespective of the way society shifts, our research identified seven common organisational implications critical to successfully navigating future challenges:

## 1 Be ready - regularly practice scenario mapping

Our research illuminates how infrequently NFPs take the time to consider longer-term horizons and systemically explore possibilities. Undoubtedly, the future is deeply uncertain, and NFPs must play a significant role in civic society. **NFPs and the sector should regularly practice scenario mapping.**

## 3 Maintain Relevance - demonstrate unique contribution and value to society

In each world, NFPs will face increased competition for attention, data, voice, time and money. Whilst the source of competition varies, the **NFPs must demonstrate our unique contribution and value to society.**

## 2 Shape the narrative - take control of the narrative

NFPs are not mere observers of the emerging world but agents influencing how society evolves. As a sector, NFPs must protect fragile trust, demonstrate impact and strengthen relationships. We must be ready for changing expectations. **We must take control of the narrative and contribute to building the societies we desire.**

## 4 Listen and connect - deliver better supporter experiences

Throughout the Worlds, there is a unifying desire to be understood. NFPs have improved their insights and understanding of supporter motivations in recent years. NFPs **must deliver better supporter experiences** by seeking and acting on fast feedback, communicating in ways that resonate with different audiences and deepening connections.

## 6 Make the case for receiving generational wealth transfer - stronger Gifts In Wills programs and inheritance-giving mechanisms

The Productivity Commission estimates that compared to recent history, almost four times the amount of money will flow to nearly half the number of people over the next 25 years, creating a massive opportunity for NFPs. **NFPs must seize the opportunity with stronger Gifts in Wills programs and inheritance-giving mechanisms.**



## 5 Nurture talent- be clear on required skills, better position the rewards/opportunities of working in the sector

Recruitment strategies, employee expectations, and working methods differ in each world scenario. However, NFPs will always face stiff competition for the talent required to deliver their mission. To win the talent wars **NFPs need to be clear on the skills they require and better position the rewards and opportunities of working in the sector.**

## 7 Engage the next generation- deepen engagement with younger people

Our 2021 study showed that NFPs were not meeting the needs of those under the age of 35. The under-35 cohort will not only inherit one of our Four Worlds but will be instrumental in determining which emerges. NFPs cannot rely on the notion that, in the future, people will have the capacity and inclination to support them as they age. **We must prepare for the future today by deepening our engagement with younger people, giving them a voice and better meeting their needs.**



# The need

A key observation many people make is that good intentions and ideas are not enough to make a successful NFP. NFPs can be easily scuppered by shifting societal interests, beliefs and needs.

**Organisations can spend a great deal of time and energy being inwardly focused. This focus is understandable as many pressing issues compete for their attention, such as:**

- How do we allocate our limited supply of time, money, people and equipment when there are seemingly unlimited places to spend these precious resources?
- Do we work to solve short-term operational challenges, or do we spend more time looking at longer-term initiatives that we believe will be important for the organisation but have not borne fruit yet?
- Do we focus on building the organisation's efficiency by better managing each departmental team, or do we focus on building synergy across departmental teams?
- Do we centralise decision-making by bringing key operations under one head office, or do we give power to the periphery by decentralising decision-making and building local representation?

**Determining a way forward through these internal challenges can only come from a conscious exploration of the broader societal environment in which the organisation exists:**

- How can you know if centralisation or decentralisation will be better unless you know what your supporters and donors expect of your organisation?
- How can you know where best to allocate resources until you have explored what society is looking for you to address?
- An inward-looking organisation risks becoming brittle and breaking when confronted with a changing world and unpredictable events.

## The opportunity

An external focus and methodical exploration of their broader social environment are critical in helping NFPs build a robust and responsive organisation.

While we can not predict a specific future, we can build our awareness that we are not in complete control of the markets in which we operate and the signals that markets are changing. We can build robustness and responsiveness in our organisation.

Change is accelerating; disasters are more frequent; technological evolution is pervasive and societal attitudes are shifting rapidly. Whilst our three-year planning cycles still hold merit for the allocation of resources, we need to take a longer-term view to prepare for the possible.

## Why scenario mapping?

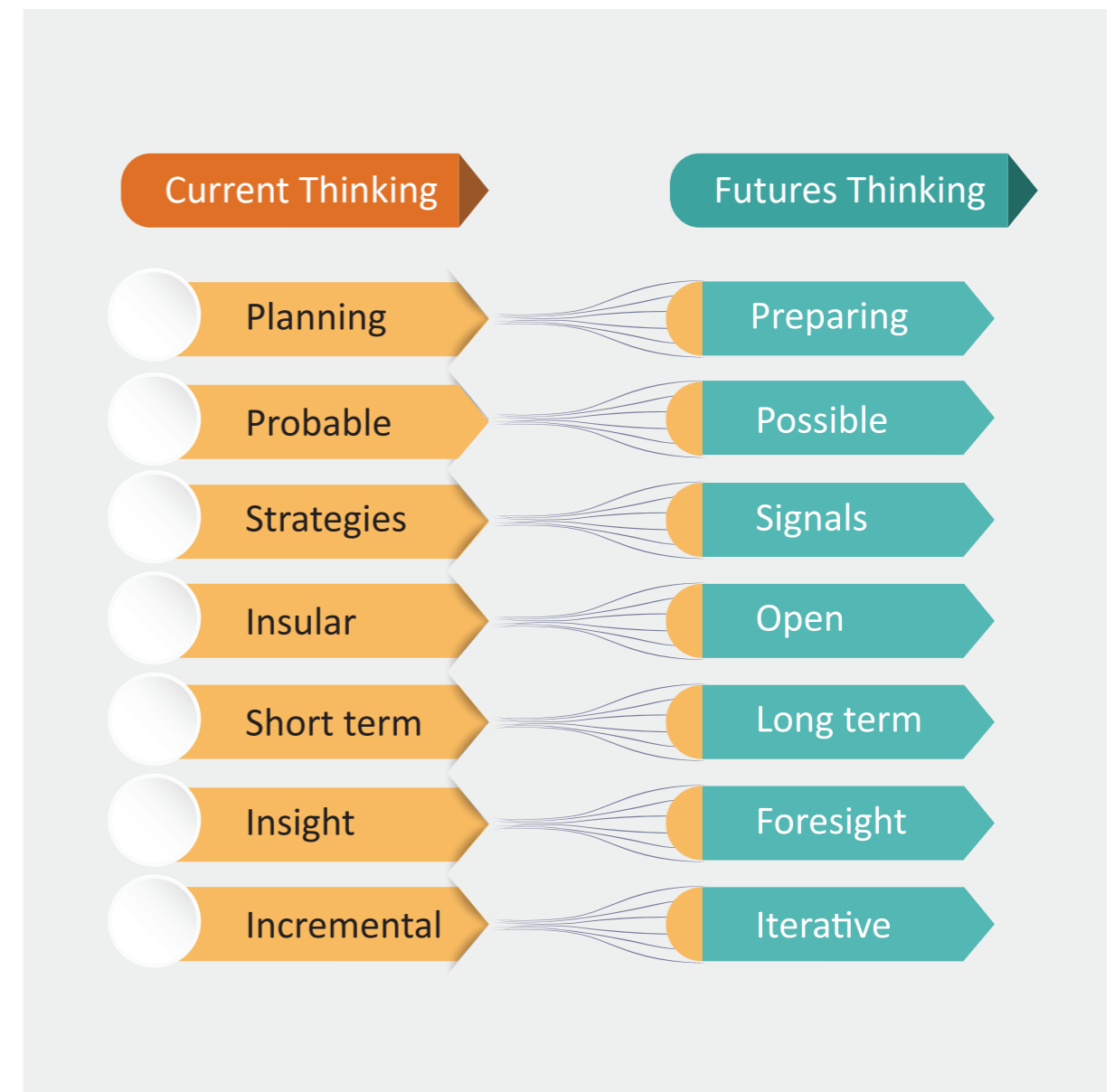
Scenario mapping helps not-for-profits navigate uncertainty, make strategic decisions, manage risks, optimise resources and foster innovation, all of which are crucial for sustainability and impact.

Scenario Mapping shifts the focus from planning for a *specific future* to preparing for *possible futures*. Specific plans are helpful in a stable world where conditions are relatively predictable. The real world also requires organisations to adapt and respond to shifting conditions. **Scenario Mapping encourages us to explore possibilities, read the signals and be ready to take advantage of the changing conditions.**

Whilst many businesses and institutions undertake scenario mapping to move outside the realms of planning for the probable and into preparing for the possible, **we have not found any focus on the implications for generosity or the not-for-profit sector.**

Scenario mapping explores different situations, interactions and options to understand complex systems and create organised representations of possible outcomes. It deliberately focuses on the ambiguous, the uncertain, the volatile and pervasive.

**As not-for-profits, individually and collectively, we need to shift our thinking from**



## Benefits of undertaking scenario mapping:

### 1. More Strategic

Scenario mapping helps shift leadership attention from internal process and operations towards longer-term vision and impact. It helps NFPs envision multiple future possibilities, aiding in developing a more flexible and forward-thinking strategic vision. It can help us remain bold and relevant in the face of uncertainty.

### 2. Improved Risk Management

Not-for-profits can better anticipate and prepare for potential risks and challenges by considering future scenarios. This proactive approach to risk management is vital for organisations that operate with limited resources and are expected to be prudent in their decision-making.

### 3. Adaptability

Scenario mapping equips not-for-profits to be more adaptable in the face of uncertainty and change. It helps organisations consider where their current approaches (policies, processes and procedures) need to change in a less predictable future. By having contingency plans for different scenarios, these organisations can adapt more quickly and effectively to unforeseen events or changes in their operating environment.

### 4. Enhanced Decision-Making

This planning process encourages thorough analysis and critical thinking, leading to more informed and strategic decision-making. Making well-informed decisions is vital for not-for-profits, where resources are limited and impact closely scrutinised.

### 5. Deeper Engagement

Scenario mapping engages teams by exploring challenges where there are no easy or right answers. It helps teams move away from the day to day and connect through the creation of a common language. It often involves diverse stakeholders, fostering collaboration and communication within the organisation and with external partners. This can lead to more cohesive and comprehensive strategies and enhance the organisation's ability to communicate its vision and plans effectively.

### 6. Innovation and Creativity

The process of imagining various futures can spark creativity and innovation within the organisation. This can lead to the development of unique solutions and approaches that set the organisation apart and enhance its effectiveness.

### 7. Shapes the Future

Understanding possible futures can help NFP's articulate the world they would like to see emerge and influence the narrative. This narrative can be used to shape peoples focus and attention. Words become actions, actions become habits, habits shape destiny.



**Whilst it's important to understand the context of changes already in play, scenario mapping is most valuable when dealing with the uncertain and ambiguous.**

For example, we know that in Australia and many other wealthy nations, there will be a significant intergenerational transfer of wealth from the older generation to the younger (noting that most inheritances will occur when people are in their late 50s to early 60s). That trend is predictable based on current demographics and wealth distribution.

**Scenario mapping may help us answer the bigger question: what will happen to that wealth?**

Will more older people include gifts to charities in their Wills? Will more people who inherit in their 60s make significant donations to their favoured causes? Or will the money leapfrog a generation to the 30-year-olds locked out of the housing market? We don't know...but we need to be prepared!

# Methodology

We adopted a step-by-step process for the development of the Four Worlds of Generosity model:

## 1. Mega Trend Distillation

We reviewed many publications and reports on the future, distilled the common themes and highlighted several “non-obvious” megatrends.

These megatrends were shared in advance with participants of our Futures Retreat.

*See Appendix A for an assessment of what will shape 2035*

*See Appendix B for the full list of Megatrends and Forces for Change.*

## 2. Identification of Axes of Uncertainty

The megatrends were used to stimulate discussions on the uncertain and polarising factors at play in unfolding social change, as well as their impact on how society may shift.

We applied a set of ten criteria to narrow the axes options to the most informative options and finally to a set of two pairs.

*See page 17 for the criteria.*

## 3. Applied Lenses

How the world may operate was viewed through a series of lenses to enrich the view of the world (e.g. technology, media, workforce). Generosity was applied as the final lens once we had built a big-picture view of society.

*See page 21 for the list of lenses applied.*

## 4. Diversification and validation

It was important to ensure we did not develop our thinking from an “NFP centric” mindset. Our initial Futures Retreat included: an astrophysicist; technology expert, engineer, public administrator, social researcher, safety expert as well as NFP leaders.

To ensure greater diversity of input to the draft model, we engaged the following audiences in further development:

- Fundraisers from UNHCR and The Smith Family
- Innovation students from University Technology Sydney
- Political activists from the Young Liberals NSW
- Fundraising and marketing experts from More Strategic

*See Appendix D, acknowledgements for list of participants.*

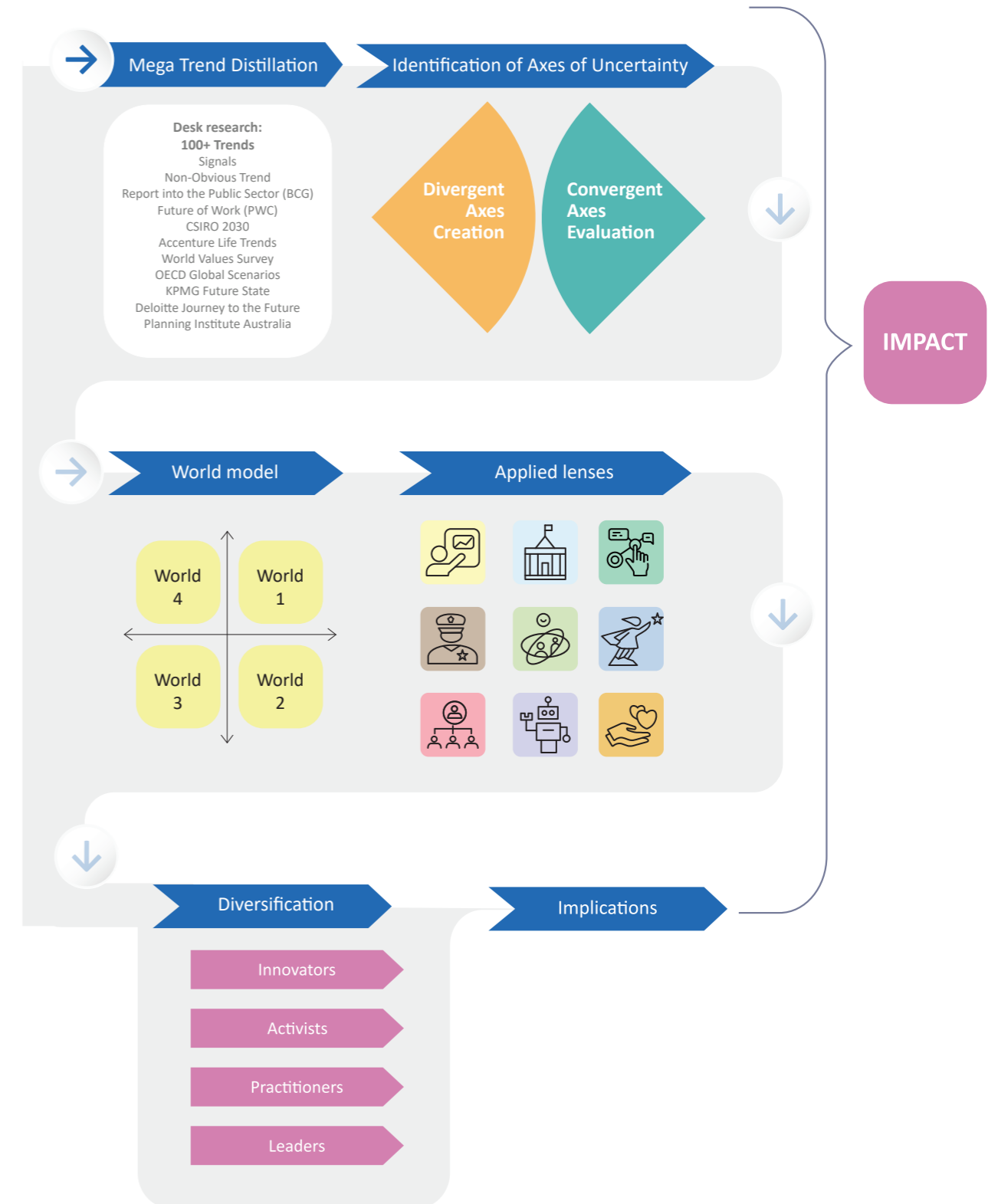
## 5. Public Perceptions

In November 2023 we took the public pulse on where they think Australia is, and where its headed. A representative survey for 1,000 people completed an online survey on their levels of trust, community orientation and other factors that might shape their world view.

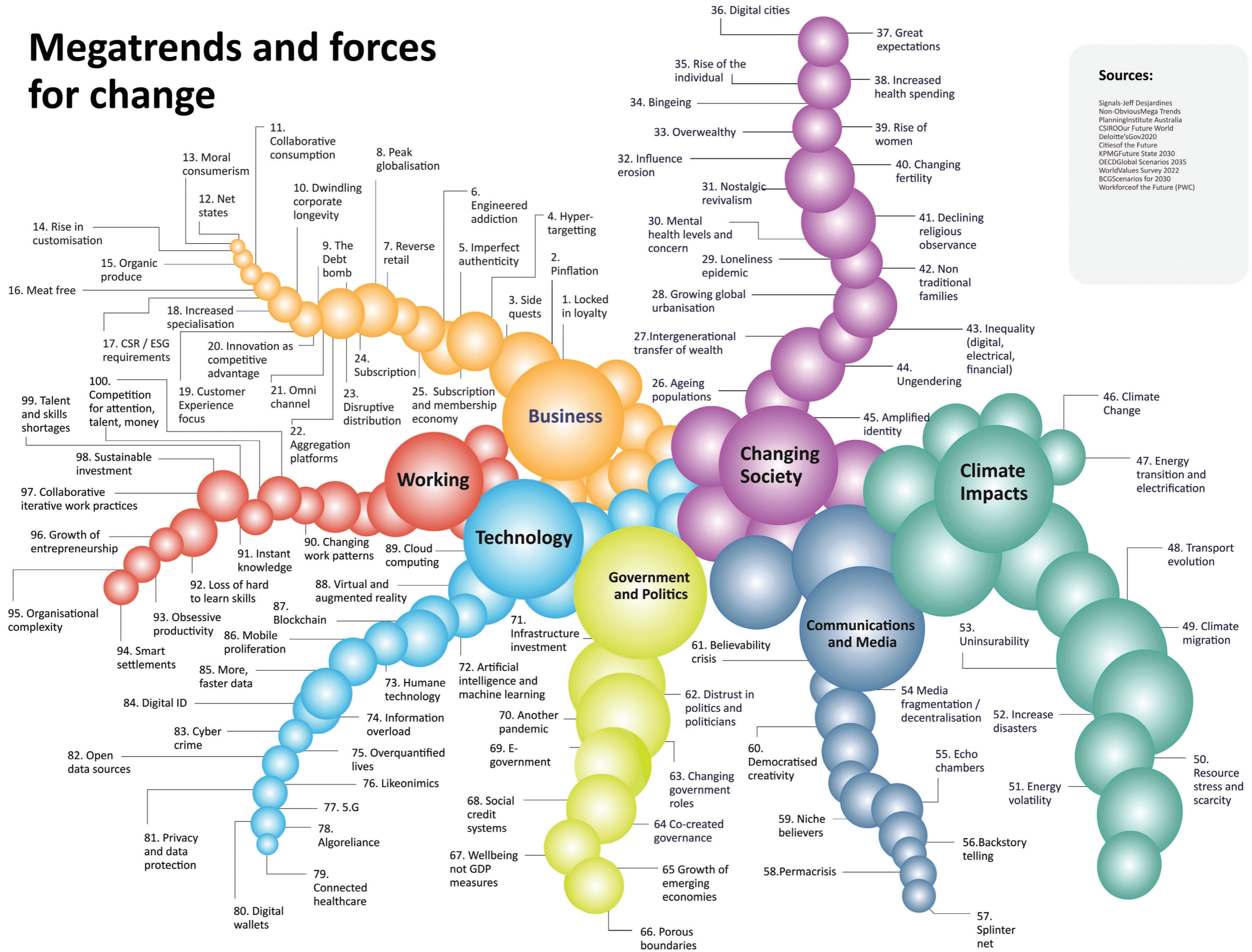
*See Appendix C for a snapshot of results.*

## 6. Implications

Taking all the information across the different Worlds, we identified common themes and unique challenges for not-for-profits.



# Megatrends and forces for change



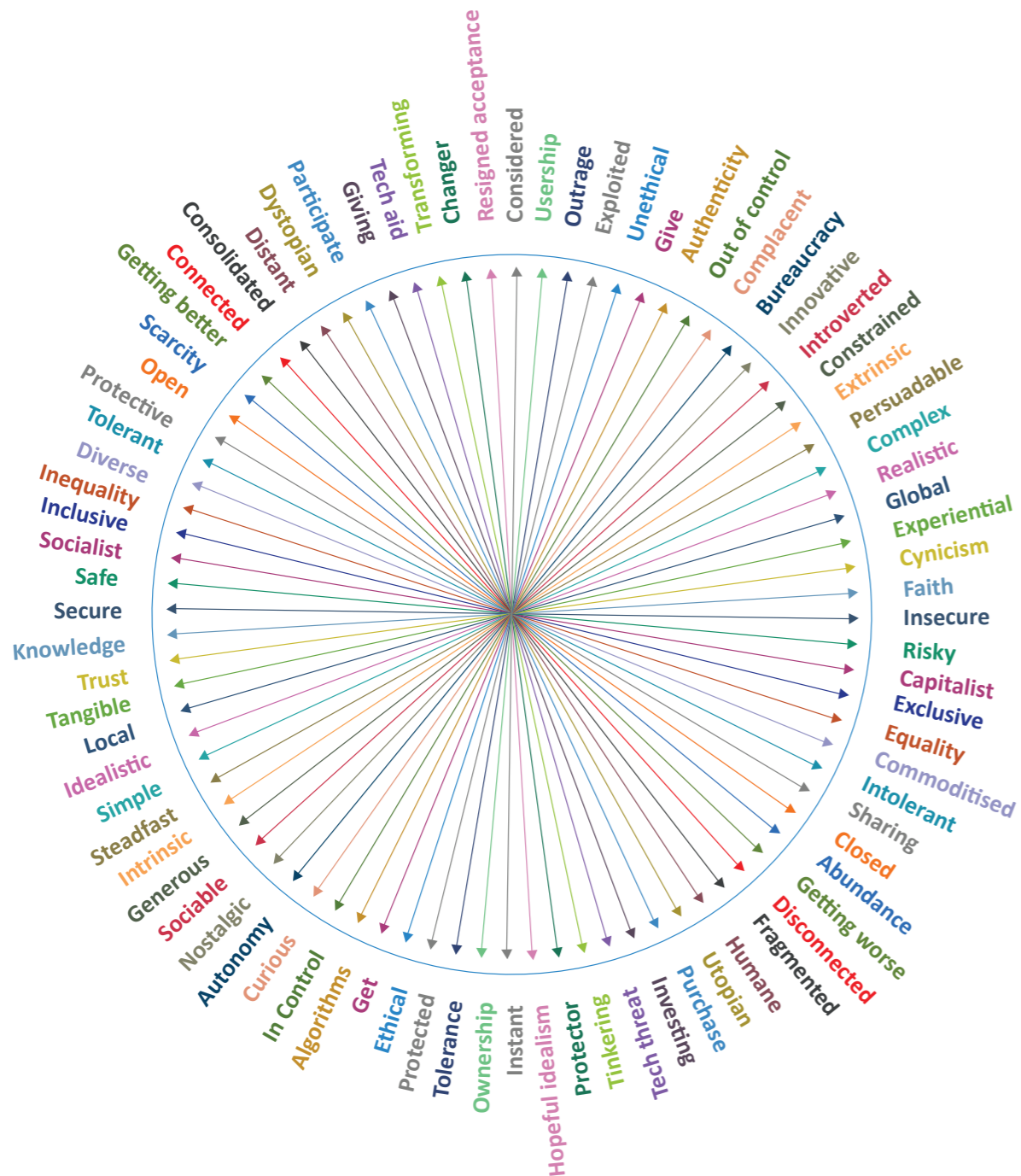
**Sources:**

Signals-Jeff Desjardines  
 Non-ObviousMega Trends  
 PlanningInstitute Australia  
 CSIROOur Future World  
 Deloitte'sGov2020  
 Cities of the Future  
 KPMGFuture State 2030  
 OECDGlobal Scenarios 2035  
 WorldValues Survey 2022  
 BCGScenarios for 2030  
 Workforceof the Future (PWC)

# Axes of uncertainty

The Axes of Uncertainty are those trends where the trajectory or implications are unclear, polarised and significant. They form the basis of the key question in scenario mapping “what if...”

Nearly one hundred possible axes were identified through the pre-reading and generated at the Futures Retreat. The first stage of axes development was deliberately divergent, focusing on generating as many options as possible. A list of combinations considered is shown below.

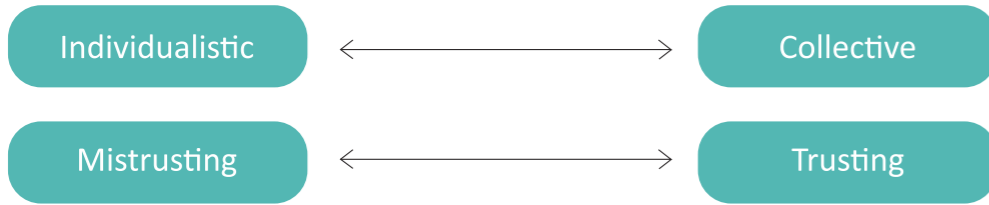


To narrow the selection down, we used the following ten criteria :

	Factor	Descriptor
1	Apolitical	Whilst there may be political repercussions, the axes themselves should not be based on a political philosophy or leaning.
2	5–10-year horizon	To be valuable, we need to work on the 3rd horizon, beyond our current planning cycles.
3	Unclear / ambiguity	To ensure we explore the possible rather than the probable, we want to consider those axes that have greatest volatility and ambiguity.
4	Impacts Australia	There are many global megatrends, and we are interested in all that could impact Australian Generosity.
5	Easy to grasp	The axes must be simple to explain, make sense to people not involved in the process and be logically different.
6	Bipolar	There must be extremes that clearly separate the possible shifts. We start from the perspective we are in the middle and movement in either direction is equally likely
7	Measurable	There should be mechanisms for measuring where we are on the axes and how we are moving.
8	Impacts Generosity	There must be a strong link to the amount, type and direction of generosity as the shifts occur.
9	Universality	The axes should be applicable to a wide range of contexts and audiences, including different demographics.
10	Significant and driving	The axes must capture large and high impact shifts, not nuances and tweaks. They should be root cause drivers not the outcomes of other shifts.

## Selected axes

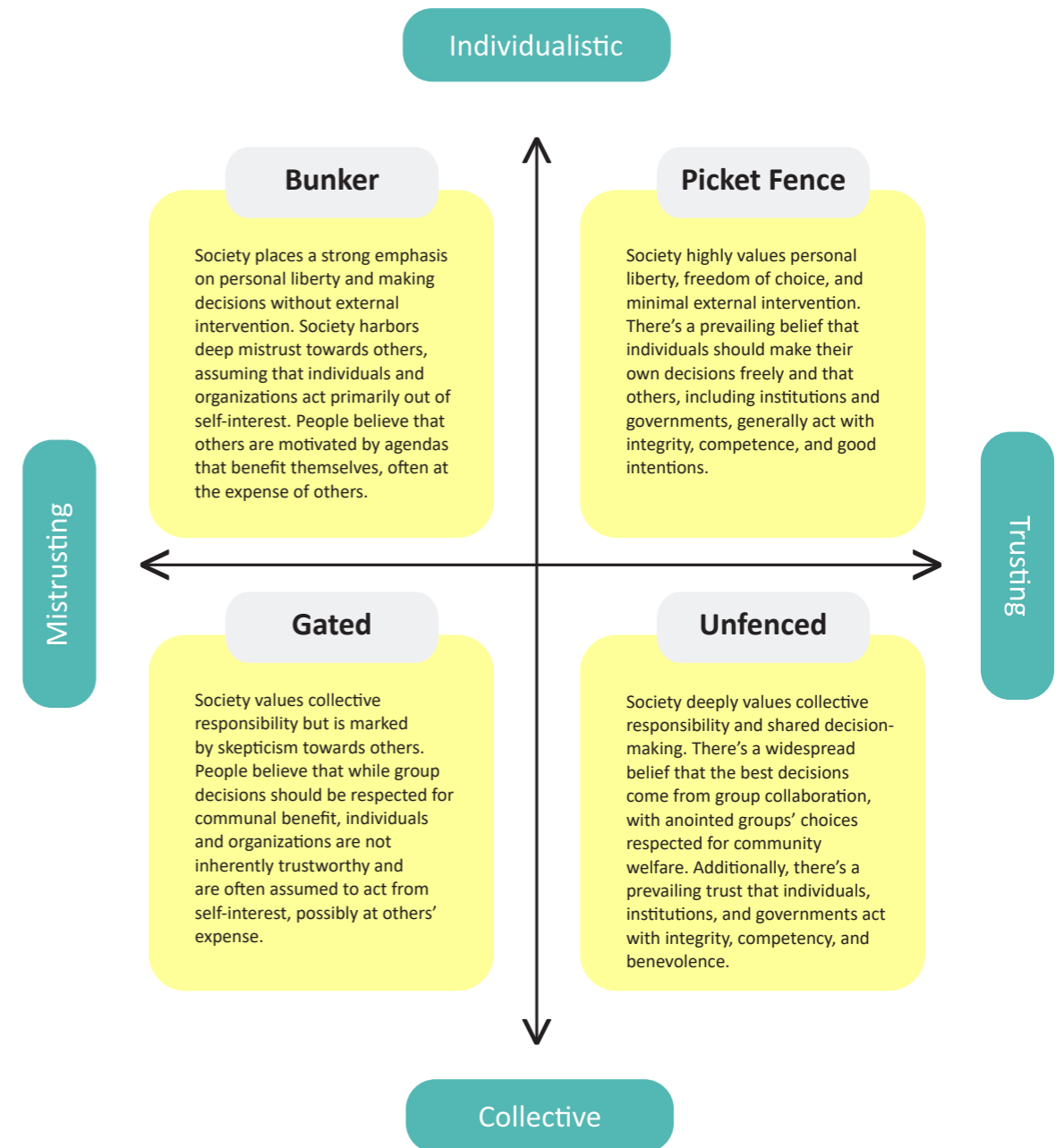
Following extensive discussion, we settled on two Axes of Uncertainty:



Individualistic		People place a high value on personal liberty, freedom of choice and minimal intervention from external sources. A movement toward this end of the axis suggests that more people in society believe that individuals should essentially be free to make their own decisions without intervention from experts, organisations or governments.
Collective		People have a sense of collective and shared responsibility. A movement toward this end of the axis suggests that more people in society believe that decisions are best made by the coming together of a group and that decisions made by an anointed group should be respected for the good of all in the community.
Trusting		A movement toward this end of the axis suggests that more people believe others (individuals, institutions, businesses, government and technology) operate with the best intentions and will do what they say. They will demonstrate competency, integrity and varying degrees of benevolence.
Mistrusting		A movement toward this end of the axis suggests that more people believe other individuals and organisations are not worthy of trust until they prove otherwise. They assume that others are working from a position of self-interest. People believe others are pursuing an agenda that will result in others' gain and their loss.

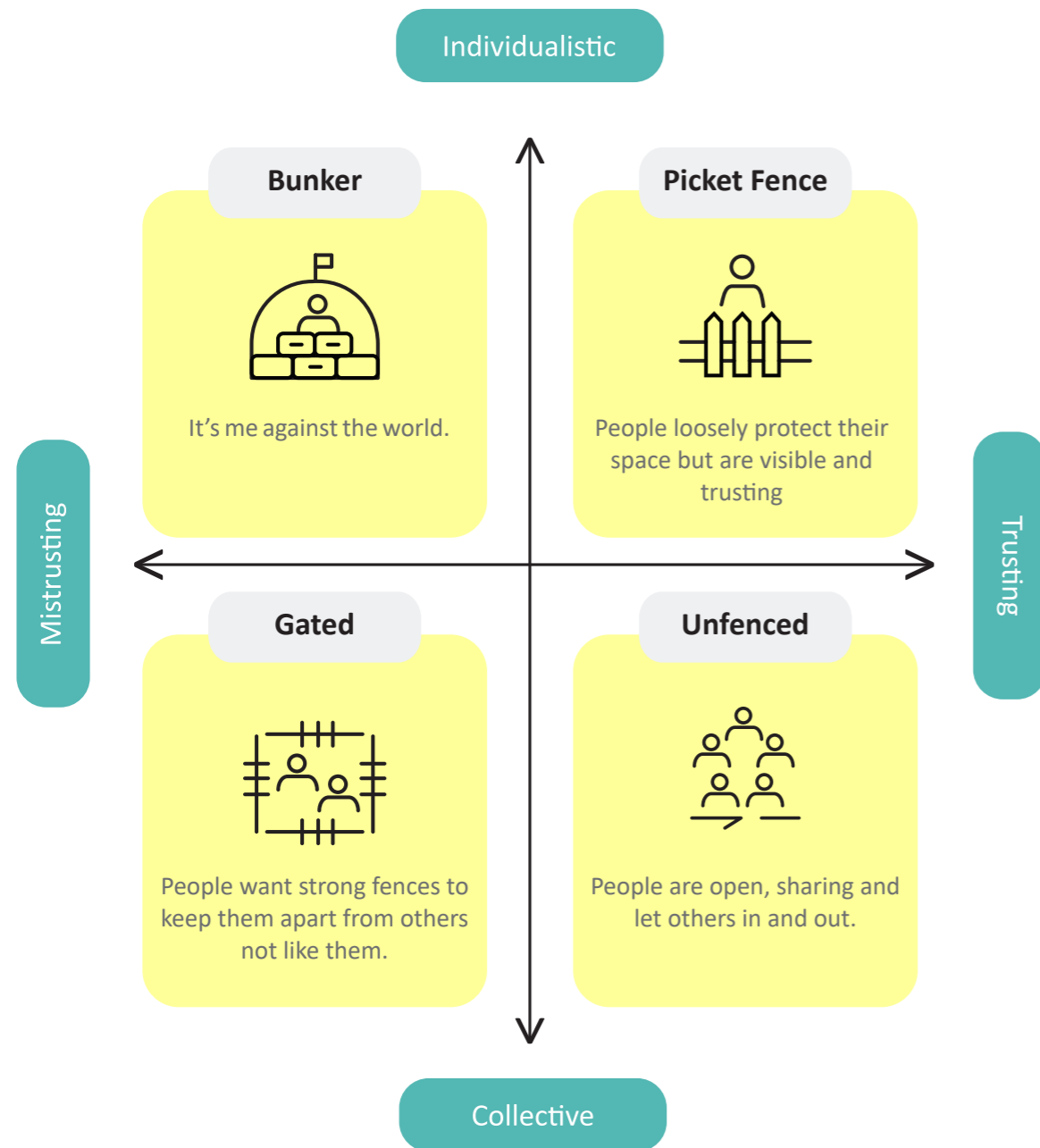
## The four worlds

Combining these two selected axes results in our Four Worlds Model

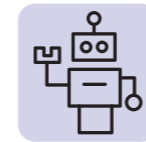


Through our research and interactive workshops, we have developed the following metaphors to help us better articulate the meaning behind each of the Four Worlds:

## The fencing metaphor



## The lenses



### Technology and data

How is AI, technology and data management practices impacting people's lives?



### Politics and Government

How do people make political decisions and what do they expect from elected officials and institutions?



### Education and Training

What do people seek from education and professional development?



### Media and Communications

What and how are people consuming messages, what is entertaining?



### Laws and enforcement

What laws and protections do people demand or resist?



### Business and workforce

How are people organised to work and what skills are in demand?



### Societal attitudes and values

What does the world cherish and admire? How does this impact behaviour?



### Heroes and scandals

What shakes the foundations of the world or stirs unrest? Who is revered?



### Generosity

How do people express and direct their generosity?

## World 1:



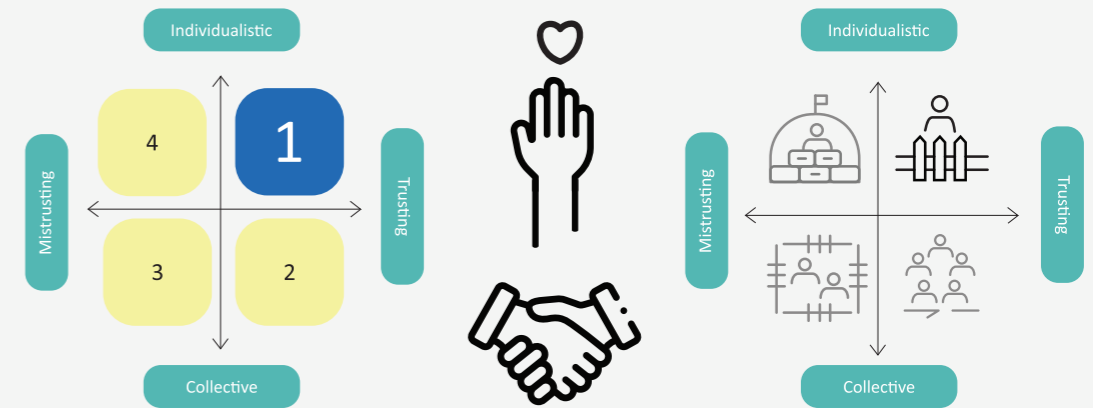
In 2035 Sydney, Sam and Ash navigate **The Picket Fence World**; a society celebrating individualism and trust. Sam, a renowned influencer, films a motivational video in their vibrant suburban neighborhood, advocating personal liberty and trust in societal good intentions. Ash wears a celebrity-endorsed T-shirt, embodying the culture of personal branding and hero worship.

School for Ash is about fostering individual talents, with a curriculum focusing on personal interests and tech innovation for self-advancement. Sam attends a networking event, exchanging ideas on personal brand leverage, emphasising a society valuing early adoption and personal achievement.

Their evening conversation revolves around personal successes and technological potentials.

## Individual and trusting: Picket Fences

In The Picket Fence World, life is a canvas for self-expression and trust in benevolence, celebrating personal liberty and celebrity influence.



**The Picket Fence world is characterised by the rights and capacity of the individual supported by a belief that others will do the right thing by them.**

In this world, individuals highly prioritise their personal freedom, the ability to make their own choices, and a life with minimal interference from outside entities. There's a prevalent belief in the inherent trustworthiness of others, with a general assumption that individuals and organisations act with good intentions. This society nurtures the conviction that individuals can live autonomously, confident in making their own life choices with little bureaucratic involvement or external meddling.

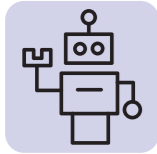
This is the world of celebrity worship, influencers and personal status. People act to further their own interests, follow the latest guru and seek endorsements from heroic leaders. Self-expression and personal brand-building prevail. Privatisation

is widely supported as a way of getting 'what you pay for' and ensuring government doesn't overreach. Technology is harnessed for personal gain, and digital divides widen. People want to control their destiny and expect the system to uphold their right to do so.

Individual experts or the loudest voices are most heard, and political parties become vehicles for charismatic leaders. Innovation in business is driven by individuality and the unique needs of ever-smaller segments of like-minded people. Early adoption of new ideas accelerates as people seek social credibility from the latest technology.

**Not-for-profits with strong, visible, engaging leaders that meet societal needs for recognition and attainment thrive.**

**Generosity is narrowed to seeking self-advancement or benefits to the people closest to the supporter.**



Technology is an enabler of personal success; people share data for personal gain and exchange it for the right price. Larger platforms are trusted as long as they continue to meet the individual needs of users. Tech can strengthen personal relationships. Lonely individuals find solace in AI avatars.



People elect charismatic individuals rather than parties. They vote with a high degree of self-interest for tax benefits and protectionist policies. Independents may fracture traditional party politics as long as they meet voters personal needs. At the extreme we elect benevolent dictators.



Individuals prioritize self-improvement via reputable organizations for advancement. Alternatives to government education gain favor for the competitive edge and networking opportunities. The gap in resources and pay between private and public schools widens.



Mainstream TV and online stars on respected channels dominate communications. Their endorsements are highly influential and their followers loyal as long as they continue to align with their expectations.



People want less laws and more freedoms to make their own decisions. People expect the legal system and enforcement to uphold their individual rights above those of the group.



Large companies employ AI for mass personalization and customization. Remote work, essential for attracting employees, allows for autonomy. Humanistic management, personal KPIs, and rewards are standard. There's a rise in privatisation. Consumers overlook "washing" if aligned with beliefs, actively shaping their eco footprint.



Endorsements, recommendation, word of mouth, status, external identity, personal achievement and success, self-expression, hierarchical, influencers, order, reputation, endeavour, striving.



Heroes: Successful (in the way I aspire to), influential, charismatic individuals who think like me.  
Scandals: organised exploitation of vulnerable people by those I thought I could trust: They may be contained rather than pervasive as not seen as a systemic failure.



Generosity aligns with personal gain, status, and rewards. Admiration grows for impactful founders, regardless of their organization's structure—business, social enterprise, or NFP. Leadership inspires followings. Visible giving boosts status; support becomes more selective, favouring similar individuals. Givers are more motivated by insurance and protection.

### Potential signals this world is emerging

- Increasing rates of privatisation of health, care and education
- Abandonment of party for personal politics
- Greater personalisation and mass customisation
- Demands for greater incentives and rewards for doing good
- Stronger sentiment for localised, in-group giving

### Implications for NFP's

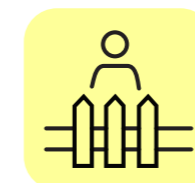
Deliver personal value	In a "what's in it for me/mine" society, develop subscription-type giving with explicit personal benefits.
Make giving visible	Leverage the increased desire for social status with more recognition, visible acknowledgments, publicity for higher value givers.
Personalise	In a world where the individual matters, people will expect tailored communications that show 'I am special'.
Identifiable beneficiaries	Story-based case studies of individuals striving for personal development will resonate with World 1 societal values.
Protective giving	Help people get their primary "Job to be Done" through giving of insurance and protection to help closest connections thrive.
Proximate generosity	Position and target beneficiaries who are close and aligned to the prospective donor.
Charismatic leaders	Give voice to leaders who align with different audiences and build strong personal (rather than brand) following.
Giving benefits	Ensure governments support societal demands for personal rewards and tax benefits from giving. Reimagine membership and rewards from giving.
Self-development	Assist people with personal growth through volunteering, training and immersion in your work.
Get direct	Help people to give directly to other individuals (Kiva / Go Fund Me style activities and more pseudo connections like child sponsorship) and build status through peer-to-peer type giving.
Add value	With increased competition from business and direct giving NFPs must clearly demonstrate the benefits of giving through them.
Promote striving	Illustrate how generosity helps people help themselves.
Individual outcomes	Demonstrate to government and the community the benefits of contributions to individuals.

## The challenges for the Picket Fence World:

- **Hyper-Competitive Fundraising:** NFPs might engage in aggressive competition for celebrity endorsements and influencer partnerships, leading to an unsustainable 'arms race' that prioritises popularity over purpose and dilutes the focus on genuine social impact.
- **Exacerbation of Inequality:** With a focus on self-advancement and personal gain, philanthropy could become a tool for social status, further widening the gap between the haves and have-nots. NFPs may find themselves catering only to affluent demographics, neglecting underprivileged communities.
- **Erosion of Trust in NFPs:** As personal gain becomes the primary driver of generosity, trust in NFPs could diminish. The public may perceive these organisations as platforms for individual aggrandisement rather than genuine agents of social change, undermining their credibility and mission.

## The opportunities for the Picket Fence World:

- **Innovation in Fundraising and Engagement:** The focus on individualism could spur innovative, personalised approaches to donor engagement and fundraising, leveraging cutting-edge technologies to create highly engaging and interactive donor experiences.
- **Increased Visibility and Influence:** The reliance on high-profile figures could significantly boost the visibility of NFPs and their causes, attracting new audiences and increasing public awareness about important social issues.
- **Rise of Social Entrepreneurship:** This environment could foster a new wave of social entrepreneurship, where charismatic leaders establish cause-driven businesses or hybrid organisations that effectively blend profit motives with social impact, appealing to a society that admires individual success and initiative.



## Experiments NFPs may need to conduct in the Picket Fence World

- Scale up celebrity endorsements and influencer campaigns
- Scale down focus on the organisation brand.
- Target of more affluent demographics.
- Scale up your ability to see what campaigns and approaches are working.
- Explore how to partner with emerging entrepreneurial organisations to achieve visibility and impact.

## World 2:



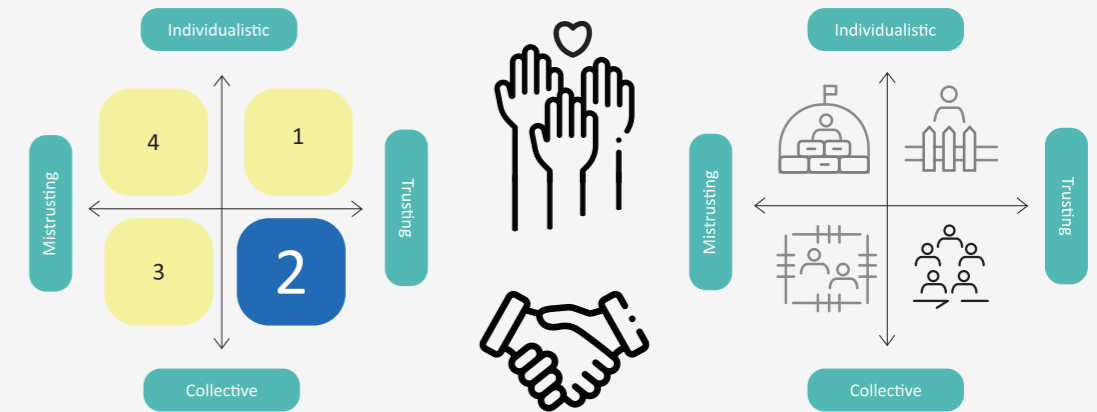
In **The Unfenced World** of Sydney, 2035, Sam and Ash live in a society where collective responsibility and institutional trust shape life. Their day begins with a community meeting, where Sam leads discussions on neighbourhood projects, emphasising collective action and shared responsibilities.

Ash's school projects focus on societal improvement and environmental sustainability, reflecting a shift from human-centered to planet-centred thinking. Sam works at a community-focused not-for-profit, where generosity is about contributing to societal welfare.

Technology in this world fosters community connectivity and empathy, with Sam and Ash engaging in virtual forums for global understanding.

## Collective and trusting: Unfenced

The Unfenced World is a tapestry of shared responsibilities and mutual trust, woven together by acting for the greater good, despite occasional personal sacrifices.



In **The Unfenced World** has a high degree of interdependence and shared responsibilities supported by institutions acting in the best interests of the wider community.

In this world, there is a strong emphasis on communal responsibilities and shared duties. The typical approach to problem-solving involves uniting as a collective to find a consensus-based solution. Trust in others is a fundamental aspect of this society, where there's a prevailing belief that both individuals and organisations act with noble intentions. This mindset encourages collaborative efforts and collective decision-making, underpinned by a deep-seated trust in the community.

This is the world of collaboration, shared concerns and looking out for others. Consensus, conformity, tolerance and consultation are celebrated. People expect organisations to swap self-interest for community concern. Technology and creativity evolve from "human centred" to "planet centred" design. Technology enables greater connectivity, understanding and tolerance with empathetic perspective and facilitating real world interactions. People find joy in helping others. People willingly make sacrifices for shared benefit, support investments in welfare and environmental protection, and embrace higher taxes for social gains.

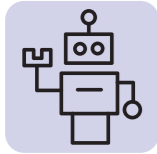
Personal freedoms may be sacrificed for the collective good, which causes tensions, and the "court of public opinion" becomes the dominant determinant of what is "right" and acceptable. Standing out is frowned upon, and tall poppies are cut down.

There is an increase in rules, conventions and bureaucracy as experts and institutions decide how people should live and operate in this society. As conformity increases, we reduce our ability to adapt and respond as the decision-making process is slowed.

Innovation is driven by freely shared data and a spirit of collaboration to meet community needs. Transdisciplinary diffusion accelerates advances in health and community care. However, a degree of comfort and complacency may slow growth.

Large, established NFPs thrive as the desire to lift up those in need is widespread, and people feel comfortable supporting the trusted entities. Competition for talent is based on purpose and culture. Organisations shift from "People and Culture" to "Purpose and Society". Employees evaluate published wellbeing reports to choose employers.

**NFPs may face a threat of relevancy if government and business increasingly meet the expectations of community to act in their best interests.**



Technology reduces inequality and loneliness, with data shared for societal benefit, minimizing privacy law demands. Trust in large platforms exists, though vulnerability concerns arise. Community scam monitoring and collaborative lawmaking aim to mitigate risks.



Party politics thrives as people retain faith in the system and collective decision making of parties. Traditional parties will need to demonstrate inclusivity, social and collective benefit. Demands for environmental and social equity. We may move towards a more socialist leadership.



People see education as a right and demand free, universal, quality education from kindy to tertiary level. They expect employers to support their professional development. Public schools are well funded, teachers admired and suitably rewarded.



Big national mainstream media sets the agenda and calls the shots. This may suppress dissent and create conformity of opinions as people don't want to stand out.



Legal systems put collective benefit above individual rights and people accept this for the common good. There is a rejection of surveillance and punitive punishments as people have faith in others. People trust the intentions of the lawmakers.



Collaborative work energizes, with autonomy and agility standard. Shared goals unify teams. Businesses influence and adhere to social norms, pushing beyond obligations for ethical impacts. The sharing economy grows; flatter hierarchies delegate authority extensively. Brandstanding occurs with less "washing" criticism, yet collective decisions introduce bureaucracy, hindering productivity.



Unity, conformity, obligation and duty. Social norms shape behaviours. Fairness, teamwork and tolerance. Diversity, authenticity and universalism. Engagement, involvement and co-creation. Equality. Global. Inclusive. Compassionate and empathetic. Individuality is frowned upon.



Heroes: diverse teams putting the collective first and serving the community: Matilda's, MSF Scandals: Rebels and self-promoters serving their own interests: Andrew Tate. A collective mindset may mean scandals are contagious and seen as systems failures not isolated instances. People will expect government to fix them.



Generosity thrives; NFPs increasingly merge and collaborate. Giving is untied, with open data sharing. Large organizations prosper from trust and scale. Social fundraising favors established, efficient entities. A broad spectrum of causes attracts support, democratizing and socializing giving across diverse issues.

### Potential signals this world is emerging

- Preference for shared rather than individual experiences (e.g. cinema attendance v streaming)
- Increased membership in community organisations
- Growth of social enterprises
- Increased funding for public services
- Reduction in the number of NFPs through mutually beneficial mergers

### Implications for NFP's

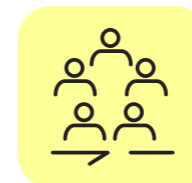
Differentiation	NFPs must be clear on what sets them apart from other entities also "doing good" to retain relevance as businesses and government increasingly operate in this space to meet community expectations. At the extreme, NFP's become irrelevant as businesses meet supporters' emotional needs and government meets community needs.
Diversity	People will expect wider representation within NFPs and more options for becoming involved.
Leverage	With copious amounts of freely given data and a trusting environment, NFPs must adapt to harness the power of data to match community needs and expectations.
Collective giving	Develop more social giving and social fundraising that connect groups and causes. Capitalise on the increased demand for business to contribute to society. Use shared contributions through matched support.
Include	Help people to join the movement rather than fund the activity; harness skills and ideas from the community for the greater good.
Collaborate	Seek more opportunities to work together within the NFP sector, especially leveraging shared data, and form better partnerships with business (before they decide NFPs are not required).
Protect	NFPs in World 2 are in a privileged but fragile position; retaining public confidence and demonstrating the unique role NFPs play will be critical.
Consolidate	People may have confidence in larger "one stop shop" organisations that meet a wide range of community needs, seemingly more efficiently.

## The challenges for the Unfenced World

- **Suppression of Innovation:** The emphasis on consensus and conformity might stifle innovative thinking, leading to a lack of creativity in problem-solving within NFPs.
- **Bureaucratic Inefficiencies:** An increase in collective decision-making processes could result in slow, cumbersome bureaucracy, hindering the agility and responsiveness of NFPs.
- **Risk of Groupthink:** The strong emphasis on consensus may lead to groupthink, where dissenting opinions are suppressed, potentially leading to poor decision-making and overlooked societal needs.

## The opportunities for the Unfenced World

- **Enhanced Community Trust and Support:** The alignment with communal values could lead to increased trust and support from the community, strengthening the NFPs' impact and reach.
- **Greater Resource Sharing and Collaboration:** The spirit of collaboration could lead to more effective resource sharing and joint initiatives, enhancing the efficiency and impact of NFPs.
- **Widespread Social Engagement:** The focus on communal responsibility may lead to higher levels of volunteerism and community engagement, providing a rich pool of resources and support for NFP initiatives.



## Experiments NFPs may need to conduct in the Unfenced World

- Invite people who have nothing to do with the organisation to contribute to thinking and decisions to increase diversity.
- Create small interest groups within the organisation where playfulness and experimentation is encouraged.
- Work to reduce bureaucracy by encouraging cutting red tape.
- Help people focus on the organisations purpose. Re-structure to focus on core business.
- Scale up volunteer and community engagement programs.

## World 3:



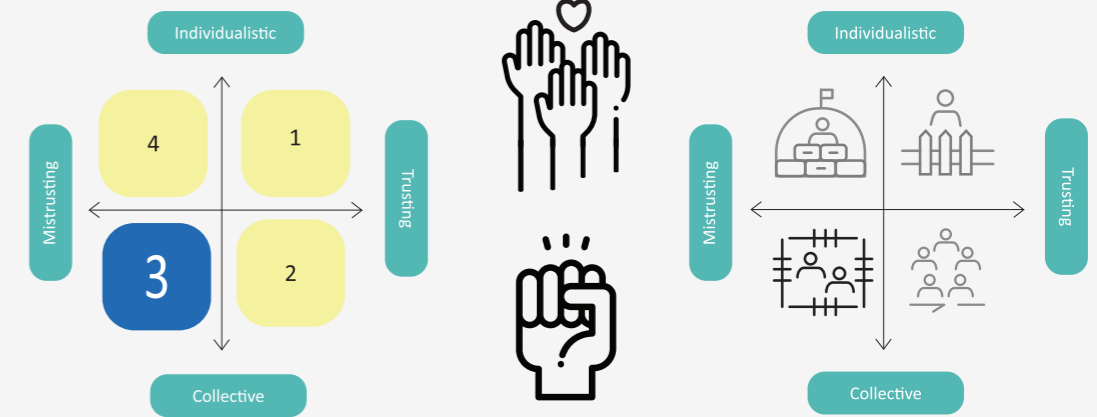
In 2035's **Gated World** in Sydney, Sam and Ash lead lives of community loyalty and scepticism towards larger institutions. Their mornings involve community meetings focused on protecting their specific interests, with a deep emphasis on local solutions and self-reliance.

Ash's education is community-centric, fostering a sense of belonging and responsibility. Sam works in a small, community-driven not-for-profit, reflecting the fragmented nature of their society. Generosity is intensely local, with contributions directed at immediate surroundings.

Technology reinforces community bonds and local networks. However, Sam and Ash sometimes feel constrained by their insular world, yearning for broader perspectives.

## Collective and mistrusting: Gated

Life in the Gated World is about finding strength within one's tribe, a sanctuary built on mutual suspicion and fierce commitment to local interests.



The Gated world is sceptical about the intentions and abilities of organisations and institutions to meet the needs of their defined community. They act to identify, develop and protect the specific needs of whichever communities they identify with.

In this world, the community greatly values shared obligations and collective responsibilities. When facing challenges, the common response is to unite as a group to reach a consensus on the path ahead. However, there's an underlying scepticism about the motives of others; individuals and organisations are often viewed as self-interested. Trust is not given freely but must be earned through demonstrable actions that align with the community's interests.

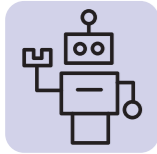
This is the world of cliques, cults, communes, gated communities, tribes and rebellious movements. People look out for their community more than the interests of others. In this world you are either with us or against us. Frustrated by the "failure of the system", people take responsibility for driving the changes they want in their area of concern. It's the land of NIMBY's, unions, protests and Extinction Rebellion. Class actions and legal challenges are used by organised groups to fight for their collective rights.

People come together with shared interests through community cooperatives, localised sharing economies and small businesses. Local and community social pages and news coverage keep people informed about their narrow area of concern. Neighbourhood watch, localised surveillance and private security services help protect the community from the "out-groups".

Businesses and services become fragmented and localised with more delegated decision-making. People engage more with local than national government. Organisations respond with empowered local decision-making and consultation.

Innovation is driven by small, nimble organisations drawn from the community of interest who have a deep understanding and commitment to finding solutions to their unique community needs.

**NFPs become increasingly fragmented, specialised and localised with greater community ownership and involvement.** The bigger organisations must yield to local decision-making and let go of control; trading expertise for empowerment. NFPs will fight for relevance if seen to be out of touch with local community needs.



Technology diversifies into niche platforms for varied interests, with selective sharing and encryption favored. Debates over data and AI laws are intense yet fragmented, hindered by trust deficits, making consensus difficult in a landscape of exclusive data practices.



People mobilize and unionize for in-group benefits, polarizing politics around parties and groups. Disruption from activists slows national projects, as marginalized groups rise. NIMBYs gain influence, leading to a fractured federation and lawmaking dominated by interest group trade-offs.



Community, Montessori, faith-based, and locally funded schools thrive amongst niche communities. Digital online education communities grow. Governments increasingly outsource education to interest groups resulting in curriculum fragmentation. Employers co-fund their own colleges and sector-based initiatives.



Fragmented micro channels for each special interest community create ever more echo chambers. There is no common view and only shared truths.



Let down by the failure of the system to look after their collective interests, people engage private security or form their own community mini police forces. People demand anti-trespassing laws and disrupt government surveillance of their people.



Business is fragmented with contracted group services, niche communities of interest supplied by crowdfunded or local organisations. Regulations and accountability are imposed (due to low trust) and opposed by staff (uphold group rights).



Niche. In-groups. Protective. Local. Insular. Intimate. Selective. Righteous. Co-ops. Justice. Empowerment. Coordination. Evidence. Exclusive. Siloed. Group autonomy.



Heroes: disruptors who mobilise communities to challenge the system: early Bob Brown, Donald Trump and Greta Thunberg.  
Scandals: when “they” take away “our” joy and rights. Bulldozing the local park, it affirms “I was right – they are all out to get us”.



Generosity becomes constrained, focusing on specific communities. People engage deeply within niche interests, impacting their in-group. Distrust fuels demands for localized impact reporting. Philanthropists and communities respond by establishing their own schools and hospitals, tailoring solutions to local needs.

### Potential signals this world is emerging

- Increased membership of unions, single-issue pressure groups and narrow community-specific organisations with increased influence on decisions by motivated minorities
- More legal challenges to protect local areas and shared interests
- Growth of local ethical businesses (craft breweries and farmers markets)
- Re-opening of local branches
- Expansion of community pages and local newspapers

### Implications for NFP's

Empower	To thrive in World 3, NFPs will need to listen and empower communities to solve their own problems (however they define them).
Localise	Reimagine branches and auxiliaries as the people who ensure relevance, effective engagement and build connections. Battles will be fought over the diverse needs of each community and who is best placed to identify and meet them.
Organise	The difference between a social network and a social movement is choreography. NFPs will play a vital role in enabling, supporting and funding communities of interest.
Reassure	With lower trust, groups will demand proof that NFPs meet their needs. This means shifting the narrative from the costs of doing good to the benefits realised by the specific community.
Community Fundraising	NFPs will become the agents of more sophisticated localised community-based fundraising that embraces all channels and activities enabled by democratised technology.
Crowdfunding for the Crowd	NFPs will need to harness the desire and ability of groups to be autonomous and self-funded.
Devolve	Centralised decision-making will be rejected in World 3 unless community involvement is transparent and genuine.

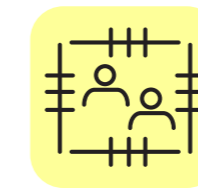
## The challenges for the Gated World

- **Increased Fragmentation and Isolation:** The focus on local interests could lead to fragmentation within the NFP sector, reducing collaboration and increasing isolation between different groups.
- **Limited Scope of Impact:** The intense focus on specific communities might limit the overall reach and impact of NFPs, potentially neglecting broader societal issues.
- **Resource Inefficiency:** The need to cater to a multitude of niche communities could lead to inefficient allocation of resources, as NFPs spread themselves thin trying to meet highly specific demands.



## The opportunities for the Unfenced World

- **Enhanced Community Engagement:** Deep community involvement could lead to increased engagement and support, strengthening the bond between NFPs and their local constituencies.
- **Greater Relevance and Responsiveness:** Tailored programs that address specific local needs can significantly enhance the relevance and effectiveness of NFPs within communities.
- **Empowerment of Marginalised Groups:** The focus on local empowerment may lead to significant advancements for marginalised or underrepresented groups, ensuring their voices are heard and their needs are met.



## Experiments NFPs may need to conduct in the Gated World

- Be more explicit with the link between your organisations cause and the effect on the specific target community.
- Narrow the focus of campaigns to a specific community.
- Work to build relationships with key influencers in specific communities.

## World 4:



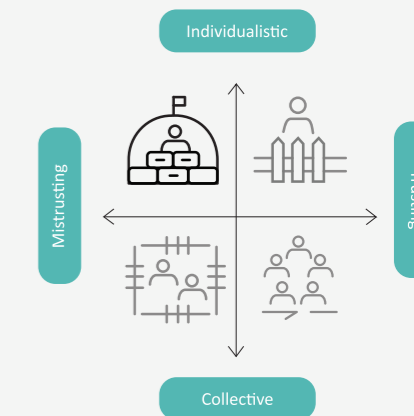
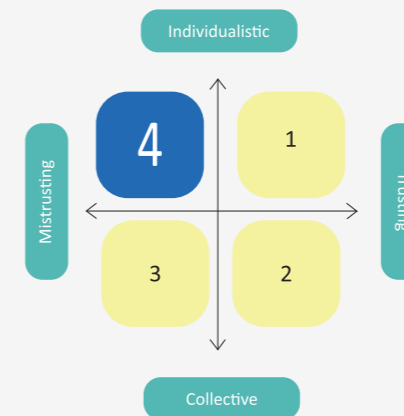
In the **Bunker World** of Sydney, 2035, Sam and Ash embody a life of independence and vigilance. Their day starts in a well-secured home, reflecting a society valuing personal liberty and deep scepticism.

Ash's school emphasises personal responsibility and survival skills in a digital age. Sam's freelance work navigates a professional world of minimal trust, where success is measured by survival and personal gain. Technology connects them to like-minded individuals but deepens societal divides. Generosity is confined to their tight-knit circle, with mistrust toward broader not-for-profit initiatives.

Evenings involve family-only online communities, sharing resources among trusted members.

## Individual and mistrusting: Bunkers

In the Bunker World, life focuses on survival, personal victories, and protecting one's own, creating a society of independence but lacking broader community support.



The **Bunker World** is focused on personal liberty and freedom, with no expectations that the system will work to improve their lot in life.

In this world, personal freedom, the power to choose, and a life free from external interference are highly cherished. There's a pervasive attitude of mistrust towards others; individuals and organisations are typically viewed with suspicion and considered self-serving until proven trustworthy. This mindset leads to a default position where self-interest is presumed to be the primary motivator behind the actions of others.

This is the world of the 'splinternet', diverse but strongly held personal views, conspiracies, charlatans and independence. It's a world of polarisation, frustration and suspicion. People are incentivised to solve their own issues (as no one else will). They get joy from personal attainment and winning. It is also a world of strong, independent individuals who survive and thrive by looking after themselves and those close to them. Loyalty, conviction and independence are highly valued.

People take responsibility for their own actions and protect those they care about. As a result loyalty, self discipline, skill, work ethic become highly valued. People have to rely on those close to them so we hold each other in our small group to higher standards.

People seek out those who agree with them, and algorithms continue to reinforce this polarisation of views. Politics swings erratically

as people are disengaged and dubious about whether their vote makes any difference. Those who harness this disaffection secure power to serve their own interests.

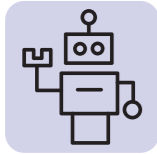
Disengaging totally from the system increases. Going 'off the grid' becomes widely accepted.

People take the law into their own hands as they cannot rely on the system to protect them. Vigilantes and personal security systems expand into the digital sphere. Paying to protect your data becomes the norm as an array of personal cybersecurity services proliferate.

Innovation is driven by sole start-ups seeking personal financial gain by meeting the needs of individuals but is hampered by a lack of sharing of data, knowledge and what is working.

Employers and employees share distrust and compensate by controlling independent contracts with pay-per-task reward structures. Government abdicates problem-solving to the individual and expects the free market to respond if the need is great enough.

**NFPs struggle to make the case for helping others through them. Generosity begins at home, and any discretionary income is directed to family members. Volunteering also becomes family-focused or provides personal benefits.**



There is low trust in technology and how data is used causing people to either retreat or embrace limited platforms. Privacy is paramount and people expect biometric protections. Paying to protect your data becomes the norm. Going completely off the grid becomes a trend.



People vote for mavericks who promise to protect them from innumerable threats and uphold their individual freedoms. Politics becomes further fragmented and polarised with extreme positions gaining attention. People disengage from the political process and focus on their personal immediate needs and surroundings. Less people vote.



Home schooling and personalized tutoring flourish, allowing education on personal terms. Standard curriculums fade as choices reflect individual worldviews. People prioritize immediate, practical learning, often through online platforms and influencers, embracing applied knowledge.



Media stories are increasingly rebellious and take a single story as the embodiment of truth above facts and evidence. Fake news increases with AI and people opt out of other's realities. "You can't believe anything so why listen".



Unable to rely on others, people take protection, security and the law into their own hands. They fight to extend gun rights. They expect the system to respect their freedom to maintain their safety.



People buy from people, not organisations, as they seek to minimise risk of exploitation. Self-employment, gig economy and airtasker-type supply and demand thrives. Companies have controlling and highly monitored accountabilities for staff with limited scope for self-expression or pursuits.



Fractured. Personal Freedoms. Self-reliance. Independence. Entrepreneurialism. Rebels and Mavericks.. Suspicion. Isolation. Achievement. Competition. My truth. Alternative. Competitive.



Heroes: people taking responsibility for themselves, winners of Alone, the lone wolf protector, those who successfully sue, those who silently get on with it and make it work  
Scandals: imposition of seemingly irrelevant pointless laws which benefit others.



Generosity shifts to self-serving, transactional exchanges, driven by self-interest and skepticism. Doubt dampens altruism, pushing giving towards direct, individual connections, sidelining traditional charities. Donations stem from excess, not sacrifice. Funding targets specific, named outcomes, embodying the adage "charity begins at home." Trust, scarce yet enduring, turns supporters into lifelong partners once established.

### Potential signals this world is emerging

- Decreasing number of charitable gifts-in-wills and increasing contestation.
- Growth of personal fundraising through new competitors to GoFundMe.
- Rising number of defamation cases.
- Increased personal security and data protection services.
- Increase in contract work and performance-based pay.

### Implications for NFP's

Address doubts	NFPs will need to cede control to supporters, allowing them to engage on their terms or not at all. Overcome security concerns and be restrictive on the use of data.
Direct: Self fundraising	NFPs will need to move from case studies to cases where individuals are raising funds for their own benefit and using the NFP as an enabler and bank.
Agents	NFPs will need to engage a wide range of connected agents who can infiltrate the defences of reluctant donors through their personal connections and credibility.
Radical transparency	Not only will NFPs need to prove their impact, but they will also have to show how they are treating staff and supporters. Measuring and reporting on the donor experience will be key to donor decision-making.
Reward	People will seek direct personal gain from their giving. They may be more likely to get these benefits from their consumer decision-making than from altruistic acts. NFPs will have to carefully craft the emotional rewards from giving on a very personal basis.
Anticipate	In World 4, people are less forgiving, less trusting of NFPs and are more self-interested in their decisions. NFPs must anticipate and exceed expectations.
Bravery	In this World, people are both frustrated by historic failure and motivated by personal benefit. Traditional solutions have failed, and NFPs may need to be more radical.
Connect	NFPs will move from the promotion of their brands to fostering relationships through connected ambassadors and agents who are already immersed in the tightly held networks in this society.

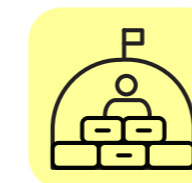
## The challenges for the Bunker World

- **Erosion of Collective Impact:** The focus on individual needs could diminish the collective impact of NFPs, limiting their ability to address broader societal issues.
- **Resource Scarcity:** The inward focus and scepticism may lead to a scarcity of resources, as people prioritise personal and immediate family needs over community or societal contributions.
- **Fragmentation of the Sector:** The NFP sector might become highly fragmented, with organisations struggling to build a broad base of support and instead catering to niche, individualistic interests.



## The opportunities for the Bunker World



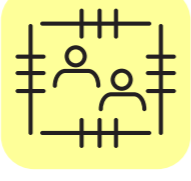
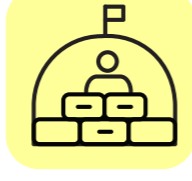
- **Boost in Entrepreneurial Initiatives:** This world could spur a rise in entrepreneurial social ventures, with NFPs innovating to meet specific individual needs creatively.
- **Increased Personal Engagement:** The focus on personal relationships could lead to deeper, more meaningful engagements between NFPs and their supporters.
- **Advancement in Privacy and Security:** The emphasis on data protection and privacy could lead to advances in cybersecurity and data handling practices within NFPs, benefiting the sector as a whole.



### Experiments NFPs may need to conduct in the Bunker World

- Shape your messaging to how contribution will 'help protect our own.'
- Decentralise the organisation to appear more local.
- Take decision making and resourcing away from head office and give it to branches.
- Scale up the ability of the organisation to build individual to individual connections. Consider hiring people for their connections.

# Summary implications for each world

Aspect				
Fundraising	Celebrity-led, personalised experiences	Collaborative, community-focused models	Hyper-localised, community-specific initiatives	Direct, individual-focused, peer-to-peer methods
Message Framing	Self-advancement and personal brand-building	Social equity and environmental sustainability	Community empowerment and protection	Individual self-sufficiency and personal security
Engagement	Influencer and technology-driven	Community-driven with a focus on collective action	Community-centric with localised communication	Direct, personalised, and trust-based
Operational Structure	Flexible, tech-driven, and personal brand-focused	Collaborative, flat structures, community decision-making	Decentralised, community-owned and involved	Individualised, privacy-focused, self-reliant
Positioning	Personal achievement and influencer endorsement	Collective benefit, unity, and inclusivity	Protective, niche-focused, and exclusive	Self-reliance, personal freedom, and individual success
Demonstrating impact	Individual success stories, personal impact	Collective benefits, community achievements	Localised, community-specific impact	Tangible, immediate individual benefits
Community contribution	Personal attainment and status-driven	Community welfare and shared responsibility	Protection and advancement of local interests	Personal survival, independence, and mistrust

# Common implications for Not-for-profits

## 1. Be ready.

Our research illuminates how infrequently NFPs take the time to consider longer-term horizons and systemically explore possibilities. Undoubtedly, the future is uncertain, and NFPs must play a significant role in civic society. NFPs and the sector should regularly practice scenario mapping.

### We must:

- Develop and deliver a process for regularly updating and reviewing the Four Futures in a collaborative and diverse way.
- Establish monitoring of key signals.
- Encourage the adoption of futures thinking and scenario mapping across the sector.

## 2. Shape the narrative.

NFPs are not mere observers of the emerging world but agents influencing how society evolves. As a sector, NFPs must protect fragile trust, demonstrate impact and strengthen relationships. We must be ready for changing expectations. We must take control of the narrative and contribute to building the societies we desire.

### We must

- Create simple ways for people to understand and value our impact.
- Shift judgment away from the cost ratio as an indicator of performance.
- Illuminate and celebrate the difference we make to society.
- Ensure investments in organisational capacity are respected and valued.
- Protect data integrity.
- Uphold the highest standards in how we treat our staff, volunteers and beneficiaries.
- Manage the emergence of AI – authenticity is our superpower.

## 3. Maintain relevance.

In each world NFPs will face increased competition for attention, data, voice, time and money. Whilst the source of competition varies, the NFPs must demonstrate our unique contribution and value to society.

### We must be clear on the value we add:

- **Equality** – we ensure those in greatest need get the help they deserve, not just those with the best story.
- **Integrity** – we act in the best interests of those in need, not customers, donors or shareholders.
- **Expertise** – making change is our core purpose; we have built up experience and evidence over decades.
- **Accountability** – we are well-regulated, open to scrutiny and transparent in our actions.
- **Quality-focused** – we ensure the highest standards of service to meet the needs of the community.
- **Long-term** – this is our world; we are here for as long as it takes; it's not a fad or at the whim of a company.

## 4. Listen and connect.

Throughout the Worlds, there is a uniting desire to be understood. NFPs have improved their insights and understanding of supporter motivations in recent years. NFPs need to deliver better supporter experiences by seeking and acting on fast feedback, communicating in ways that resonate with different audiences and deepening connections.

### We must:

- Develop and deploy motivational communication frames.
- Systematically gather and respond to supporter experience feedback.

- Establish a mechanism for aggregating and leveraging supporter feedback.
- Apply lessons from the membership economy to relationship management.
- Better connect with business and employees on a deeper, wider basis to achieve more far-reaching outcomes.

## 5 Nurture talent.

In each world scenario, recruitment strategies, employee expectations and ways of working differ. However, NFPs will always face stiff competition for the talent required to deliver their mission. To win the talent wars NFPs need to be clear on the skills they require and better position the rewards and opportunities of working in the sector.

### We must

- Create seamless pathways for talent with business and government.
- Identify and deliver meaningful micro-volunteering to engage time-poor communities.
- Ensure greater technology, cybersecurity, marketing, digital, innovation and customer experience representation on boards.
- Invest in mapping the skills required for the future and develop talent accordingly.
- Balance the right to competitive rewards with the desire to do good.

## 6 Make the case for receiving generational wealth transfer.

The Productivity Commission estimates that compared to recent history, almost four times the amount of money will flow to nearly half the number of people over the next 25 years, creating a massive opportunity for NFPs. NFPs must seize the opportunity with stronger Gifts in Wills programs and inheritance-giving mechanisms.

Gifts in Wills income makes up 22% of income (More Profitability Benchmarking) at a staggeringly high return of 24 to 1. Yet only around 12% of Australians have included a gift in their will.

### We must

- Invest seriously in Gifts in Wills marketing at all NFPs.
- Massively expand the Include a Charity Campaign to influence decision-making.
- Partner with key influencers more effectively to ensure a share of an estate is included in every will.
- Invest in innovation in the gift-in-will space.
- Ensure all pathways in all fundraising ultimately lead to a gift-in-will consideration.

## 7 Engage the next generation.

Our 2021 study showed that NFPs were not meeting the needs of those under the age of 35. The under-35 cohort will not only inherit one of our four worlds but will be instrumental in determining which emerge. NFPs cannot rely on the notion that, in the future, people will have the capacity and inclination to support them as they age.

We must prepare for the future today by deepening our engagement with younger people, giving them a voice and better meeting their needs.

### We must:

- Be visible and relevant in the digital worlds where younger people are.
- Offer tangible, specific ways to give with authentic messaging from lived experiences.
- Innovate in Social Fundraising to capture their need for experiences and exposure.
- Help them belong, find their purpose and voice within our world.
- Normalise giving and make the case for giving being an important part of their personal budgeting.

# Appendix A

## The world in 2035

Whilst most conversations about the future are either inspired by dystopian movies and TV Shows (think Black Mirror!) or technology (we'll travel on hoverboards and have holograms in our homes), there are some common themes:

*“Hotter. More Expensive. Older.” That’s the view of Australia’s Commonwealth Scientific and Industrial Research Organisation [CSIRO].*

*According to the CSIRO’s Our Future World, the global megatrends that will shape the way we live in Australia 2030 are:*

### i. More from less

Increasing demand for limited natural resources and a scarcity of these resources: water, energy, food, and biofuel production. Resource conflicts: declining mineral ore grades and the rise of recycling (mining above the ground).

### ii. Going, going... gone?

A window of opportunity to protect biodiversity, habitats and the global climate: biodiversity decline; habitat fragmentation; deforestation; an increasing number of protected areas –efforts are increasing; climate change impacts.

### iii. The Silk highway

Rapid economic growth and urbanisation in Asia and the developing world: the rise of China and the other BRICs; a growing middle class; tourism export growth; global commodity prices.

### iv. Forever young

An ageing population, changed retirement patterns, chronic illness and rising healthcare expenditure; more older people and increasing life span; retirement savings gap; changed retirement models; healthcare expenditure.

### v. Digital immersion

Digital technology reshaping retail and office precincts, city design and function and labour markets: freelancing models; potential demand for teleworking; collaborative consumption.

### vi. Porous boundaries

Digital technology transformation combined with globalisation will reshape organisational designs, governance systems and employment models. The peer-to-peer economy bypasses traditional systems.

### vii. Great expectations

Changing consumer expectations for services, experiences and social interaction: declining relative material consumption; increased spending on education, culture and entertainment; fewer but stronger social interactions; innovative personalisation; rising importance of moral and ethical dimensions for consumers.

Given the rising expectations of the role Artificial Intelligence [AI] will play in our lives, we thought we should ask ChatGPT what the world will be like:

**i. Sustainability and Climate Action:** The focus on sustainability and addressing climate change is expected to intensify. Efforts to reduce greenhouse gas emissions, transition to renewable energy sources, promote circular economies, and combat environmental degradation will likely become increasingly important.

**ii. Technological Advancements:** Rapid advancements in technology are likely to continue, with a focus on artificial intelligence, automation, robotics, and the Internet of Things. These technologies have the potential to revolutionise various industries, such as healthcare, transportation, agriculture, and manufacturing.

**iii. Urbanisation and Smart Cities:** The world's population is projected to grow significantly, leading to increased urbanisation. Smart City concepts, incorporating technology to improve infrastructure, transportation, energy efficiency, and citizen services, are expected to become more prevalent.

**iv. Demographic Shifts:** Changing demographics, such as aging populations in many countries and increasing urbanisation in developing nations, will significantly affect healthcare, social services, and workforce dynamics.

**v. Digital Transformation:** The ongoing digital revolution will likely continue with increased connectivity, data-driven decision-making, and the proliferation of digital platforms and services. This transformation will impact various aspects of society, including education, commerce, governance, and communication.

**vi. Disruption in Industries:** Various industries are expected to experience disruptive changes. For example, renewable energy may increasingly replace traditional fossil fuels, autonomous vehicles could reshape transportation systems, and the rise of e-commerce may transform retail and logistics.

**vii. Changing Workforce Dynamics:** Automation and artificial intelligence will likely impact the job market and workforce dynamics. While some jobs may be automated, new roles requiring skills in technology, creativity, and adaptability may emerge.

**viii. Health and Well-being:** Advances in healthcare and biotechnology may lead to improved treatments and prevention strategies for diseases. Additionally, mental health and holistic well-being are likely to receive increased attention.

**ix. Geopolitical Shifts:** Global power dynamics may continue to evolve with the emergence of new economic and political players. Issues such as international trade, cybersecurity, and geopolitical conflicts will shape the geopolitical landscape.

However, these ChatGPT observations largely comment on trends that are underway and, to varying degrees, known and understood.

## Appendix B

### Megatrends and forces for change

A megatrend refers to a significant and pervasive shift or development that has a profound and long-lasting impact on various aspects of society, the economy, technology, and culture. These trends often emerge from a combination of factors, such as technological advancements, demographic changes, societal shifts, and economic forces. Megatrends are not short-lived fads; they tend to unfold over years or even decades and have a transformative effect on multiple industries and the way people live and work.

'Megatrends' are a predictable continuation of a pattern that has already emerged. For example - The continued move toward sustainability.

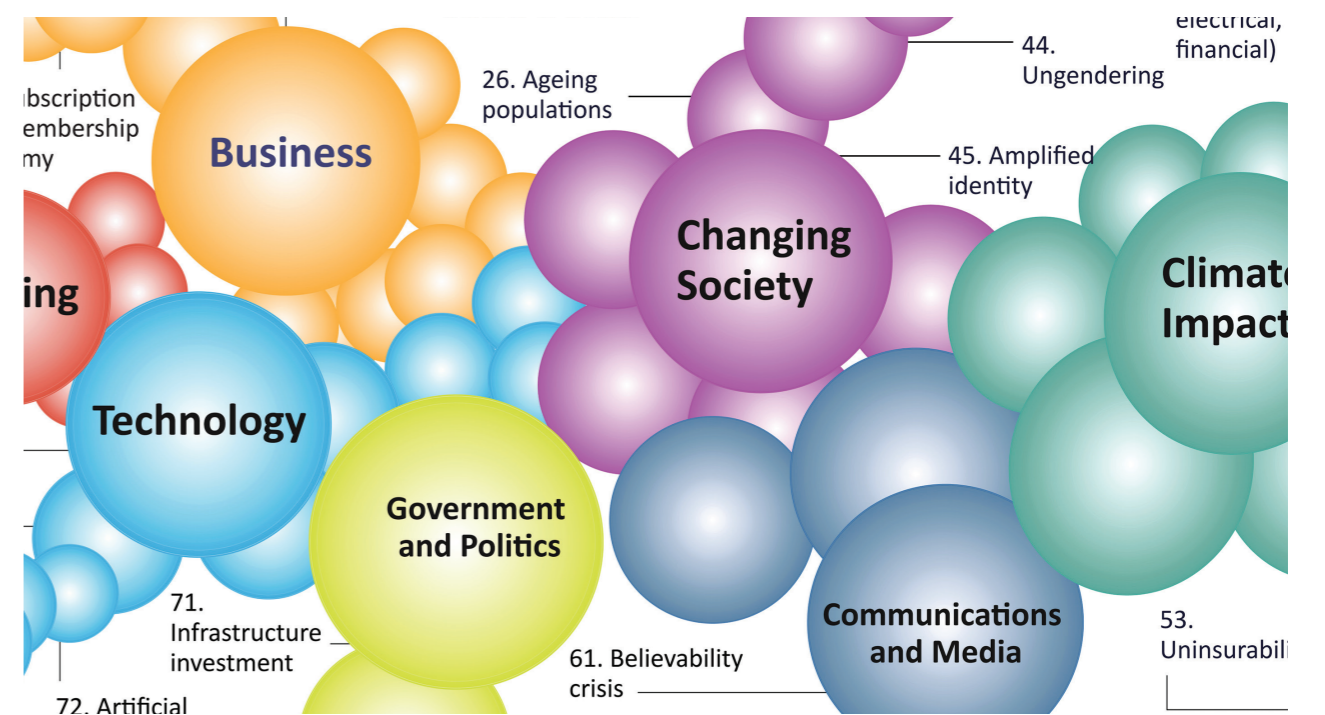
'Axes of Uncertainty' is a continuum that describes two possible directions that might be taken - For example - Society might become more collectivist and community-focused, or it might become more individualistic and self-expressive.

Megatrends form the backdrop on which we use 'Axes of Uncertainty' to map and explore scenarios.

In the context of our scenario mapping, **trends are the things that are likely to happen:** they are "probabilities" rather than "possibilities" and, as such, **form a backdrop to the scenarios** rather than being the factors that define the options.

**One hundred trends** were identified from multiple sources. They covered transformative, far-reaching global changes through to the minutia of daily life. All were explored as stimuli to identify the "axes of uncertainty".

See map at page 14 and 15.



## 30 Forces for change explained

Force	Description
Humanisation	A reaction against technology that separates, segments and sets us against each other. People seek out and place greater value on authentic, empathetic acts undertaken by real humans.
Attention Efficit Disorder	In the information economy of fragmented, overwhelming content and channels, our attention is diminishing but remains the most valuable resource people (governments, businesses and organisations) compete to attract, manipulate and leverage.
Data Overflow	The volume of data rises exponentially whilst our ability to interpret and use it is outsourced to machines. Our data-reverent culture values and trades on information.
Charged Up	As we shift to mass-scale electrification, the way we invest, live and share will transform society.
Charitalism	Eager to acquire and retain new customers and staff with much higher ESG expectations, capitalism blurs with charity. Why donate when I can get tangible benefits as well as the warm glow?
Brandstanding	Companies (Qantas)and organisations (NRL, AFL etc.) increasingly take a public position to enhance their reputations.
Eco Divide	Electrification at a personal level becomes a choice afforded to the wealthy and middle class, creating an electrical divide impacting health and wealth.
Charge loitering	How and where we shop shifts as we loiter whilst recharging at commercial local recharge centres.
Eco communities	Community batteries are adopted and enhance connections.
Social credit	Social credit – bidirectional ratings become the norm and determine access to resources.
Data pollution	Competitive advantage comes from interpretation, not generation of data. Open data systems accelerate decision-making but introduce more data pollution.
Attention arms race	Attention races to the bottom with more outrageous, shocking and awe-inducing claims. Grandstanding and failed fulfilment of the hype leads to scepticism and distrust. Manipulated outrage with preached anger, getting attention for whatever and whoever. Reliance on curators to guide our limited attention which further narrows our perspective
Human premium	Human interaction becomes a premium service available to the few whilst the masses are managed through AI. The marginalised get tailored opportunities, connections and are championed. The loneliness epidemic is addresses by virtual avatars.
Protective Tech	As we rely on technology to make our lives easier and protect us we sacrifice control over our privacy. We are ceding decisions about our well-being to machines.
Amplified identity	People take power over their own stories but struggle to retain control of their chosen narrative with deepfakes. Public shaming is used to define the boundaries of what some people (often the loudest) want to be normal. Who owns and manages our digital identities when we die?

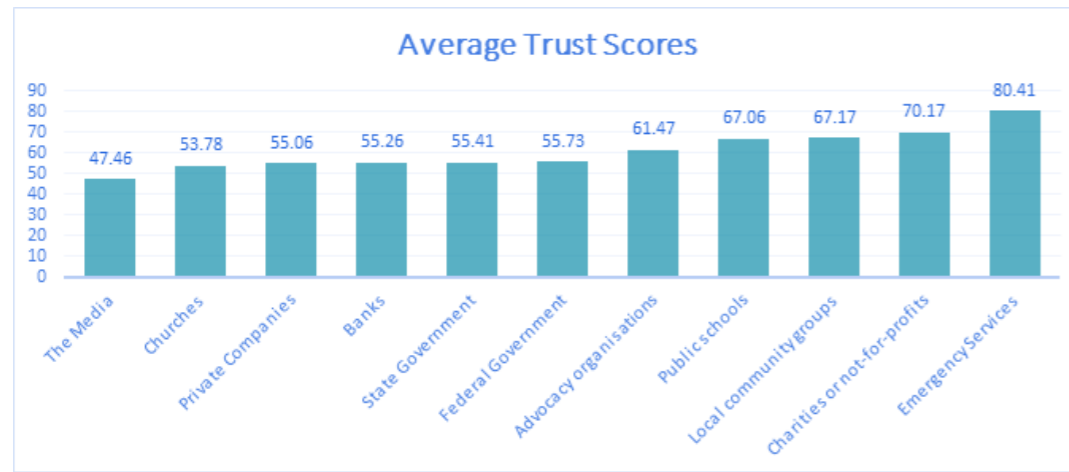
Disruptive distribution	We haven't changed what we buy so much as how we buy it. We have moved from ownership to access. We have a low commitment to the upfront investment in things—price bots for surge pricing across all categories, not just Uber.
Ungendering	Traditional gender divisions are becoming more fluid, forcing a re-evaluation of how we see employees, customers, brands and each other.
Instant knowledge	We consume bite-sized knowledge and become seemingly expert in many subjects but overlook the time for mastery and value in wisdom. We become superficial, impetuous and righteous. How much do we seek out and trust experts when everyone claims to be one? We are watching our videos at 1.5 times the speed and shortcutting the depth of understanding.
Revivalism	As a reaction to the overwhelming influence of technology and the sense that life is too complex and shallow, we place higher value on simpler experiences and nostalgia that remind us of more trustworthy times. But the “good old days” are also used to justify racism, anti-immigration and protectionism. We revisit the brands of our youth, with movie franchises, old bands touring. We value the rare, the artisanal, the unique.
Responsi bubble	Our feelings of care and responsibility become narrowed to our ever more diverse “in-groups” of like-minded thinkers. We only care and act to support and protect those we perceive as in our bubble
Influence Erosion	As we age, we believe we are less influenced and less influential. Our idealistic enthusiasm is replaced by sceptical apathy and naïve nostalgia.
Ageing World	The old-age dependency ratio (OADR) is increasing rapidly in most developed countries. Driven by rising prosperity, later marriages, fewer children, and improved healthcare, the shape of the demographic bulge will shift upwards.
Decentralised distrusted media	Changes in the barriers to entry (capital, talent, reach, regulation, speed) have democratised communications. We now consume five times more information per day than in 1980. Rising distrust of media sources (69% increase in distrust in the US in 10 years to 2018). Filter bubbles of limited, narrow content polarise views.
Rising in-equality	The CEO-to-worker compensation ratio in the US has risen from x24 to x320 over the last 50 years, driven by decreased unionisation; rising living and medical costs; requirement, costs and access to further education; unequal access to investing; unequal wage growth; demand for skilled workers.
Digital Dangers	We are creating, sharing and capturing more data than ever at an exponential rate. Overload is where data input exceeds our (human) processing capacity, leading to poor decision-making: rising cybercrime and impact of avoidance techniques on engagement (call, ad filtering).
Peak Globalisation	Following the GFC and Pandemic, countries are taking increasing steps to control their own destiny. They no longer want reliance on a single (enemy) tech provider and see the importance of local capabilities in core areas.
Dwindling corporate longevity	In times of rapid technological change, companies that fail to adapt will become obsolete, niche or be taken over. Investment in R+D now far outstrips advertising, as competitive advantage is sought through innovation. The average lifespan on the S+P 500 is at a historic low of 22 years and dropping
Believers	People are forming closer, niche (digital) networks of hobbyists to fulfil their need for a sense of community. People move from loyalty to community to participation where they influence the brand.

# Appendix C

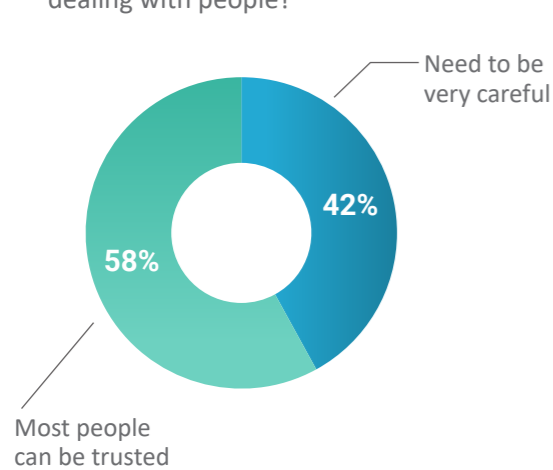
## The public perspective

To establish some baseline indicators for Australia, we conducted a public survey of 1,008 Australians, with state, age and gender representation. The sample was weighted towards not-for-profit donors, with 80% having to have donated more than \$20 in the last 12 months. The survey was completed online between November 10th and 27th, 2023, with a panel sourced from Qualtrics.

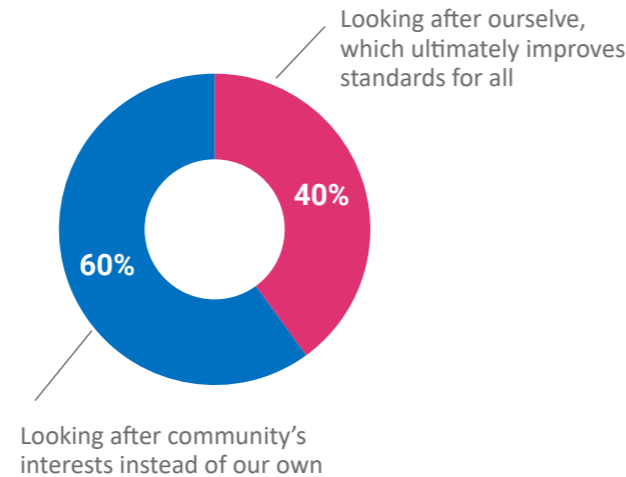
### Trust levels



**Q22.1** - Generally speaking, would you say that most people can be trusted or that you need to be very careful in dealing with people?



**Q24.5** - Do you think quality of life in Australia is best improved by:



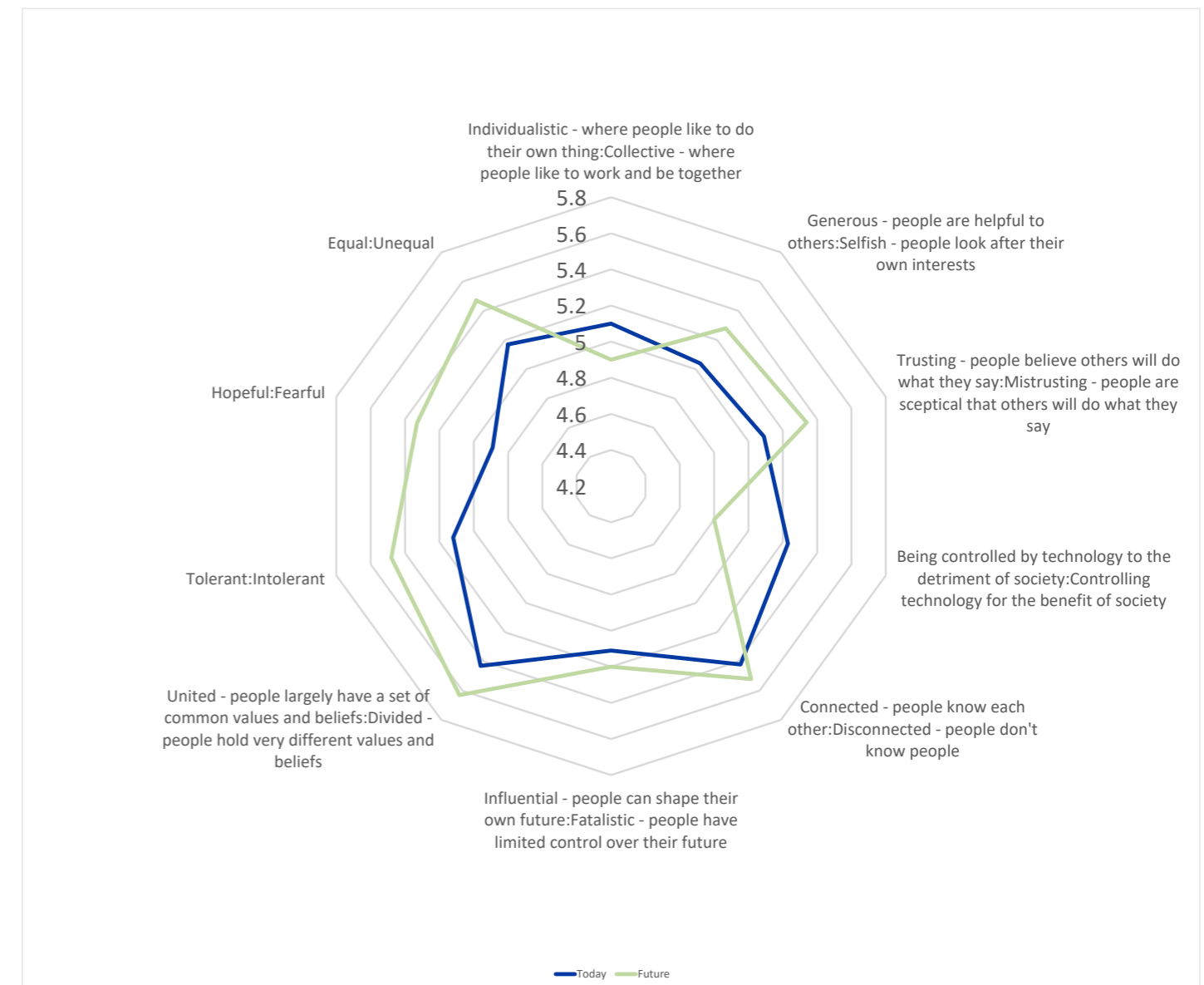
This snapshot suggests that Australians are broadly:

- Trusting of others
- Focused on community interests
- Highly trusting of charities or not-for-profits

### Axes of uncertainty

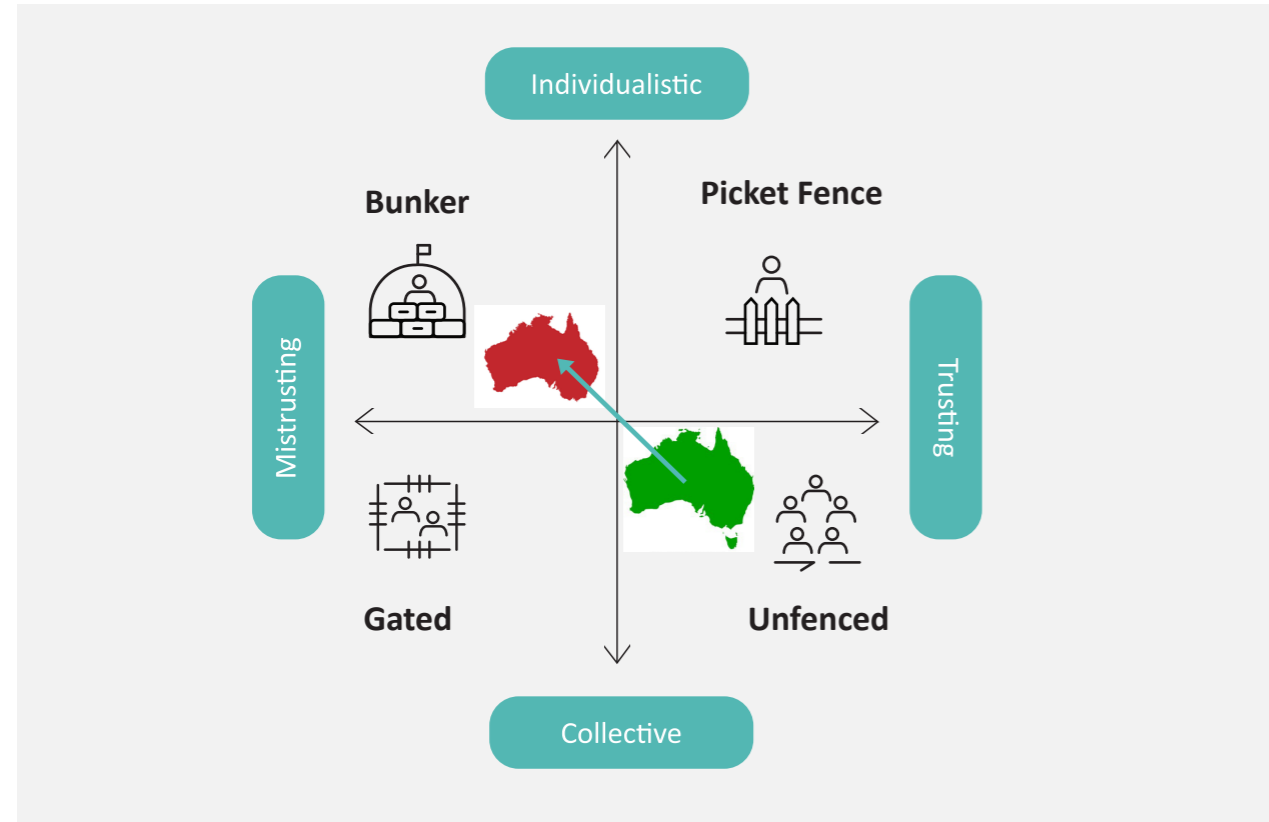
We tested a variety of axes to understand where Australians perceived society is and is moving towards. This was scored on a 10-point scale. People generally cluster towards the middle, but it is worth noting that, broadly, Australians feel society is going to become slightly more:

- Selfish
- Mistrusting
- Intolerant
- Fearful
- Unequal
- Generous
- Individualistic
- Able to control technology



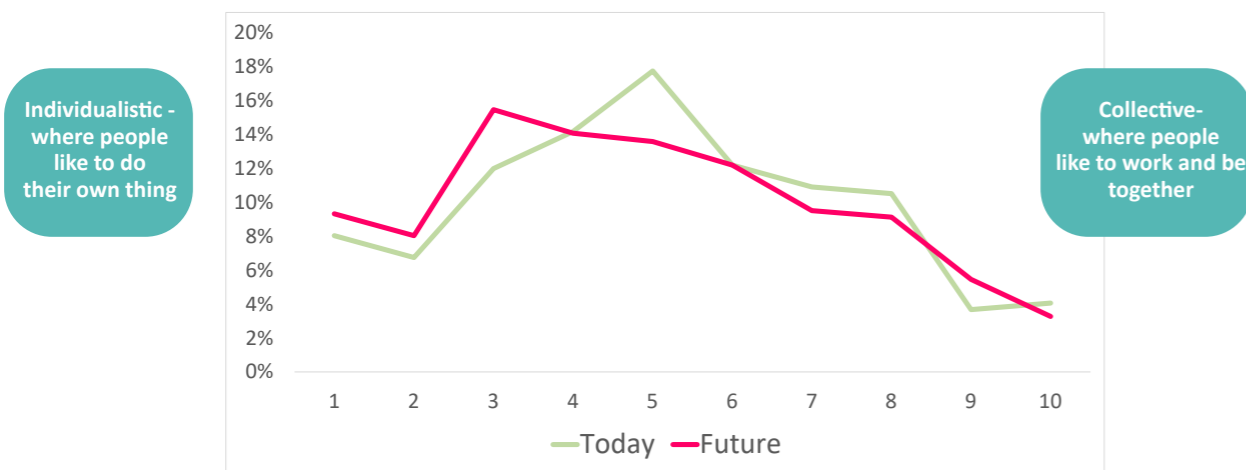
## Selected axes

For our selected axes, we found our starting point for Australians overall was very centred, with an average score of 5.1 out of 10 for the current balance of individualistic and collective, i.e. a very slight bias towards being collective. This bias was expected to shift towards the individual with an average score of 4.9. Most Australians don't anticipate significant change.

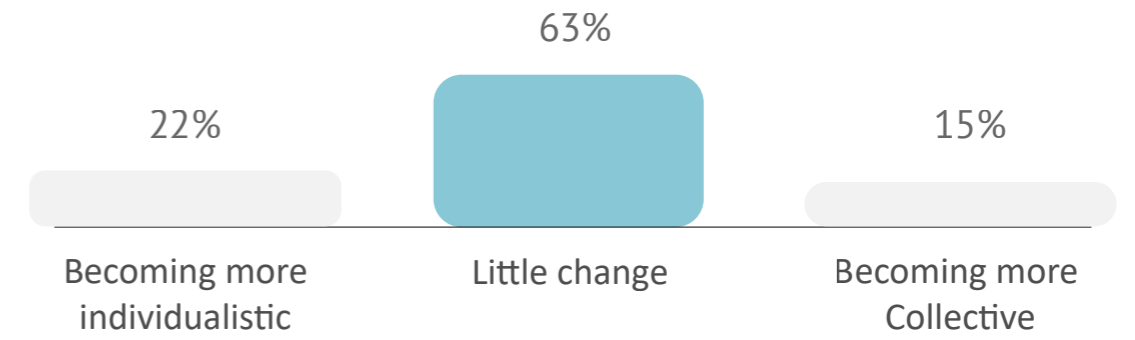


## Key Today. Future.

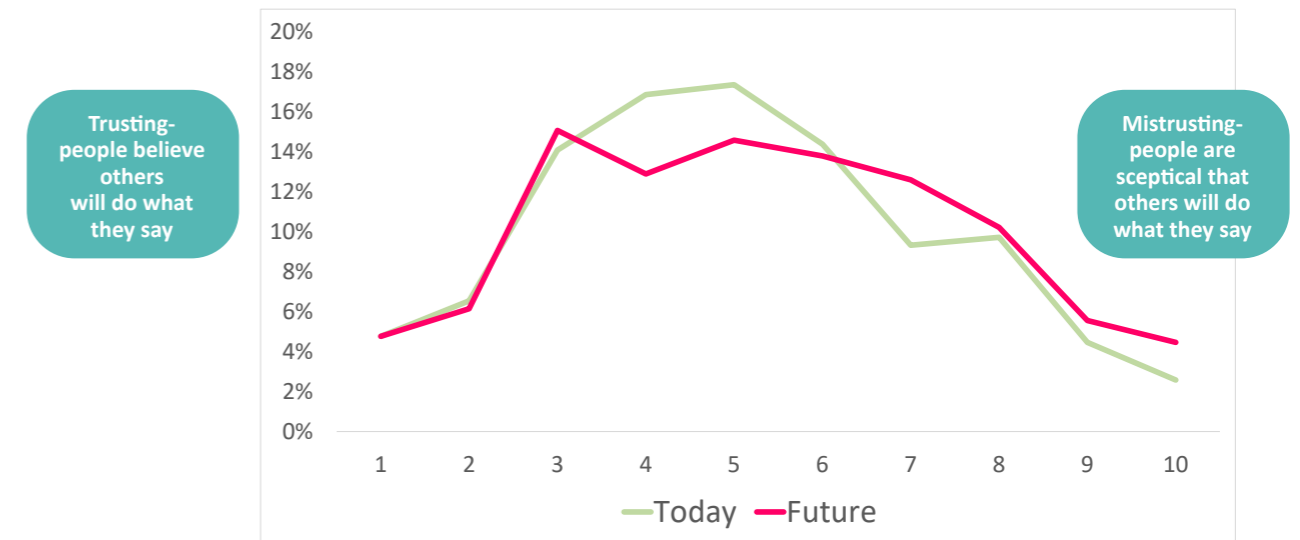
### Distribution and shifts



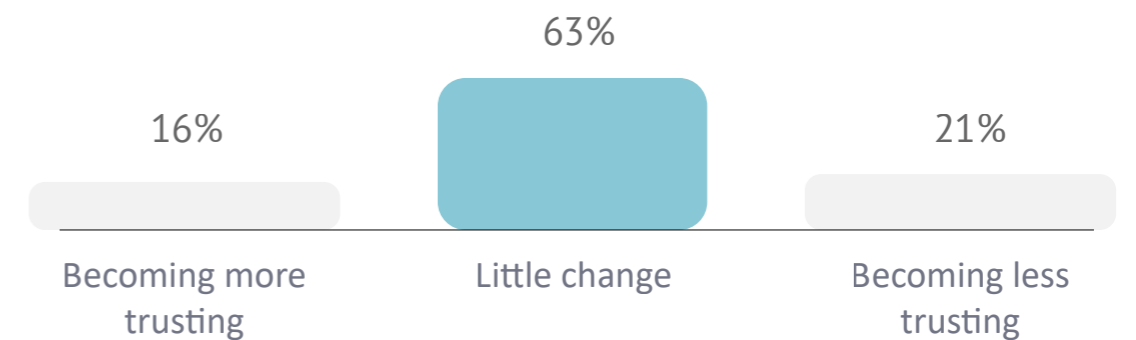
## Direction



It was a similar story for the current levels of trust, with an overall average score of 5 out of 10 expected to become slightly less trusting with a score of 5.3.

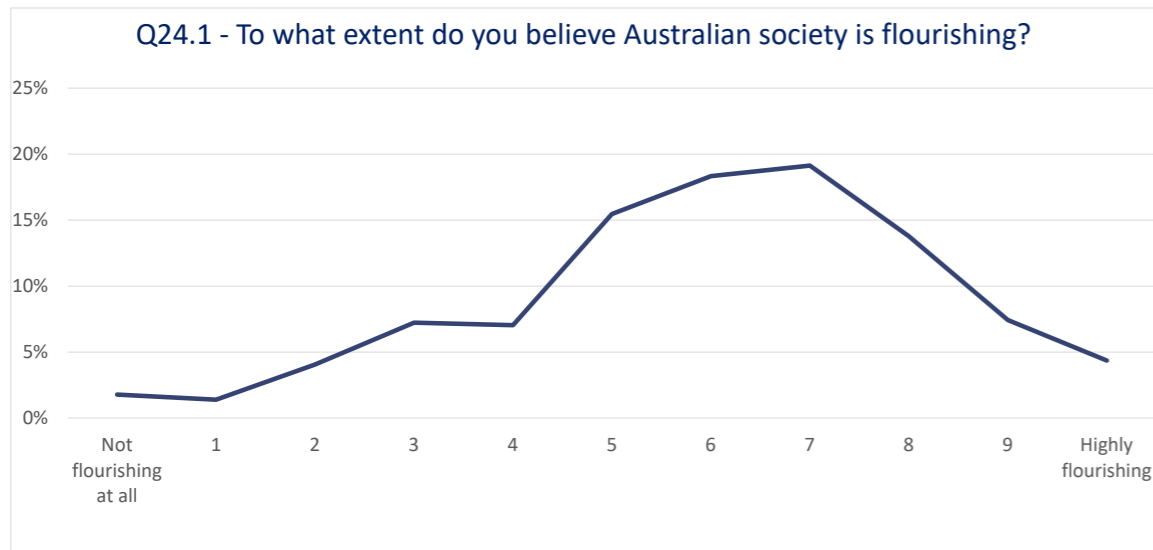


## Direction

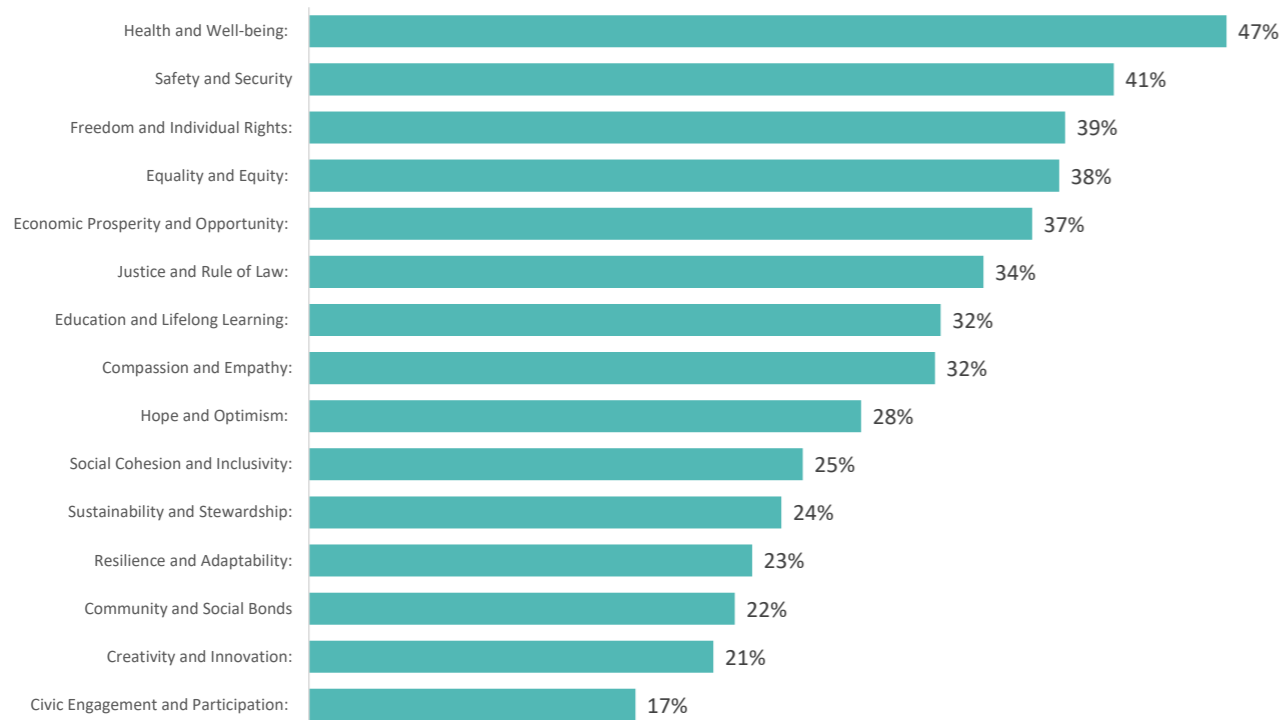


## Flourishing

Inspired by some of the conversations conducted as part of this research project, we also wanted to explore whether people believe Australia is flourishing and what indicators people see as signs of a healthy society and economy.



Signs of Flourishing



## Aspects of flourishing

Respondents were asked to select five aspects from the list below that best reflected a flourishing society. These are listed in order of the most commonly chosen aspects in the top five:

- 1. Health and Well-being:** good health and well-being are fundamental; investment is made in healthcare and public health, ensuring society's physical and mental well-being.
- 2. Safety and Security:** high levels of public safety, creating environments where people can live without fear.
- 3. Freedom and Individual Rights:** personal freedoms and individual rights are upheld, allowing people to express themselves, make choices, and live by their values.
- 4. Equality and Equity:** ensuring all individuals have access to basic rights, opportunities, and resources regardless of their background, race, gender, or socio-economic status.
- 5. Economic Prosperity and Opportunity:** economic stability, prosperity, and access to opportunities are essential as they provide the means for people to meet their basic needs and pursue their goals.
- 6. Justice and Rule of Law:** upholding the principles of justice, fairness, and the rule of law. It provides a legal framework that protects individual rights and maintains order.
- 7. Education and Lifelong Learning:** education is highly valued, and access to quality education and lifelong learning opportunities are encouraged, empowering individuals to reach their full potential.
- 8. Compassion and Empathy:** promoting a culture of caring for one another and supporting those in need.
- 9. Hope and Optimism:** people have confidence in the future and a sense that their efforts will lead to positive outcomes.
- 10. Social Cohesion and Inclusivity:** celebrating diversity and encouraging social cohesion, embracing and respecting differences, and fostering a sense of belonging for all members.
- 11. Sustainability and Stewardship:** recognising the importance of environmental stewardship and aiming for sustainable practices to ensure a healthy planet for future generations.
- 12. Resilience and Adaptability:** being capable of facing challenges and adapting to change with a positive outlook.
- 13. Community and Social Bonds:** strong interpersonal relationships and a sense of community play a vital role in reducing isolation and loneliness.
- 14. Creativity and Innovation:** fostering creativity and innovation, encouraging new ideas, arts, sciences, and technological advancements.
- 15. Civic Engagement and Participation:** citizens actively contribute to shaping their communities and societies.

# Appendix D

## Acknowledgements

Our great thanks go to all those who gave their time, energy and intellect so willingly to this project – you are all superstars. We especially want to acknowledge those who took part in the Futures Retreat and so eagerly took up our vague invitation to “spend 2 days living with people you don’t know, exploring a subject that is not your speciality”. To say people entered the spirit of the weekend would be an understatement, it was truly memorable (especially for those of us still there for the epic Matilda’s penalty shootout).



**Martin Paul, Director, More Strategic**

<https://www.linkedin.com/in/martinpaul-more/>

**Rod Mathews, Leadership, team and personal development, change facilitator**

<https://www.linkedin.com/in/rod-mathews-57bb215/>

**Katherine Raskob, CEO Fundraising Institute Australia**

<https://www.linkedin.com/in/katherineraskob/>

**Lisa Allan, Head of Fundraising, The Smith Family**

<https://www.linkedin.com/in/lisa-allan-ffia-and-maicd-3ba13246/>

**Benny Littlejohn, Director of Fundraising, UN Refugee Agency, Australia for UNHCR**

<https://www.linkedin.com/in/benny-littlejohn/>

**Jo Rose, Consulting and Design Lead, Institute of**

Public Administration Australia

<https://www.linkedin.com/in/jo-rose-a45b6623/>

**Steve Messenger, mechanical and technical engineer**

<https://www.linkedin.com/in/steven-messenger-a46650158/>

**Michael Ziviani, CEO Precise Value**

<https://www.linkedin.com/in/michaelziviani/>

**Simon Roller, Director and Principal Consultant, SR Advisory (IT)**

<https://www.linkedin.com/in/simonroller/>

**Tim Bedding, Professor of Astrophysics, University of Sydney**

<https://www.linkedin.com/in/tim-bedding-ab311a8/>

**Julia Cohen, GM, Work Health and Safety, The Salvation Army**

<https://www.linkedin.com/in/juliacohen777/>

UTS Graduates from Business Creative Intelligence and Innovation course:

Callam Paul, Emma Ramsey; Olivia Wakeling; Sina Crestani; Lui Dereck

NSW Young Liberals: Chelsea, Alex, Cesar, Ivan, Prue and Georgia

Fundraising staff from The Smith Family and Australia for UNHCR: Lavina Huggett;

Siobhan Hanbury; Judith Proietto; Thuy Howang

More Tribe: Ruth Wicks, Karen Armstrong, Gavin Coopey, Lisa Kastaniotis, Katynka Powning,

Jess King, Megan Maya, Caitlin Crowther, Liz Paul

# About the project

**The project:** Martin and Rod initially connected through their love of football which both are ill-advisedly still playing. They soon found a shared common interest in how society may evolve. Eager to provoke fresh conversations and explore longer-term horizons, they plotted a pathway to bring diverse opinions together. The resultant Futures Retreat brought an eclectic group of people from a wide variety of backgrounds together to share meal preparation, facilitate discussion and celebrate disagreement. Further sessions with fundraisers, activists and thought leaders enriched the insights.

**Our hope:** We never set out to answer the question “what will the future be like?”. No one really knows. Our hope for this work is that it inspires and encourages more frequent and deeper conversations about “what might be”. This in turn, will help NFPs prepare for uncertainty, position themselves for different possibilities and begin to shape the narrative.



**Martin Paul** is one of Australia’s most experienced and respected fundraisers. He has a passion for evidence-based decision-making in the not-for-profit sector. He always wants to understand why people do what they do.

With a background in economics and marketing, Martin led fundraising teams at the National Trust and WWF in the UK before moving to Australia and joining The Heart Foundation and Cancer Council. In 2008, Martin co-founded More Strategic and has worked with over 150 Not-for-profits to develop insight-driven strategies. In the past three years, Martin has managed more than 30 research projects into donor motivations. There’s nothing he enjoys more than listening to the caring, compassionate, kind people who, through their contributions, make the world a little better. Martin is a popular presenter at fundraising conferences in Australia, Europe and Asia.

Martin works with not-for-profits to:

- Develop insight-based strategies
- Benchmark and improve fundraising profitability
- Understand and influence supporter behaviour

**Rod Matthews** has an international reputation as a leading authority on change, leadership and human performance. He has a deep passion and natural skill of engaging groups of people and creating a shift from confusion and sometimes even hostility to a place of confidence, clarity and consensus. Rod works with leaders, leadership teams and organisation to build engagement and performance.

Rod works for all organisations across all industries – wherever there are people. For over 25 years his experience, enthusiasm and natural curiosity have allowed him to build an encyclopaedic knowledge of tips, tools and techniques that inspire, motivate, inform and educate.



*“We must look beyond the short term planning cycles, prepare for, and shape our future”*

**Contact Martin**

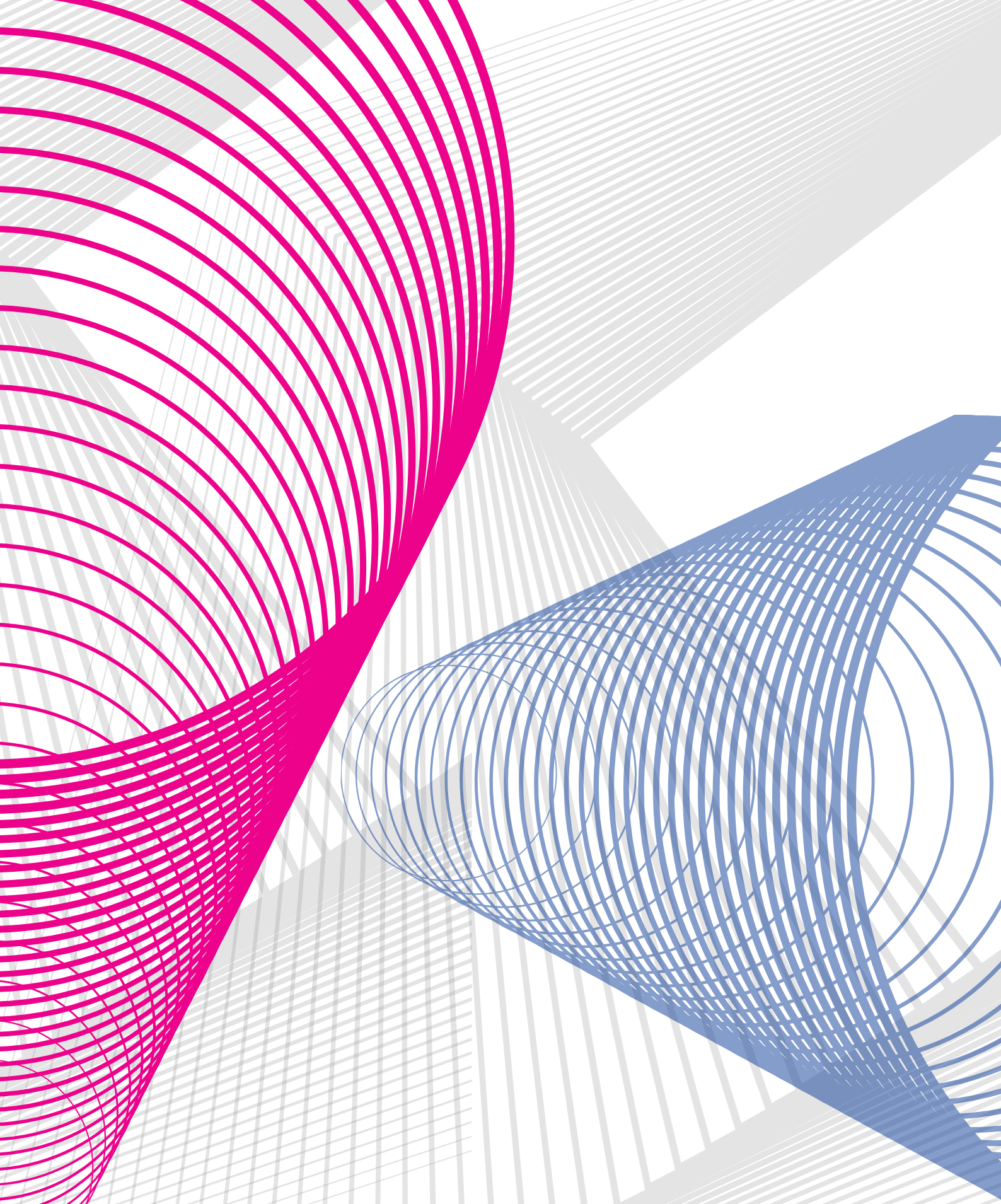
- @ martin@morestrategic.com.au
- 0435 306 202
- www.morestrategic.com.au



*Regular conversations about possible futures build organisational engagement, performance and adaptability”.*

**Contact Rod**

- @ rod@rodmatthews.com.au
- 0411 858 153
- www.rodmatthews.com.au



**rod matthews**



**more**  
morestrategic