

The emerging spirit resurgence of mankind throughout the world demands the creation of innovative mechanisms for acquiring, financing and operating effectively the necessary facilities on a global-local level. Particularly, the demand is for additional Order and Movement residential units at Base Centrum and larger Religious Houses and training centers around the globe. Given the demands of procuring global properties, the responsibility of developing the expertise necessary by means of a Guardian Pool will be required to compete in the arena of finance and business, while maintaining a stance of being in the world, but not of it.

Ten specific recommendations concerning facilities procurement for the global Spirit Movement are as follows in order of priority::
We recommend that

- I. A PROPERTY CENTRUM BE CREATED WITH STAFF CONTINUITY.
 - a. Establish a property operations post at base centrum.
 - b. Establish a resource list of Movement people within the Regions that can offer wisdom relative to property.
 - c. Hold a P.S.U. on the relationship of future projection, development management and Order strategies relative to property acquisition and facilities operations.
 - d. Gather, update and organize the currently existing records on properties and operations.
- II. A2 MANUAL OF PERTINENT CRITERIA BE CREATED WHICH WILL INCLUDE A CHECK-OFF LIST FOR PROPERTY ACQUISITION POSSIBILITIES.
 - a. Hold a P.S.U. on the format of the manual and the specific issues that need to be raised relative to property acquisition.
 - b. Invite the Movements Guardians to the P.S.U. as primary resource.
 - c. Specific issues of concern relative to property selection are local ordinances, tax shelters and real estate financing.
 - d. Submit a semi-annual questionnaire to each Religious House to up-date the manual.
- III. THE EXISTING FACILITIES BE RESEARCHED AND A HISTORY PREPARED OF THE ACQUISITIONS
 - a. Create a form for obtaining the Order memory on the acquisition of Religious House and Base properties.
 - b. Delineate and record the tactical procedures used in obtaining the Kemper building.
 - c. Create a continental list of currently or potentially available facilities that could be used for Movement programs.
 - d. Create the system to disseminate the above data in a useable form.
- IV. A CENTRUM/GLOBAL MASTER PLAN BE DEVELOPED TO PROVIDE VISION OF THE ECUMENICAL PARISHES ACROSS THE GLOBE.
 - a. Create a real estate grid of the Uptown ecumenical parish.
 - b. Gather the data on the current ownership and tax status of the above real estate property.
 - c. Relate the existing zoning regulations and restrictions to the intended demonstration project.

- d. Establish the fundamental property criteria and physical requirements needed for any ecumenical parish throughout the globe.
- V. THE LAKESIDE PROPERTY BE ACQUIRED TO ALLOW THE KEMPER FACILITY TO BE USED PRIMARILY FOR A TRAINING CENTER.
 - a. Investigate the possibility of obtaining the Lakeside property via a land contract with a balloon note deferred to 1979/
 - b. Investigate the financial, marketing, and legal possibilities of converting the Lakeside property to a condominium.
 - c. Investigate financing deficits through movement bonds, notes, etc. held by individual movement members.
 - d. Investigate "FHA" refinancing of the Lakeside property.
- VI. A GLOBAL REAL ESTATE GUILD BE INITIATED TO RECOMMEND AND REVIEW AS A CENTRAL ADVISORY GROUP, THE PROCUREMENT AND OPERATION OF ALL FACILITIES BY MEANS OF:
 - a. An annual inventory and appraisal of properties with statistical report.
 - b. Projection and extension planning regarding proposed acquisitions
 - c. a task team to review, correlate, and analyse annual operation cost, including:
 - d. periodic publishing of signal acquisitions and anticipated needs.
- VII. THE DEVELOPMENT OF IN-KIND AND PHASE 4 SERVICES FOR THE PURPOSE OF REDUCING OPERATING COSTS PLUS PROVIDE SIGNIFICANT ENGAGEMENT FOR ELDERS, BY MEANS OF:
 - a. Professional maintenance on major equipment
 - b. an operation and maintenance manual for recommendations and maintenance records
 - c. recruiting with an intentional brochure phase four personnel with operation and maintenance experience.
 - d. seeking in-kind service.
- VIII. A GUARDIANS POOL BE INITIATED TO PROVIDE A MOVEMENT HOLDING COMPANY FOR THE PURPOSE OF CAPTURING THE MANAGEMENT EXPERTISE OF MOVEMENTAL COLLEAGUES BY MEANS OF:
 - a. Conducting a survey of guardians gifts, talents, and expertise and correlating them into a skills abstract;
 - b. the formation of a patron ownership structure;
 - c. researching a comprehensive global insurance plan.
 - d. selecting a legally enabling and imaginal name.
- IX. CONSULTATION AND ENABLEMENT STAFFS BE DEVELOPED TO OVERSEE THE FACILITIES PROCUREMENT AND MAINTENANCE LOCALLY, BY MEANS OF:
 - a. Preliminary gridding and data gathering;
 - b. Developing a real estate practicum model;
 - c. Conducting real estate practicums regionally;
 - d. Creating a comprehensive timeline.
- X. A TRAVEL AGENCY OR LIKE COPORATION BE CREATED FOR THE PURPOSE OF REALIZING PROFIT TO PURCHASE AND PROVIDE TAX SHELTERS FOR ALL REAL PROPERTY HOLDINGS OF THE MOVEMENT, BY MEANS OF:

- a. Creating the legal entity;
- b. Developing a tax shelter mechanism;
- c. Establishing the place of business;
- d. Assigning and training the management and staff.

In the past ten years the assets and income of the Ecumenical Institute and the Order have increased to such an extent in contributions, property, and securities that a whole new dimension of investment management is called for. The major contradiction has been how to provide professional management of the complex investment affairs at the Ecumenical Institute and the Order without detracting from the demand for total engagement in the mission. The missional thrust of the Institute will be furthered by a strong undergirding of its economic base through the implementation of the recommendations that follow:

- I. IT IS RECOMMENDED THAT AN INVESTMENT POLICY BOARD BE CREATED, TO INCLUDE BOTH GUARDIANS AND ORDER MEMBERS, TO OVERSEE MANAGEMENT OF ALL INVESTMENTS OF BOTH THE ECUMENICAL INSTITUTE AND THE ORDER.
 1. This policy board should be drawn from a list of qualified prospects who
 2. Have access to expertise in real estate, securities, insurance, etc. and
 3. That the Board of Directors of the Ecumenical Institute should define the responsibilities and
 4. Decide the make-up of the policy board.
- II. IT IS RECOMMENDED THAT A SEPARATE ENTITY BE ESTABLISHED TO HOLD ORDER ASSETS FOR INVESTMENT AND CAPITAL APPRECIATION.
 1. Obtain recommendation from guardian legal staff as to type of legal entity to be used.
 2. Define assets available for investment.
 3. Make proposal to the Order.
 4. The proposal to be prepared by policy board.
- III. IT IS RECOMMENDED THAT THE ECUMENICAL INSTITUTE OBTAIN THE SERVICES OF EXPERTS IN DESIGNING COMPLETE AND ECONOMICAL INSURANCE PROGRAMS.
 1. Ask order people and Guardians with contacts in insurance fields to recommend independent insurance consultants agency personnel and/or company personnel who are competent to perform this task.
 2. Investigate possible savings resulting from use of various sizes of deductibles.
 3. With a view to self-insuring an amount up to \$5,000, obtain detail of loss experience under group health plan, and estimates of cost of handling such self-insured claims.
 4. Explore savings which might result from placing all forms of insurance with one company.
- IV. IT IS RECOMMENDED THAT ANALYSIS BE MADE SHOWING THE PROJECTED GROWTH/COST OF EDUCATION FOR ORDER YOUTH FOR A 20-YEAR PERIOD.
 1. Delineating underlying presuppositions;
 2. Anticipating annual growth;
 3. Obtaining actuarial evaluation of necessary funding; and
 4. Implementing model for periodic updating of the projection.

- V. IT IS RECOMMENDED THAT POLICY GUIDELINES BE ADOPTED FOR DETERMINING AN APPROPRIATE INVESTMENT MIX.
1. Delineate present and future demands for Order and Institute funds.
 2. Identify liquidity, risk, and growth requirements for working capital, educational and order support reserves, contingency funds, and missional reserves.
 3. Assign investments according to priority of demands.
 4. Provide for periodic review.
- VI. IT IS RECOMMENDED THAT INVESTMENT STRATEGIES BE FORMULATED WHICH WILL PROMOTE THE AIMS OF THE INSTITUTE.
1. Invest in companies whose policies do not conflict with Institute aims.
 2. Consider investment in companies who have been generous with in-kind donations.
 3. Consider high interest (i.e. 1%/mo) loans to movement persons as a means of obtaining cash flow at low risk.
 4. Consider use of movement funds to finance capital expenditures for local movement activities to avoid paying interest to lending agencies.
- VII. IT IS RECOMMENDED THAT OUTSIDE ACCOUNTING SERVICES BE ACQUIRED TO CONSERVE THE TIME OF ORDER PERSONNEL PERFORMING E.I. AND ORDER FINANCIAL FUNCTIONS.
1. Define and project the accounting and investment controls for E.I. and the Order.
 2. Secure a computerized accounting service to handle investments and operating accounts. (Use in-kind donation if possible)
 3. Modify system accounting procedures to accommodate financial operating principles.
 4. Assure continuity of personnel assignments in these functions to administer and monitor the system.
- VIII. IT IS RECOMMENDED THAT A DIRECTORY OF MOVEMENT GUARDIANS AND AN INFORMATION EXCHANGE SYSTEM BE INITIATED TO MOBILIZE MOVEMENT KNOWLEDGE OF CAPITAL SOURCES AND INVESTMENT OPPORTUNITIES.
1. Design and prepare a questionnaire for use at the next Guardian meeting to survey investment contacts and expertise.
 2. Compile this data into a directory of a Movement Guardian investment contacts and expertise.
 3. Initiate a quarterly survey of Movement knowledge of investment opportunities at next Guardian meeting.
 4. Establish a central financial communications center for ongoing interchange of investment information.
- IX. IT IS RECOMMENDED THAT ADDITIONAL FUNDS BE SOLICITED FOR THE ECUMENICAL INSTITUTE FROM THE MOVEMENT AND ITS FRIENDS.
1. Solicit bequests, annuities and living trusts from the movement and its friends.
 2. Use Kemper story to develop model for real estate giving.
 3. Solicit deposits from foundations, guardians and others, with interest being donated to the Ecumenical Institute.
 4. Utilize borrowing power of guardians.

- X. IT IS RECOMMENDED THAT ONE MEMBER OF THE INVESTMENT POLICY BOARD BE DESIGNATED TO ACT AS REAL ESTATE COORDINATOR IN THE MANAGEMENT AND FINANCING OF THE ECUMENICAL INSTITUTE'S REAL ESTATE.
1. Compile central file of real estate holding and supporting records.
 2. Recommend criteria for sale of retention of property not directly used by the Institute.
 3. Formulate long-term plans for the maintenance of properties.
 4. Compile a state by state list of Guardian lawyers available for consultation with Religious House priors on real estate questions within their respective states and/or countries.

There are four areas to future projection of fiscal affairs--missional program, enabling facilities, long-range funding, and catalytic forces. The gestalted dreams for the missional program in 1983 include: a. establishment of a global research network symbolized by a research center for communication methodologies; b. establishment of edge projects throughout the globe in the form of experimental villages and replication 5th Cities; 3. retraining and retooling local churchmen; d. area centrums with symbolic continental centrums. In the area of enabling facilities, the need was seen for a global communications network, back-up training facilities, portable training centers, and a publishing house. Long-range funding will encompass a comprehensive contribution network, program income, budgeting, and responsibility auditing. Catalytic forces include movement colleagues, friends of the movement, guilds and developing and disbursing skills. The fiscal support system that will enable the above to happen includes a global consultant network to sell our expertise to the government, corporations, and the general public; global accountability control; international fiscal planning and global development. The key contradiction blocking the above accomplishments is the current unintentional and unbusiness-like style of planning and executing fiscal operations which leaves us unprepared for the massive global expansion which is upon us.

- I. IT IS RECOMMENDED THAT A BUSINESS DIVISION BE ESTABLISHED AT SYMBOLIC CENTRUM WHICH WOULD ENCOMPASS SEVERAL POSTS SUCH AS DEVELOPMENT, INVESTMENT PORTFOLIO, ACCOUNTING, DATA PROCESSING, REGIONAL FISCAL COORDINATION AND MOVEMENT SKILL AND PRODUCT MARKETING.
 1. Hold a weekend P.S.U. of expert guardians and appropriate Order staff to build a functional task model delineating the various jobs.
 2. Develop a continuing development/business division of experienced guardians to work with the appropriate Order staff.
 3. Build an organizational model and an 18-month PERT plan to establish this division.
 4. Analyze and establish allowable costs relative to other missional demands.
- II. IT IS RECOMMENDED THAT A PROGRAM BE ESTABLISHED TO INSURE THAT MOVEMENT DEVELOPMENT EFFORTS ARE NOT ONLY COMPREHENSIVE BUT ALSO INTEGRATED ONE WITH ANOTHER.
 1. Hold a weekend P.S.U. of guardians and appropriate Order staff to brainstorm the problem and come up with a comprehensive plan.
 2. Have various movement groups submit their 10-year projections.
 3. Perform an evaluation of costs and income sources from the global to the local levels in order to establish the direction of present day efforts.
 4. Use the regional Development Practicums where appropriate.
 5. Apply DELPHI method to explode above projections.
- III. IT IS RECOMMENDED THAT THE MOVEMENT BECOME MORE CONSCIOUS OF THE EFFECT OF ITS IMAGE ON THE GENERAL PUBLIC, ESTABLISHED CHURCH, AND COURSE GRADS AND DILIGENTLY PURSUE THE CULTIVATION OF THE IMAGE OF GOOD FAITH ON ALL LEVELS.

1. Use Fall '72 Guardians' recommendations for updating the Movement and Ecumenical Institute's image and objectives.
 2. Build a questionnaire for movement colleagues in order to gather the existing and needed public image information in the key areas where development and support is needed, i.e. denominations, business, government agencies, grads, etc.
 3. Continue P.S.U. on public image by movement Guardians.
 4. Prepare imaginal annual fiscal reports and projections.
 5. Stress high quality development material specifically aimed at major funding resources.
 6. Establish guidelines for movement relations with various funding and support areas with special emphasis on cultural differences.
- IV. IT IS RECOMMENDED THAT WEEKEND "FISCAL SYSTEM" SEMINARS BE IMPLEMENTED IN EACH GRID AREA TO CLARIFY AND PROBLEMAT FISCAL RESPONSIBILITIES OF THE AREA AND REGIONS.
1. Develop a rationale and construct for seminars.
 2. Timeline initial seminars relative to prioritized requirements of area.
 3. Create and produce necessary materials.
 4. Create and implement workshop for seminar leadership.
 5. Assign Guardians and colleagues in a specific grid area to carry out the required implementation of the seminar.
- V. IT IS RECOMMENDED THAT A GROUP OF GUARDIANS AND ORDER MEMBERS BE CONVENED IN SPRING '73 TO DRAW TOGETHER DATA FROM PRACTICUMS AND OTHER DEVELOPMENT RECORDS IN ORDER TO BUILD A LONG-RANGE MOVEMENT AIDE FISCAL MODEL AT S'74.
1. Assign five guardians to catalyze formation of the appropriate group to ensure that long-range fiscal research and planning take place in S'74.
 2. Articulate the compelling rationale for such planning in order to be prepared to meet the movement's funding requirements for area 5th Cities, LENS courses, guild formulation, demonstration ecumenical parishes, religious house expansion, Local Church expansion, area training centers and a general staff shcool over the next 10-year period.
- VI. IT IS RECOMMENDED THAT A FIVE-YEAR FISCAL OPERATING PLAN BE CONSTRUCTED TO SYMBOLIZE THE MISSIONAL IMPACT OF OUR ECONOMIC POWER.
1. Establish at S'73 a forty-man team which would build a translating screen to chart program expenditure arenas from existing data at all levels, global and local.
 2. Evaluate and optimize the existing financial principals as reflected in present data.
 3. Build operating guidelines.
 4. Timeline expenditures.

VII. IT IS RECOMMENDED THAT IN RESPONSE TO THE ANTICIPATED NEW CIVIL RELATIONS STRUCTURE AND MISSIONAL DEMANDS THAT AN OFFICE OF VISION AND RESPONSE BE CREATED. THIS OFFICE WOULD MEET QUARTERLY AND IN CONJUNCTION WITH A VISION AND RESPONSE POST AND GUARDIAN ADVISORY COUNCILS TO CREATE, AUDIT, AND ANNUALLY UPDATE A FIVE-YEAR PLAN. THE PLAN WOULD HOLD THE OPERATIONAL GUIDELINES AND FISCAL OPERATIONAL BUDGETS FOR THE TOTAL MOVEMENT.

1. The data for the plan would be drawn from the business division in recommendation number one and all local units.
2. The first step would be to choose the composition of the office of vision and response.
3. An implication of this proposal would be the creation of a guardian "board of directors" that would guard the fiscal affairs of the movement.

VIII. IT IS RECOMMENDED THAT WE ESTABLISH A HUMAN RESOURCES DATA BANK CONTAINING NAMES OF ALL MOVEMENT COLLEAGUES AND FRIENDS SHOWING THEIR SPECIAL SKILLS, POLITICAL AND SOCIAL POSITIONS AND MOVEMENT RELATIONSHIPS.

1. A task force of five Guardians shall catalyze formation and maintenance of the movement Data Bank at the Symbolic Centrum Data Center.
2. Special PSU's will be called to research methods (e.g. Lutheran and Presbyterian models), to obtain computer facilities (computing time, software development, etc.) as in-kind donation where possible, to establish computer program specifications and to devise operating procedures.
3. The procedures would ensure initial cataloguing and verification of presently available data, continuous updating of information and rapid, reliable, confidential access for movement requirements.
4. These latter are to be accomplished by an initial survey of present colleagues and friends, by automatic procedures to use all sources of movement information (e.g. from course participation, attendance at movement gatherings, and individual notes).
5. High speed data transmission and print out facilities should be available to regional Religious Houses (through donation of time on private business facilities and linkages where possible).

IX. IT IS RECOMMENDED THAT A FORMAL GUARDIAN-SABBATICAL PROGRAM BE INITIATED THAT WOULD GIVE BUSINESS PERSONS AND PROFESSIONALS AND SPOUSES THE OPPORTUNITY TO SPEND TIME AS AN INTERN (OR SOJOURNER).

1. Conduct PSU to establish program guidelines and procedures including their salary going to the movement during their time in sojourn.
2. Initiate a promotional program for the movement at large and the general public.
3. Focus initial exposure toward LENS graduates.
4. Direct this program toward the sociological academies of the 1990's.
5. Utilize background skills of guardian interns for movement tasks.

6. Survey business policies regarding social service leave of absence programs.
- X. IT IS RECOMMENDED THAT A COMPREHENSIVE SET OF REVOLUTIONARY FISCAL PRINCIPLES BE INCORPORATED INTO A SET OF LECTURES AND TRAINING CONSULTS TO BE USED TO ORIENT MOVEMENT PERSONNEL IN DEVELOPMENT PROCESS AND FISCAL MANAGEMENT.
 1. Conduct a PSU involving financially expert guardians and experienced symbolic centrum members to outline these principles.
 2. Use regional practicums to develop lectures and training consults from these principles.
 3. Maintain the vision and zeal in the grassroots.

Growth of movemental activities over the globe has been at an exponential rate in recent years. This growth has outstripped current development strategies with respect to providing the kind of funding needed, raising to consciousness the demand for broad-based, on-going, well-organized economic support for such activities. Development heretofore has been performed on a "crisis-oriented" basis by centrum colleagues who specialize in fund raising. It is therefore necessary to enable regional colleagues to image development as that without which the mission is unattainable and begin to assume increased responsibility for planning, organizing and implementing a futuristic, intensive and on-going development effort.

- I. IT IS RECOMMENDED THAT THE ROLE OF THE CENTRUM DEVELOPMENT OFFICE BE SHIFTED TO LONG RANGE VISIONING OF GLOBAL NEEDS, THAT IT PERFORM CENTRAL DATA COLLECTION AND DISBURSEMENT ON BEHALF OF THE REGIONAL/ AREA AND IT PROVIDE FOLLOW-UP COMMUNICATION IN TERMS OF GLOBAL NEWS TO ALL CONTRIBUTORS.
 1. Set four-year global budget.
 2. Centrum to provide quarterly grad/donor print out to regional development coordinator.
 3. Region supplies centrum with complete donor list.
 4. Develop journey rationale for regular/potential donor mailings.
- II. IT IS RECOMMENDED THAT RESPONSIBILITY FOR REGIONAL DEVELOPMENT ACTIVITIES BE ASSIGNED TO A REGIONAL DEVELOPMENT CO-ORDINATOR.
 1. Brainstorm list of colleagues who are potential Regional Development Co-ordinators.
 2. Concerned Guardians.
 3. Making selected colleague an "offer he cannot refuse".
 4. Design offer, arrange nurture for Regional Development Coordinator.
- III. IT IS RECOMMENDED THAT A DEVELOPMENT MODEL BE MADE PART OF EACH AREA'S AND REGION'S TOTAL MISSIONAL PROGRAM; AND THAT PENETRATION CALLERS ATTEND A DEVELOPMENT PRACTICUM SINCE SUCCESSFUL PENETRATION IS VERY "KEY" TO FISCAL DEVELOPMENT.
 1. Review current missional model.
 2. Determine financial requirements for the Region, etc.
 3. Integrate Development Program into missional goals.
 4. Identify and analyze sources of revenue.
- IV. IT IS RECOMMENDED THAT IN ORDER THAT FUND RAISING BE IMAGED AS AN ON-GOING LONG-RANGE PROGRAM, AN ANNUAL FUND-RAISING CALL BE MADE ON EACH PROSPECT TO OBTAIN A SIGNIFICANT PLEDGE.

1. Compile list of regional donors, date last called on and response.
 2. Regional Development Coordinator, et. al.
 3. Involving colleagues in training events.
 4. Schedule development calls throughout the year; design pledge cards; organize thank yous and follow-up; coordinate with penetration and formulation efforts in region; set up record system; design development kits.
- V. IT IS RECOMMENDED THAT EACH REGION CREATE A DEVELOPMENT NETWORK WITH AT LEAST ONE PERSON IN EACH METRO RESPONSIBLE FOR THE DEVELOPMENT EFFORT IN THAT METRO.
1. Each metro assigns a development coordinator.
 2. Arrange for joint meeting between Development Centrum and Metro Development Coordinators.
 3. Develop regional development model.
 4. Present development model to regional council for consensus.
- VI. IT IS RECOMMENDED THAT DEVELOPMENT TRAINING EVENTS BE HELD REGULARLY ON THE REGIONAL LEVEL.
1. Schedule training event in conjunction with regional practicum.
 2. Regional Development Coordinator.
 3. Enable participation of key potential development callers.
 4. Role-playing training; link trained and untrained callers; tell miracle stories; publish dates of events on regional calendar; set up appointments.
- VII. IT IS RECOMMENDED THAT THE REGIONAL DEVELOPMENT AND DEVELOPMENT CENTRUM ESTABLISH A COMMON ACCOUNTABILITY AND PLEDGE ACKNOWLEDGMENT PROCEDURE.
1. Common accountability model between regional development coordinator and centrum.
 2. Year end victory celebration at Regional Council.
 3. Set up regional card file.
- VIII. IT IS RECOMMENDED THAT LOCAL CADRES ADOPT A COMPREHENSIVE FUNDING PLAN WHEREBY CONTRIBUTIONS ARE SENT OUT FOR GLOBAL PURPOSES, AND LOCAL NEEDS ARE FINANCED FROM REVENUE DERIVED FROM COURSES, THUS UNDERSCORING THE INDICATIVE OF INTENSIVE PENETRATION.
1. Arrange for concerned guardian to meet with each cadre in region and explain plan.
 2. Regional Development Coordinator and colleagues.
 3. Build a comprehensive presentation complete with miracle stories and figures, which outlines how local financial needs can be met using intensified penetration.
 4. Establish timeline showing "cutover"; involve penetration colleagues; short courses for local colleagues relative to global needs.

- IX. IT IS RECOMMENDED THAT ENDORSEMENTS AND AUTHORIZATIONS BE SOUGHT FROM LOCAL CIVIC AND ECCLESIASTICAL LEADERS FOR USE IN PUBLISHED MATERIALS AND IN DEVELOPMENT PITCHES.
1. List leaders from whom endorsements will be sought.
 2. Regional Development Coordinator, et. al.
 3. Recruit selected leaders to LENS or RS-I.
 4. Coordinate with penetration; get lists from Chambers of Commerce and church groups; make development call shortly after prospect's participation in event; get data from pedagogues.
- X. IT IS RECOMMENDED THAT LOCAL MAN BE ENABLED TO SEE THE MOVEMENTAL GLOBAL STORY OF POSSIBILITY THROUGH THE USE OF IMAGINAL AIDS.
1. Establish speakers' bureau.
 2. Develop story presentations on cassettes.
 3. Create color slide presentations of demonstration projects and global trips.
 4. Film the 5th City Demonstration Project.

One of the key concerns in developing on-going movement financial support from a broad base of interests is the expansion of a patrons network for each region. Patron support is imaged as significant donations from non-movemental individual sources. In the past significant efforts in this area have been blocked by seeing patron participation in traditional giving terms, where charity is the primary giving image. In order to release ourselves in this area, we must reimage patron giving not as charity, but as expending resources locally to further the global humanizing process. This reimagining will take place through implementation of the recommendations and their associated tactics. As a result of the actualization of these tactics a self-conscious decision relative to taking a relationship to the patron will allow an intensified thrust into the arena of patron support of the Global Spirit Movement.

- I. SHARE WITH COLLEAGUES MIRACLE STORIES CONCERNING STRATEGIES THAT ENABLED SUCCESSFUL PATRON DEVELOPMENT CALLS.
1. Colleague making call execute document.
 2. File locally.
 3. Mail copy to base.
 4. Centrum incorporate these stories in monthly newsletter to Regional/Metro Development Coordinator.
- II. SPIN MIRACLE STORIES THAT ALLOW PATRONS TO SEE GLOBALITY AND COMPREHENSIVENESS OF MOVEMENT.
1. Assign Research Station to compile data that hold miracle stories.
 2. Assign Development Centrum to disseminate data to region.
 3. Establish timeline for compilation and dissemination of current data.

4. Workshop to adapt to local conditions.
- III. ESTABLISH STRUCTURES IN REGION/METRO/POLIS FOR WORKSHOPS PROVIDING COLLEAGUES WITH STORY AND STYLE THAT WILL IMPACT LOCAL PATRONS.
 1. Get workshop on quarterly timeline.
 2. Presidium coordinator assign workshop.
 3. Development coordinator structure workshop.
 4. Development coordinator responsible for getting key people into workshop.
 - IV. STRATEGIC PENETRATION OF SOCIAL STRUCTURES FOR IDENTIFICATION AND INITIAL CONTACT OF PATRONS.
 1. Compile directory of social structures.
 2. Guardians assume responsibility.
 3. Regional Guardians meeting quarterly.
 4. Brainstorm what groups should be penetrated.
 - V. ONE-YEAR AND FIVE-YEAR BATTLEPLANS TO INSURE THAT TRAINING, PENETRATION STORY DEVELOPMENT AND DECOR RATIONALE ARE PULLED TOGETHER IN A COORDINATED AND COMPREHENSIVE PROGRAM.
 1. Coordinate with other development plans.
 2. Regional Development Coordinator will coordinate.
 3. Include in Regional Presidium Agenda.
 4. Pull out existing data and make five year projection.
 - VI. DESIGN DECOR WHICH HOLDS THE LOCAL FOR THE SAKE OF THE GLOBE IMAGE BEFORE COLLEAGUES AND PROSPECTIVE PATRONS.
 1. Procure hourglass symbols.
 2. Regional Development Coordinator and...
 3. Metro Development Coordinator suggest modification of basic symbol to reflect local culture.
 4. Regional Council implements development decor.
 - VII. WE RECOMMEND THAT STRUCTURES BE CREATED WHICH HONOR PATRONS AND PROVIDE REGULAR RECOGNITION FOR SIGNIFICANT SUPPORT.
 1. Design format for Global categories of giving.
 2. Chicago Development Centrum assigned to design format.
 3. Chicago Development Centrum furnish regions with format.
 - VIII. WE RECOMMEND THAT A PATRON PROCUREMENT PLAN BE BUILT AND IMPLEMENTED WHICH INCLUDES PATRON LOCATING RESOURCES, A STRATEGIC PATRON CONTACT MODEL, DETAILED METHODS WHICH IMPACT THE PATRON AND FINALLY A MODEL FOR OBTAINING THE GIFT.
 1. Locate patrons.
 2. Contact Model for patron call.
 3. Impact patron.
 4. Secure gift from patron.

Fourth Guardian Consult
April 13-15, 1973

SECTOR II ECONOMIC DEVELOPMENT

Ecumenical Institute
Spring Quarter 1973

TEAM D DEVELOPMENT PRACTICUM		TEAM E CAPITAL FUNDING		TEAM F IN-KIND INTENSIFICATION	
UNIT 7	A Ray Caruso Ken Knowlton Frances Stagner Lee Sugg	UNIT 9	A Ben Ball Beret Hanson Len Hockley Steve Laxdal	UNIT 11	A Bill Schrempf James McBurnev John Miesen Sandy Rafos
	B Rusty Richards Bob Ault Arlin Raedeke Janice Westlund		B Stan Crow Earl Good Fred Haman Roy Smith		B Tom Whitsett Kathy Convey Ralph Tippet David Zahrt
UNIT 8	A Bill Goodger Wayne Stracener Al Ward Irwin Wason	UNIT 10	A Ford Nielsen Jim Fenton Marian Hamje David Swoap	UNIT 12	A Oscar Sperstad Russ Asay Howard Burroughs Betty Pesek
	B Harry Kuehn Jim Oberg Bob Reid Howard Riley		B Jim Mohn Robert Battershell Georgianna McBurney Pat Moriarty		B Paul Evans Carl Johnson Dick Talbot Bob Wiley

TEAM D

First Paragraph:

--related dimension of formulation and symbolic breakloose.

DEVELOPMENT
PRACTICUM

I:--accountability, prodding role of centrum in relation to regions

--Centrum: vessel where accumulated knowledge is held (because region has less continuity than base).

II. questions directly answered.

III. 2--"etc." indicates Area, metro.

IV. 2--others involved--possible network

V.--integrate with regional activities

--RDC key to getting metro people set up.

VIII.--symbol of development -- you only pledge to Global Spirit Movement.

--anything else is under the table.

--change word "contributions" to "pledges" (second line in recommendation)

IX.--Go carefully! -- especially with ecclesiastical leaders.

Confidence about:

--work on 2 & 5--

RDC needs nurture--needs to organize metro coordinators.

Implement tomorrow: 2

Not precise enough: 2 (clarify role)

Step 3 under 5 (tension)

Step 2 under 5 (and RDC)

7 & 4 closely related. Merge.

Patron

VII. Needs further clarification re categories of giving

VI. Number 2 needs clarification

Missing one --- follow up

Entire group needs to hear about:

a. Complete decentralization of development from Centrum to Region.

b. Development in and of itself is nothing--development is penetration tool.

c. Guardian has particular role (patron section)

Guardian as key to development (contact to penetrate social structures).

- d. Patron downbeat on cultural.
- e. Key insight in patron--
shift from giving to charity to investing in future.

Most startling thing:

- development not just money procurement
- development, that without which mission unattainable.

TEAM E

- I. Delete all words following "prepared".

- II. Needs more concretion.

CAPITAL
FUNDING

- III. This should be referred to legal council relative to control of the use of the name and the creating of new names. Decision as to what the name is to be needs to be made--the implications of an alternate name are crucial.

This was considered because of the difficulty encountered in obtaining funding for religious organizations, however this difficulty needs to be balanced by our name indicating what we are about. A realistic alternative is the use of subdivision names, e.g. Institute of Cultural Affairs.

I. will be guided by decision made in this regard.

- IV. # 3 is the significant shift here.

- V. In the specific corporation document, combine the donor's logo with an E.I. symbol.

- VI. Data gathering check list prepared by Centrum.

- VII. Mailings need to be selective:
categories need to be creative.

- VIII. Need to reflect in this document how little is spent on staff.

- IX. This is a Centrum activity.

We noted that the naming of names and the assigning of tasks was necessary for recommendations to be really serious.

TEAM F

INKIND
INTENSIFICATION

To be a guardian infers responsibility that is a decisional stance. That is the difference between floundering and being affective. A new consciousness must be developed in which one views all contacts as being potential donors. Our missional story which includes miracles of past and present is adequate for secular and religious men. It is crucial that a regional development nucleus be created, i.e. "Iron men beget Iron men." To be effective, tactics must be prioritized with a time line generated.

To equip the Demonstration Signs and Servant Forces of the Spirit Movement, the Movement Guardians have decided to enable an intensification of In-Kind giving. In the first instance, this task is aimed at securing the essential goods without which the mission's thrust is blunted. But undergirding that aim is the decision to release members of the business and professional communities to reimagine themselves as servants and act out a global vision of humanness. An In-Kind contribution is a representational act which invests the labors of many into a new future for all. The Guardians will catalyze many localized strategies of In-Kind contacts and develop a consensus among regional colleagues to take part in them. At the same time, Centrum will provide the Guardians with training resources, up-to-date data and concrete proposals which focus their efforts.

- I. IT IS RECOMMENDED THAT THE GUARDIANS ASSUME RESPONSIBILITY FOR IN-KIND DEVELOPMENT BY EXPANDING THEIR OWN TRAINING, NURTURING PERSONAL CONTACTS, STRATEGICALLY CULTIVATING THE ESTABLISHMENT, AND SETTING UP ACCOUNTABILITY/ABSOLUTION STRUCTURES.
 1. Participate in development practicums.
 2. Establish fertilization model for personal contacts.
 3. Use personal contacts to establish inroads into areas where they are lacking.
 4. Create a regional development nucleus which periodically accounts for their activities by sharing the results with Action Centrum or an appropriate body.
- II. REGULAR IN-KIND STRATEGY SESSIONS BE HELD FOR GUARDIANS, REGIONAL GALACTIC AND RELIGIOUS HOUSE COLLEAGUES BEGINNING WITH KEMPER RENOVATION NEEDS.
 1. Have a Regional PSU on Sources and Forces for Kemper In-Kind
 2. Create a comprehensive Kemper Renovation list to be secured by Regions
 3. Match Regional sources and forces with Kemper renovation needs
 4. Mobilize a Kemper-renovation-by-Summer-'73 blitz
- III. IT IS RECOMMENDED THAT COMPREHENSIVE CONSTRUCTS AND STORY BE DEVELOPED CREATING AN IMAGE OF THE DONOR INVESTING IN THE FUTURE OF THE GLOBE.
 1. Have printed materials telling story of global demonstration projects
 2. Compile a list of gifts and donors in past years
 3. Furnish miracle stories of recent In-Kind contributions
 4. Develop adaptations of story for different groups such as conservative, liberal, radical, secular.
 5. Develop credentials and references for callers.
- IV. IT IS RECOMMENDED THAT AN IN-KIND DONOR RECRUITING SYSTEM BE DEVELOPED INCLUDING DONOR DOSSIER, AND A TRAINING PACKET FOR USE BY THE CALLERS.
 1. Create necessary forms such as call reports, prospect analysis, timeline structures and follow ups
 2. Develop and distribute data needed by callers.
 3. Utilize war board for operations control
 4. Establish a reporting system

- V. IT IS RECOMMENDED THAT CURRENT AND FUTURIC NEEDS BE CATEGORIZED ACCORDING TO RECURRING (CONSUMED IN 1-YEAR), OCCASIONAL (1-5 YEARS), AND ONE-TIME NEEDS ORDER TO FACILITATE DONOR APPROACHES.
1. Enumerate recurring needs (e.g., commercial transportation, paper, food, utilities, cleaning supplies, etc.)
 2. Enumerate occasional needs (e.g., automobiles, bedding, office machines, appliances, etc.)
 3. Enumerate one-time needs (e.g. furniture, construction materials, labor for construction projects, etc.)
 4. Within each category, establish priorities based on the relative cost of the item to the total expenditure in that project or operations area.
- VI. WE RECOMMEND THAT CENTRUM ESTABLISH AND MAINTAIN A CURRENT IN-KIND REQUIREMENTS FILE WHICH COMPREHENSIVELY DESCRIBES PRESENT AND PROJECTED NEEDS FOR GOODS AND SERVICES.
1. Create a reporting system through which Order stations can notify Development Centrum of current and projected needs.
 2. Establish periodic reviews to purge or revise file information.
 3. Evaluate manual and mechanized file systems and determine most economic system for estimated file size.
 4. Develop techniques for assigning priorities to each item within the file so that crucial items can be identified easily.
 5. Regularly (monthly) notify Guardians of priority needs.
- VII. WE RECOMMEND DEVELOPMENT OF RESOURCE FILES AND ACQUISITION OF REFERENCE MATERIALS WHICH RELATE POTENTIAL AND PREVIOUS DONORS TO IN-KIND NEEDS.
1. Develop data on Guardian contacts including industry, occupation, memberships, etc.
 2. Obtain reference materials like Thomas Register, SIC codes, industrial association indexes, etc. (preferably as In-Kind).
 3. Using priority needs and previous donor information, identify key companies or industries for contact.
 4. Through Guardian data, identify Guardian who can best aid the In-Kind station in making contacts for each need.
 5. Include generation of contact possibilities at each regional practicum to expand data files.
- VIII. WE RECOMMEND THAT GROUPINGS OF ANTICIPATED PROGRAMATIC NEEDS FOR EVERY AREA IN THE GLOBAL MOVEMENT, BE PREPARED TO BE USED FOR PROPOSALS IN COMPREHENSIVE IN-KIND CONTRIBUTIONS.
1. Choose the futuric groupings by a Centrum PSU.
 2. Itemize specific needs in each grouping by a Centrum PSU.
 3. Write up Summer '73 as a sample proposal to be tested immediately by Centrum PSU.
 4. Contact Guardians a pilot experiment of In-Kind proposal work and secure needs for Summer '73.

- IX. IT IS RECOMMENDED THAT DONORS RECEIVE A PERSONAL ACKNOWLEDGEMENT INDICATING THE USE OF HIS DONATION AND OFFERING SUGGESTIONS FOR CONTRIBUTIONS FOR OTHER GLOBAL PROGRAMS.
1. Acknowledgement model be developed.
 2. Current In-Kind needs list be incorporated into acknowledgement format.
 3. Program an appropriate lag time for acknowledgement and for periodic contact with donors.
 4. Original contact person should handle acknowledgment.
- X. IT IS RECOMMENDED THAT ADDITIONAL IN-KIND PLANNING BE DONE. THIS PLANNING SHOULD INCLUDE:
1. Order PSU session on storage of large or perishable gifts.
 2. Order PSU session on transportation and distribution of gifts received.
 3. Determine regional as well as Centrum needs.
 4. Determine the practical relationship and channels of communication.

The following recommendations are concerned with how the Religious House members can support themselves outside the continental U.S.A. A variety of approaches are recommended to facilitate this support which included: job procurement, self generating services, saleable programs, and marketable E.I. methods and knowledge. The primary criteria in establishing the order of priority was selecting that activities that had the most practical value while least diverting the mission. Our concern was how to make the most money with the least expenditure of time, and where possible to be paid while doing the mission. To be genuinely revolutionary the movement must be able to support itself where it is or else fall prey to strings of a "Landlord" far away.

- I. IT IS RECOMMENDED THAT DATA CONCERNING OVERSEAS EMPLOYMENT OPPORTUNITIES AND THE JOB SKILL WITHIN THE MOVEMENT BE COLLECTED AND SYSTEMATIZED IN ORDER TO PROVIDE FOR A MATCHING OF PEOPLE WITH JOBS AND BREAK THROUGH TO THE BROADEST POSSIBLE OVERSEAS SUPPORT
 1. Order Centrum should first of all assess the job market overseas. They would talk to U.S. government agencies, such as the state department, and to international companies.
 2. They could make surveys, such as an I.E. questionnaire in which movement contacts could give information and known contacts relating to overseas jobs. A questionnaire to all overseas regions would elicit job opportunities, skills requirements, and salaries.
 3. The order should compile a list of periodicals that advertise overseas jobs.
 4. Next, the order should complete the catalogueing of the skills of people in the order.
 5. This step, the key to the employment breakthrough, would involve systematic matching of people and jobs.
 6. Finally, recommendations can be made to movement people when training is needed to fill out skills/knowledges/ certification.
- II. IT IS RECOMMENDED THAT A BUSINESS BE ESTABLISHED, OFFERING THE SERVICE OF TEACHING ENGLISH TO FOREIGN NATIONALS AND OFFERING INSTRUCTION IN HOST COUNTRY LANGUAGE.
 1. Contact groups and individuals that could use English or other tutoring
 2. Who would do this: Persons assigned from the order and movement to represent the public relations department of this business would make the contact.
 3. Key implementation step: Writing a public relations story that indicates who and how the tutoring service might be used, who would be tutoring and why they are qualified.
 4. Key strategies and tactics. Who, how, where, when
 - Necessary legal steps
 - List of people who could serve in tutoring capacity
 - Locate places where tutoring would take place
 - Formulating continuous customers market survey to establish competitive prices.

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- III. IT IS RECOMMENDED THAT WHEN APPROPRIATE, RELIGIOUS HOUSES OUTSIDE NORTH AMERICA ENCOURAGE COLLEAGUES AND MOVEMENT FRIENDS PAY TO USE THE ACCOMMODATIONS OF THE RELIGIOUS HOUSE AS A WAYSIDE INN OR FOR A MORE EXTENDED SOJOURNER.
1. Spread the word across the movement that traveling business men on an expense account could stay at a Religious House and pay for this accommodation
 2. Encourage missional discontinuity whereby families might pay in order to sojourn at a House on another continent.
 3. A cost model established and distributed across the Movement.
 4. Guardians spread this word in their own region and among their own missionally informed associates.
 5. Religious House build a plan for maximising the impact in their own area.
 6. Plan of services available; eg. room, board, baby sitting.
 7. Houses provide appropriately decorated guest rooms.
- IV. IT IS RECOMMENDED THAT A BUSINESS BE ESTABLISHED TO MARKET OUR PRACTICAL RESEARCH CAPABILITIES WITH CROSS-CULTURAL TEACHING METHODOLOGIES AND TO EXPLORE OTHER OPPORTUNITIES TO MARKET E.I. RESEARCH TALENTS.
1. A group such as the guardians should develop a manual laying out guidelines for providing the above services. (This would include services models, marketing techniques, and price recommendations.)
 2. Key strategies and tactics to be implemented at the local level would include the following:
 - a. develop a specialized research cadre for performing the above activities
 - b. designate research space and time at the religious house for these activities
 - c. establish a communications system with a movement-wide research network
 - d. maintain a research library of projects performed locally and in other areas.
 - e. solicit the educational and business communities through chambers of commerce, government agencies, etc. for research contracts.
- V. IT IS RECOMMENDED THAT MOVEMENT COLLEAGUES PROVIDE A SHORT TERM CULTURAL IMMERSION COURSE WHICH INCLUDES ELEMENTS OF THE PRESENT MOVEMENT PROGRAM AND IS DESIGNED TO PROVIDE AN INDIVIDUAL ARRIVING IN A NEW LOCATION WITH AN IMMEDIATE GRASP OF HIS NEW CULTURAL CONTEXT.
1. Marketing the course.
 1. Feasibility study. Estimate potential demand for the service.
 1. Contact agencies processing incoming personnel for numbers
 2. On basis of market, develop alternative ways to market course, costs.
 1. direct agency contacts or,
 2. open advertising
 2. If feasible, plan course

2. Developing the course
 1. List essential ways in which host culture differs from home culture
 2. List key methodologies from movement courses to be used in the course
 3. List local visits essential to course
 4. Develop course content in detail, sequence
 5. Estimate personnel required and costs

VI. IT IS RECOMMENDED THAT A MODEL BE FORMULATED FOR MARKETING LOCAL COTTAGE SKILLS AND PRODUCTS BOTH IN THE HOST COUNTRY ON A RETAIL LEVEL AND IN INTERNATIONAL IMPORT-EXPORT MARKETS ON A WHOLESALE OR BUYER-REPRESENTATIVE LEVEL.

1. Members and friends of the local Religious House should survey available handicraft skill, identify interesting items, and locate existing and possible new or expanded sources of supply
2. Members and friends of the local Religious House should analyze the existing market structure (indigenous buyers, sellers, and middle men) to determine points of possible disruption of or conflict with the working of the existing local economy.
3. Members and friends of the local Religious House should seek retail outlets in the host country not already covered by existing indigenous suppliers of likely items.
4. Guardians or other friends of E.I. in the major market cities of the U.S. and other countries should survey importers in search for (a) possible wholesale outlets, or (b) contact buying arrangements with the overseas religious houses.

VII. IT IS RECOMMENDED THAT A NETWORK OF SPIRIT COLLEAGUES WITH MULTINATIONAL SKILLS BE FORMED AND PROVIDE MARKETABLE TRANSLATION SERVICES.

1. Identify resource skill
2. PSU on customer identification
3. Obtain access/customer/pitch/brochures
4. Establish operating structure within local legal framework

VIII. IT IS RECOMMENDED THAT EMPLOYMENT BE SOUGHT WITH MULTI-NATIONAL FIRMS THAT OFFER POSITIONS WITH INTERNATIONAL MOBILITY

1. Locate firms with questionnaire. Send to Religious Houses/ Guardians RS I Grads/ Prospective Industries(research survey)
2. Locate firms by talking with or visiting State Dept./U.N./ A.I.D./ WorldBank/ Military/Stock Brokers
3. Write resume's---include previous overseas experience/ E.I. methods experience (appropriately described)/guardians as references
4. Create a powerful Missional Story

IX. IT IS RECOMMENDED THAT WE FIND WAYS TO MARKET METHODS OF COMMUNITY REFORMULATION.

1. PSU on needed community services and organizations concerned
2. Take identified program to most interested agency with offer of solution

3. Operating price should be locally competitive
4. Establish contractual protection of materials

X. IT IS RECOMMENDED THAT WE ESTABLISH A SERVICE OF PROVIDING GLOBAL AND AREA ODYSSEYS.'

1. Develop formats or constructs of possible "Itineraries" based on movement regions or religious house locations--done by local houses.
2. Local religious houses should brainstorm to determine "out of the way" tourist attractions in their locale possible and to develop promotion methodologies (eg. one day tours in exchange for "space available" on airlines)
3. Develop appropriate marketing contacts (local and international) eg. travel agencies, transportation resources, national tourist promotion bureaus, etc.

Four procedures to aid international development of the movement are:
1) creating a global operations network; 2) marketing cultural and educational services of the movement; 3) recruiting and maintaining indigenous guardians, and 4) defining the global style of the guardians. These procedures increase mobility of movement personnel and resources, intensify the common global outlook, and provide a helpful image to the secular world of fiscal responsibility and stability.

- I. IT IS RECOMMENDED THAT THE GUARDIANS ESTABLISH A GLOBAL DEVELOPMENT MODEL TO ENABLE THE ECONOMIC SUPPORT OF THE MOVEMENT IN A COMMON CONTEXT.
 1. A Donors' Manual including various gift possibilities, tax exemptions, and available matching grants would be produced.
 2. A Development Practicum would be held in the field.
 3. A network for donor follow-up would be maintained with a data file on all donors.
 4. Practicum Follow-up would allow movement experience in this crucial arena to be shared and so maintain the common thrust of the movement.
- II. IT IS RECOMMENDED THAT THE GUARDIANS EMBRACE THE INDIGENOUS LANGUAGE AND CULTURE SO AS TO OVERCOME THE UGLY AMERICAN IMAGE AND GAIN ACCESS TO THE ESTABLISHMENT STRUCTURES.
 1. Take language and cultural courses given by movement people (mini courses for a short stay and expanded courses for a longer term business or priorship assignment).
 2. Choose culturally acceptable clothes and symbolic ornamentation consistent with that personal and global mission.
 3. Engage in local service organizations related to the task of developing funds.
 4. Involve yourself in indigenous social circles as a way to make contacts and cultivate possible donors.
- III. IT IS RECOMMENDED THAT INDIGENOUS GUARDIANS BE RECRUITED AND FORMULATED FOR THE PURPOSE OF CREATING A NETWORK OF SECULAR RESPONSIBILITY OVERSEAS.
 1. Establish contacts with service organizations, churches, educational institutions and within the business community.
 2. Train through movemental courses and ITI.
 3. Hold a Development Practicum to contextualize need for responsible secular men to act as support system for the movement.
 4. Nurture through participation in common life of the movement as well as quarterly guardian consults.
- IV. ESTABLISH A GLOBAL MOVEMENT COMMUNICATIONS NETWORK BY WHICH INFORMATION AND DATA CAN BE QUICKLY AND EFFICIENTLY COLLECTED AND DISEMINATED.

1. Select strategic international locations for short-wave radio transmission equipment for direct communication to symbolic centrum. This system to provide the capability of a movement information system. Provide a direct system for the relaying and feedback of routing information flow between reporting points.
 2. Develop a training program for certification of operators and a communications procedures manual.
 3. Implement a commercial data-link for digital input and output. (Computer with remote access terminals).
 4. Utilize micro-film techniques for storage, retrieval, and re-duplication of data for better space utilization and easy transport over long distances.
- V. IT IS RECOMMENDED THAT A GLOBAL SYSTEM OF MONEY MANAGEMENT BE ESTABLISHED, WHICH IS COORDINATED BY DESIGNATED COLLEAGUES ON THE CONTINENTAL (AND PERHAPS AREA) LEVEL AND GLOBALLY AT CENTRUM, FOR THE PURPOSE OF FACILITATING THE INTERSTATE TRANSFER OF MOVEMENT FUNDS.
1. Establish a training program for money managers.
 2. Develop the operating procedures and techniques to be applied.
 3. Identify the country, areal, continental and global depositories of movement funds.
 4. Establish a common accounting reporting and communications system for the money managers.
- VI. IT IS RECOMMENDED THAT THE GUARDIANS DEVELOP COMPREHENSIVE SPECIFICATIONS OF MATERIALS, SERVICES, AND RESOURCES TO BE OFFERED BY THE MOVEMENT.
1. Brainstorm all possible merchandisable materials, services, and resources.
 2. Establish criteria for selection.
 3. Select and establish pricing policies.
 4. Establish form and implement catalogueing procedures.
- VII. IT IS RECOMMENDED THAT NON-PROFIT CORPORATIONS BE ESTABLISHED IN ASSOCIATION WITH RELIGIOUS HOUSES TO DEAL WITH COMMONALITY AND ADMINISTRATIVE ISSUES OF THE MOVEMENT LOCALLY, SUBJECT TO A COUNTRY-BY-COUNTRY STUDY OF VARIATIONS TO DETERMINE THE ADVISABILITY AND PARTICULARS OF EACH SUCH INCORPORATION, AND RECOGNIZING THAT DEVELOPMENTAL METHODS MAY ADDITIONALLY REQUIRE PROFIT CORPORATIONS.
1. Refer to colleagues involved in international operations, particularly non-profit ones, such as Red Cross International, to obtain such data as they have regarding specific foreign countries, utilizing a format created by development centrum.
 2. Centrum review of such data, supplemented by that submitted by religious houses regarding local situations and laws, the latter being furnished by local colleagues and particularly Guardians.
 3. Determine necessity of incorporation on a country by country

4. Complete incorporation required using as a prime resource those forces indicated above.

VIII. IT IS RECOMMENDED THAT THE GUARDIANS DEVELOP GLOBALIZED CONTEXT OF AUXILIARY SERVICES FOR PROFIT.

1. Research market for possible prospects to define their needs.
2. Bring together examples of where movement methods have been effective in meeting similar needs.
3. Create imaginal forms of communicating with potential purchasers.
4. Identify and contact avenues for informing potential purchasers of these services.

IX. IT IS RECOMMENDED THAT THE GUARDIANS DEVELOP COURSE MATERIALS AND TEACHING TOOLS FOR CULTURAL ORIENTATION AND EXPOSURE TO CONVERSATIONAL LANGUAGE.

1. Conduct feasibility study for establishing cultural orientation needs.
2. Establish country priorities for which courses should be prepared.
3. Develop, test and evaluate course construct.
4. Prepare pedagogical manual for course.

X. IT IS RECOMMENDED THAT ^{U.S.}GUARDIANS RECRUIT FOR A GLOBAL GROUP OF INDIGENOUS GUARDIANS, STUDENTS AND MEMBERS OF FOREIGN DIPLOMATIC CORPS IN THE UNITED STATES.

1. Students in technical schools and training programs of international corporations are recruiting prospects.
2. Enlist them to teach their own language and culture to overseas bound U.S. movement people.
3. Expect them to provide introductions and other aid to colleagues in their homeland.
4. U.S. movement families can recruit by extending home hospitality to visiting foreigners, and by gaining their participation in community special cultural celebrations.

Because of the global demands of the Spirit Movement, our forces must be deployed in countries across the globe, on a continually changing and flexible basis. In order to do this we make four major recommendations. The first is that data be gathered regarding the necessary travel documents and immigration regulations of the particular countries concerned. The second is that information be compiled respecting employment needs of the countries and the marketable skills of order members. Thirdly, we recommend that guardians use their particular skills and abilities in making contacts in ways aiding global deployment. Fourthly, we recommend an enabling construct consisting of the self-conscious use of the resources of the entire Spirit Movement whenever applicable for international deployment.

- I. IT IS RECOMMENDED THAT BOTH PRIVATE AND GOVERNMENT SOURCES BE CONTACTED TO DETERMINE INFORMATION REGARDING VISA ENTRY REQUIREMENTS FOR A PARTICULAR COUNTRY. IN PARTICULAR, THE FOLLOWING SOURCES SHOULD BE CONTACTED:
 1. The U. S. State Department
 2. Consulates and Embassies
 3. Government "higher-ups"
NOTE: Washington D. C. colleagues would be helpful in obtaining information from the above sources.
 4. Foreign students
 5. American Friends Service Committee (AFSC)
 6. Roman Catholic Church
 7. Colleagues who have been or are there now
- II. IT IS RECOMMENDED THAT IN ORDER TO DETERMINE THE LENGTH OF STAY PERMITTED IN A FOREIGN COUNTRY, CONTACT EXPERIENCED INDIVIDUALS, ORGANIZATIONS, AND GOVERNMENT SOURCES WITHIN THE U.S.A. AS WELL AS THE COUNTRY OF DEPLOYMENT FOR LISTS OF CRITICAL JOB CATEGORIES. THIS CAN BE ACCOMPLISHED BY:
 1. Contacting the same sources as listed above (U. S. State Department, Consulates and Embassies, foreign students, AFSC, Roman Catholic Church, and government "higher-ups"
 2. Contacting guardians and other colleagues who have been there.
 3. Contacting colleagues who are there now
NOTE: Be sure to determine the different types of "lengths of stay" under the various visa categories from the above three sources (visas such as student, military, WHO, pension, etc.)
- III. IT IS RECOMMENDED THAT, IN ORDER TO ASCERTAIN PERMITTED ACTIVITIES UNDER VISA CATEGORIES SUCH AS STUDENT, EMPLOYED ALIEN, ETC., CONTACT BE MADE WITH KEY PRIVATE AND GOVERNMENT SOURCES.
 1. Gather and store in useable form data, such as restrictions on activities imposed by different visas, from guardians and other colleagues who are now or have been overseas.
 2. Obtain from government sources the formal restrictions imposed by various visa categories.
 3. The key strategy would be to determine the type of visa for a given country that would allow the least restriction of activity.

- IV. IT IS RECOMMENDED THAT A DATA BANK BE CREATED TO INCLUDE A FILE OF ALL RELEVANT OVERSEAS EMPLOYMENT OPPORTUNITIES AND SPECIAL QUALIFICATIONS OF MOVEMENT PERSONNEL.
1. Coordinate data gathering from publications, agencies, corporations and personal contacts.
 2. Contact guardians with international connections for employment possibilities.
 3. Index all relevant information regarding order and extended order occupational experience and expertise.
 4. Update file by contact with overseas colleagues and visiting international friends.
- V. IT IS RECOMMENDED THAT A LIST OF CONTACTS BE DEVELOPED TO FOSTER OVERSEAS EMPLOYMENT OPPORTUNITIES FOR MOVEMENT PERSONNEL. IMPLEMENTATION OF THIS RECOMMENDATION COULD INCLUDE:
1. Acquiring copies of publication entitled "Educational Opportunities Abroad".
 2. Researching names of international employment agencies to get on their mailing list.
- VI. IT IS RECOMMENDED THAT SPECIAL GLOBAL EMPLOYMENT OPPORTUNITIES BE CREATED TO LEGITIMIZE FINANCIAL STANDING OF COLLEAGUES ASSIGNED OVERSEAS.
1. Create a "paper company" such as a chain of small hostels or an import/export business.
 2. Establish a missional permeation corporation or other unit that could support colleagues overseas and participate in rotating personnel out to overseas jobs requiring their special expertise for short periods.
 3. Enlist the services of a movement lawyer to research the legalities of such incorporation relative to visa and work permit regulations.
 4. Contact friendly nationals of countries involved to gain familiarity with their business practices.
- VII. IN ORDER TO ESTABLISH EFFECTIVE USE OF GUARDIAN INFLUENCE, WE RECOMMEND THAT GUARDIANS DEVELOP INTERNATIONAL CONTACTS WITH ROTARY, LIONS, JAYCEES, AND KIWANIS SERVICE CLUBS AND MAKE THESE RELATIONSHIPS AVAILABLE TO THE MOVEMENT. IN ORDER TO IMPLEMENT THIS RECOMMENDATION, WE WOULD HAVE TO:
1. Identify the location of the international headquarters and key contacts, such as the president or public relations officer within each organization.
 2. Have local guardians make contact and obtain information such as location and contact in each nation (state) or movement interest.
 3. These data would then be forwarded to the area or local religious house for contact and development.
 4. Guardians in that area could be used to further develop and expand these contacts by participating in local chapters, periodic calls, and being aware of business associates who belong to these organizations.
 5. Key persons within each service group could be recruited to LENS or RSI and/or be encouraged to utilize their influence for course sponsorship, obtaining jobs, visas, work permits, etc.

- VIII. IN ORDER FOR GUARDIANS TO PARTICIPATE MEANINGFULLY IN OVERSEAS MISSION, WE RECOMMEND THAT MODELS BE BUILT TO ENABLE THE GUARDIANS TO BE OF DIRECT SERVICE THROUGH ACTIVITIES SUCH AS TRANSPORTING MOVEMENT MATERIALS (eg. ITI AND LENS), "STAY AND PAY" IN RELIGIOUS HOUSES, THE USE OF VACATION, SABBATICALS, LEAVES OF ABSENCE TO ENGAGE VOCATIONAL SKILLS IN THE PERMEATION NEEDS OF OVERSEAS RELIGIOUS HOUSES AND BY PARTICIPATION IN REGIONAL AND AREA PSU'S FOR INPUT OF DATA AND RESEARCH ON A CONTINUAL BASIS.
1. Through participation in Guardian's Meetings and letter contact, guardians need to become aware of possibilities for their involvement in direct services.
 2. It is suggested that a Guardian's Centrum be created to mediate the availability of skills and time of guardians with the program needs of overseas activities and to provide for a means of regularized communication.
 3. Guardian Centrum would also perform necessary planning and anticipation of on-going program needs and maintain a current list of guardian availability and capability.
- IX. IN ORDER TO ESTABLISH A DATA CENTRUM, WE RECOMMEND THAT A FORMAT BE CREATED TO ENABLE COLLECTION, CORRELATION, AND DISSEMINATION OF DATA TO AND FROM ORDER AND MOVEMENT COLLEAGUES REGARDING EMPLOYMENT POSSIBILITIES, EXPERTISE POTENTIAL AND TRAVEL PROCEDURES, INCLUDING DATA FROM APPROPRIATE QUESTIONNAIRES COMPLETED BY MOVEMENT COLLEAGUES.
1. To submit a questionnaire to guardians regarding formations and contacts that would be helpful in obtaining employment and visas for deployed colleagues.
 2. Establish a file to be maintained at Symbolic Centrum containing listing of employment opportunities in the other eight continents.
 3. A request of all guardians to submit all journals and other sources which list overseas employment opportunities.
 4. Assign guardians in the six areas to research and contact international employment agencies in their area and submit information periodically.
- X. IN ORDER TO PROCURE TRAVEL DOCUMENTS FOR EMPLOYMENT ABROAD, WE RECOMMEND THAT THE GUARDIANS UTILIZE THE INDIRECT TACTICS OF (1) CULTIVATION OF RELATIONSHIPS WITH INTERNATIONAL CORPORATIONS AND INDIGENOUS LEADERS IN FOREIGN COUNTRIES TO OBTAIN ACCESS TO NEW OPPORTUNITIES FOR ENTRY INTO COUNTRIES AND (2) THE LEGITIMIZATION OF FINANCIAL SUPPORT THROUGH THE ESTABLISHMENT OF A NEW BUSINESS ENTITY SUCH AS A "WAYSIDE INN" OR THE USE OF THE "FIFTH CITY DEVELOPMENT CORPORATION".
1. Establish a network of guardians who have international business and government contacts who would be willing to use these relationships to secure employment and visas for deployed colleagues.
 2. Assign a group of guardians to cultivate the key leadership of other nations residing in this country.
 3. Bring intentionality into contacts with nationals of other countries while travelling overseas.
 4. Proceed with setting-up of business entities to enable employment of overseas colleagues.

in future

The ad hoc, experimental, and evolutionary of the symbolic order conflicts with the need for the continuing forms that enable the legal undergirding of the Movement. This need is compounded and given new dimensions by participation in the new global resurgence. The lack of proper legal structure is subjecting the order to liabilities, limitations, lost tax advantages, lost contributions, and conflicts with civil authorities. Thus, without seriously inhibiting the dynamic life of the order, available legal council must find forms that are recognized by society. Creating a form for the order in harmony with existing legal structures could provide significant new resources for the growth of the spirit movement.

I. IT IS RECOMMENDED THAT THE ECUMENICAL INSTITUTE BE INCORPORATED IN EVERY STATE AND COUNTRY WHERE IT IS OPERATING, TO PROMOTE LOCAL RESPONSIBILITY AND AREA CONTROL.

1. Assigned area and regional legal counsel to take responsibility for creating non-profit corporations in the several states and countries.
2. All corporations to be directly controlled by the Board of the Ecumenical Institute.
3. Each corporation to be named "The Ecumenical Institute: (local designation)".

II. IT IS RECOMMENDED THAT THE ORDER ESTABLISH ITSELF AS A NONPROFIT LEGAL ENTITY, IN WHATEVER FORM IS NECESSARY TO DEAL WITH THE TAX STATUS OF EARNED INCOME, GIFTS, AND INVESTMENT, AND TO PROTECT AGAINST LIABILITIES.

1. Research Religious Orders and fraternal organizations.
2. Research U.S. tax laws.
3. Describe feasibility of establishing Order as a legal entity holding the value of symbolic relationship to Historical Church.

III. IT IS RECOMMENDED THAT WAYS AND PROCEDURES BE DETERMINED AND DEVELOPED TO MINIMIZE TAX LIABILITY AND MAXIMIZE BENEFITS FOR THE ORDER, THE INSTITUTE AND RELATED INDIVIDUALS.

1. Explore possibility of minimizing personal income tax payment of the Order people on income from external employment in connection with incorporation of the Order as non-profit organization.
2. Explore possibility of E.I. (or the Order as incorporated entity) acting as a contract employer to outside businesses and governments. (e.g. Manpower)
3. Explore possibility of personal income tax deduction through ~~depreciation~~ of R.H. property and tax payment thereby.
4. Explore the possibility of maximizing property tax exemption or elimination of property tax through change of ownership to E.I.
5. Explore possibility of tax deduction in addition to cash contributions through a check list of allowed expenses that can

depreciation

be deducted as for benefit of a non-profit organization
(e.g. Ecumenical Institute).

- IV. IT IS RECOMMENDED THAT THE POTENTIAL LIABILITY OF THE ORDER AND THE INSTITUTE BE DETERMINED IN ALL AREAS, PARTICULARLY REGARDING REAL ESTATE AND AUTOMOBILES, AND THAT STEPS BE TAKEN TO MINIMIZE EXPOSURE THROUGH TRANSFERS OF TITLE AND EXPLORING VARIETIES OF COVERAGE, INCLUDING GROUP COVERAGE.
1. Investigate group insurance for Area Houses and automobiles.
 2. Set levels of minimum liability and fire insurance.
 3. Compare premiums and scope of coverage for different policies.
- V. IT IS RECOMMENDED THAT WHEN ACQUIRING PROPERTY FOR HOUSING, FIRST CONSIDERATION BE GIVEN TO LEASING TO RETAIN THE FLEXIBILITY AND MINIMUM INVESTMENT. ALL PROPERTY LEASED OR PURCHASED SHOULD BE IN THE NAME OF THE ECUMENICAL INSTITUTE INCORPORATED IN THAT AREA.
1. Establish break even point between personal ownership by high-salaried Order members taking depreciation vs. ownership by The Ecumenical Institute.
 2. Spend 1 year searching for leasing prospects.
 3. Look for gift of house.
 4. Explore the possibility of maximizing property tax exemption benefit through change of ownership to The Ecumenical Institute.
 5. Explore the possibility of tax deduction expenses incurred by collaborations.
- VI. IT IS RECOMMENDED THAT A FILE BE CREATED AT SYMBOLIC CENTRUM CONTAINING ALL LEGAL DOCUMENTS PERTAINING TO RELIGIOUS HOUSES AND CORPORATE ORG.
1. Make list of all colleagues who are lawyers and accountants by metros.
 2. Establish contact person at Symbolic Centrum to act as liason with metro lawyers.
 3. List areas of concern where local legal advice may be necessary:
 - a. State law: Real estate exemption where property used by religious organization.
 - b. Necessary form for organization to qualify as tax exempt religious organization.
 - c. Procedure for organizing non-profit organization.
- VII. IT IS RECOMMENDED THAT A COMPREHENSIVE MODEL BE CREATED FOR THE CARE OF ORDER MEMBERS IN ANY COUNTRY, INCLUDING GUARDIANSHIP DOCUMENTS, LIFE INSURANCE, HEALTH INSURANCE COVERAGE AROUND THE GLOBE, AND A MODEL BE PROVIDED.
1. The Order should prepare a comprehensive model for the care of children of members of the Order not living under the direct supervision of their parents.
 2. Legal counsel for the Institute should prepare whatever legal documents are required to implement the "care" model.
 3. The life and health insurance of members of the Order be reviewed by an insurance agent selected by the Institute.

4. A model ^{will} for members of the Order ~~will~~ be prepared by legal counsel.
- VIII. IT IS RECOMMENDED THAT THE NAMES THE ECUMENICAL INSTITUTE, INSTITUTE OF CULTURAL AFFAIRS, AND INTERNATIONAL TRAINING INSTITUTE BE PROTECTED FROM UNAUTHORIZED USE IN EVERY COUNTRY.
- IX. EXPLORE ADVISABILITY OF SEPARATE DIVISIONS WITHIN THE INSTITUTE TO FACILITATE PROMOTION OF SECULAR COURSES, e.g. LENS.
1. Design printed material to show relationship to Institute of Cultural Affairs rather than The Ecumenical Institute.
 2. Research in what areas use of The Ecumenical Institute would not be advantageous.
- X. IT IS RECOMMENDED THAT CONSIDERATION BE GIVEN TO THE LEGAL DOMICILING OF THE GLOBAL SPIRIT MOVEMENT AND ~~MOST PRECIPITIOUS~~ CITIZENSHIP OF ITS COLLEAGUES.

As the Movement extends into geographic areas and into new global social dimensions, a need is perceived to establish policy guidelines and manuals to initiate, sustain, and nurture the established groups and individuals. Secular permeation deals with diffusing the secular movement message into global society's secular segments.

- I. IT IS RECOMMENDED THAT SOCIO-SPIRIT (EDGE)/STYLE WORKSHOPS BE ESTABLISHED TO (A) POINT UP THE IMPORTANT SOCIO-SPIRIT ISSUES OF THE DAY AND (B) PROVIDE INFORMATION EXPLAINING THE VARIOUS CULTURAL LIFE STYLES.
 1. Select several people to participate in a workshop of the socio-spirit life-style issues who are aware of cultural life styles and sensitive to social issues.
 2. The group would contain guardians primarily and would suggest a common of global citizenship.
 3. 100 Guardians workshop participants and leaders will embark on a global Odyssey in 3 groups each of which focuses 2/3 of its trip in one of the spheres--East, West or South.
 4. Recent global trip returnees would work with several of the trip group leaders to develop a questionnaire and screen for gathering data on the Odysseys.
- II. IT IS RECOMMENDED THAT POPULAR PREACHING BE THOROUGHLY RESEARCHED IN ORDER THAT THEY MAY BE USED EFFECTIVELY IN INFORMAL AND STRUCTURED SITUATIONS.
 1. Look at research from S'72 "Secular Impactment Schemes" in regional workshops.
 2. Regional Religious House
 3. a. Build practical implementation model
b. Notify Religious House priors
 4. a. Turn over to Religious House to conduct
b. with 10 Guardians present
- III. IT IS RECOMMENDED THAT A "DESERT NURTURE" MODEL BE DEVELOPED THROUGH SELF-SUSTAINING SYMBOLIC LIFE.
 1. The first practical step in implementing this is to have a Guardian assigned to LENS course to gather data relative to key participants.
 2. Guardians would make these assignments.
 3. The key step in implementing this would be the initiation of some form of an areal organization of Guardians.
 4. Key strategies and tactics would be related to gathering current wisdom relative to experiments in secular solitaries currently being tried by permeators.
- IV. IT IS RECOMMENDED THAT A LISTING OF KEY GROUPS WITH ESTABLISHED IN -SERVICE PROGRAMS BE PREPARED AND THAT THESE GROUPS BE PRIORITIZED ON THE BASES OF SOCIETAL IMPACT. IT IS FURTHER RECOMMENDED THAT A LIST OF PERSONAL ACQUAINTANCES AND CONTACTS BE PREPARED BY EVERY MEMBER OF THE MOVEMENT.

1. To implement this recommendation a questionnaire will be completed by each LENS grad. The questionnaire will be built on and be an updated version of the questionnaire given to the Guardians in Fall '72.
2. A group of Chicago Guardians and representatives from Symbolic Centrum will create the questionnaire.
3. A PSU will be held this spring in every area to determine the priorities of the secular groups to be impacted and to pick the individuals who need to be contacted immediately.
4. Groups and individuals will be contacted by Guardians in each area.

V. IT IS RECOMMENDED THAT AT THE END OF A LENS COURSE, THE OPPORTUNITY FOR PARTICIPATION IN COURSES SUCH AS RS-I BE INDICATED AND THE NEED FOR FINANCIAL SUPPORT STATED E.G. SCHOLARSHIPS AND OVERSEAS GRANTS.

The remarks should be prepared and delivered by a Guardian in the area in which the course is held. The remarks should include references to the experience of graduates of previous LENS courses and be supported by endorsements in brochures handed out at the end of the course.

- VI. IT IS RECOMMENDED THAT A MANUAL EMBRACING POLICY GUIDELINES BY PREPARED INCORPORATING METHODOLOGIES FOR WRITING ARTICLES FOR PUBLICATION. FURTHER ON IN DEPTH STUDY OF PROPER PUBLISHING OUTLETS SHOULD BE DEVELOPED.
1. Examine existing literature.
 2. Guardian writer; centrum
 3. Write manual with guidelines, policies and suggested publication outlets.
 4. Articles on resurgence written.
- VII. IT IS RECOMMENDED THAT A GLOBAL EMPLOYMENT AGENCY BE CREATED THROUGH WHICH INFORMATION FROM GUARDIANS AND LENS GRADUATES CAN BE DISSEMINATED CONCERNING GLOBAL EMPLOYMENT OPPORTUNITIES AND LOCAL TRAINING PROGRAMS FOR SECULAR PERMEATOR, WHETHER GUARDIANS, SYMBOLIC ORDER OR MOVEMENT COLLEAGUES.
1. Design a form for obtaining data from present permeators and Guardians on global employment opportunities.
 2. The task is to be accomplished by Guardians, permeators and Order Centrum with Order Strategies Post as co-ordinator.
 3. The recommendation will be implemented by Order Strategies issuing the data form to Guardians and permeators for return and filing at Order Centrum.
 4. A key strategy would be to have Guardians and permeators send in employment information on back of there business card.
- VIII. IT IS RECOMMENDED THAT A SPEAKER'S BUREAU BE ESTABLISHED TO PROVIDE RELEVANT MOVEMENT WISDOM TO WELL KNOWN SPEAKERS, AND TO PREPARE THREE CLASSICAL TALKS ON RESURGENCE (ONE OF WHICH MIGHT BE A SPIRIT TRAVELOG) FOR PRESENTATION TO CIVIC OR SERVICE GROUPS.
1. Prepare list of Guardians that are good speakers; get their names on speaking lists.
 2. Prepare list of wellknown speakers that should receive movement documents or visits.
 3. Develop materials (e.g. 4 X 4s, handouts).
 4. Develop recruitment model to be implemented three months after talks.

- IX. IT IS RECOMMENDED THAT A MANUAL BE PREPARED DESCRIBING HOW TO DEVELOP ART FORM CONVERSATIONS, MINISPEECHES AND SECULAR RELIGIOUS GREETINGS AND CLOSINGS IN ORDER TO AWAKEN AN AWARENESS OF THE SPIRIT DEEPS IN COMMON SECULAR SITUATIONS.
1. Develop the manual, after researching types of situations.
 2. Guardians who are Academy graduates have the required training in the art form methodology.
 3. Hold 2 PSU's, one writing the manual, a period of testing, and one for final rewrite.
 4. Recruit new Guardians and nurture experienced Guardians.
- X. IT IS RECOMMENDED THAT FINANCIAL GUIDELINES BE ESTABLISHED FOR REGIONAL SECULAR PERMEATION EVENTS, SUCH AS LENS AND SPEAKERS BUREAU HONORARIUMS.
1. Gather existing data regarding LENS course fees.
 2. To be done by Centrum and a Chicago Guardian.
 3. Form a PSU of Chicago Guardians and Centrum leadership to establish standard LENS charges and honorarium policy.
 4. Disseminate charges to appropriate people.

The entire context of the Guardian experiment has shifted as a result of the forthcoming Guardian meeting in Hong Kong, expansion of LENS courses across the globe and the recent Guardian global trip. The issues that have emerged are the implications of going to the globe and future possibilities of the Guardian experiment. These indicatives have created a demand for a practical strategic design relative to a global network of Guardian consultants. At present there exists no formulated network of consults to release the available skills of the guardians nor of secular man within professional and service organizations. The fourth Guardian consult therefore makes the following ten recommendations.

- I. IT IS RECOMMENDED THAT A DIRECTORY OF ALL DESIGNATED GUARDIANS BE COMPILED AND REGULARLY UPDATED TO INCLUDE ESSENTIAL IDENTIFYING AND DESCRIPTIVE DATA, CROSS-INDEXED BY PRINCIPLE CATEGORIES.
 1. A questionnaire to be designed for use by all Guardians.
 2. Data from questionnaire to be collected on IBM cards with identifying information needed for consult assignment.
 3. Design layout for Guardian Directory
 4. Set up procedure for continual up-dating
- II. IT IS RECOMMENDED THAT A GRID OF CURRENT MOVEMENT AND WORLD CONTRADICTIONS BE DEVELOPED THAT FOCUSES THE SPECIFIC ARENAS FOR ENGAGEMENT AND FACILITATES SOPHISTICATED INTERCULTURAL RELATIONS.
 1. Problem solving units by religious houses to set up one year timeline, of goals.
 2. Send goals to Guardians for review
 3. Contradiction analysis from Summer 1971 to create chart of needed consultations.
 4. Global trips to needed consultations and evaluate consultations.
- III. IT IS RECOMMENDED THAT A MOVEMENT GUARDIAN DATA BANK BE ESTABLISHED TO FACILITATE CONSULTANT EFFECTIVENESS.
 1. A data centrum needs to be created and basic operating procedures established for receiving and passing on the data.
 2. Procedures need to be established for Guardians to report personal travel itineraries to data centrum.
 3. Procedures need to be established for Religious Houses to determine and report their local consultation needs and opportunities.
 4. Procedures need to be established to identify, catalogue and disseminate through the network information on specific deployment opportunities as they arise.
- IV. TO ENABLE GUARDIAN SPIRIT NURTURE AND ENGAGEMENT IT IS RECOMMENDED THAT A LASTING MODEL BE CREATED ON AN AREA BASIS AND IMPLEMENTED ON A REGIONAL LEVEL.
 1. To know what consults are needed, use the data bank as the primary resource.
 2. Relaying necessary assignments for consultation requests would be done through a centrum.

3. Centrum would alert receiving Regions of Guardians arrival and coordinate consultative services relative to Guardians journey.
4. It is necessary that each religious house assess its needs relative to consults and that it build practical formats for particular guardian visits.
- V. IT IS RECOMMENDED THAT THERE BE A METHOD OF TRAINING CONSULTATIONS IN SELF IMAGE OF SOPHISTICATION AND MOVEMENTAL WISDOM.
 1. Through collation of wisdom and research in social processes and customs create a visionary document speaking to the urgency of the times.
 2. Create a handbook of crucial customs and laws.
 3. Guardians will set the time for training themselves as consultants.
 4. A common set of procedures should be established providing for briefing sessions prior to consults and post-consult evaluation.
- VI. IT IS RECOMMENDED THAT A COMPREHENSIVE CHECKLIST BE CREATED AS A BASIS FOR ORGANIZING EACH CONSULTING ASSIGNMENT.
 1. The format for the checklist would be created by an ad hoc PSU to be used as the initial context for each consultation.
 2. Pilot consults would be carried out using the checklist and evaluating its power as a tool.
 3. Revision of the checklist format would be carried out prior to the massive enactment of consultative activities.
 4. Ongoing re-evaluation of checklist would insure that it continued to carry the necessary categories and grids to organize the context for the assignment.
- VII. IT IS RECOMMENDED THAT THERE BE DEVELOPED THE BASIC TOOLS AND INSTRUMENTS FOR SECULAR CONTACT AND PUBLIC RECOGNITION OF THE MOVEMENT AS A CONSULTATIVE RESOURCE.
 1. List all sponsors for global programs with their professional and/or social status.
 2. Brainstorm target audiences from directories and experiential knowledge.
 3. Design innovative brochures, pitches and advertisements appropriate to selected target audiences.
 4. Secure professional skills to enable effectiveness in public relations media design.
- VIII. IT IS RECOMMENDED THAT A CONSULTANTS ASSIGNMENT RATIONALE BE CONSTRUCTED AND IMPLEMENTED FOR INDIVIDUALS, TEAMS AND GROUPS SO AS TO DEPLOY CONSULTANTS WITH MAXIMUM EFFECTIVENESS.
 1. From the hosting model in Recommendation IV select the needed consultations and organize them into a comprehensive gestalt of the missional arenas.
 2. Design a matrix of consultations interlocking project requirements and Guardian gifts.
 3. Have a team of six Guardians for each of the areas of each continent to make up an initial set of Guardian assignments according to geography and time tracks.
 4. Draw up the operating procedures for a speakers bureau which presents the vision and availability of the guardians, locates opportunities for consultations and keeps the results of the consultations for future speeches and for the data bank.

- IX. GUARDIANS, ACTING AS CONSULTANTS, ASSUME PRIMARY RESPONSIBILITY FOR RECRUITING, TEACHING AND PREPARING FOR LENS COURSES.
1. LENS course preparation model be developed by a Guardian Council.
 2. LENS preparation will require initially an area pedagogy guild for Guardians, to be established in areas.
 3. As a council, Guardians will develop an enlistment pitch and a model for locating and contacting key organizations in course location cities.
 4. Follow-up of model entails locating and contacting lay organization recruitment referrals that are secured.
- X. IT IS RECOMMENDED THAT GUARDIANS FORM A GLOBAL ODYSSEY TO FORMULATE GUARDIANS ACCORDING TO PRIORITY AREAS OF THE GLOBE AND SENSE AND REPORT POTENTIAL CONSULTATION OPPORTUNITIES.
1. A guardian centrum dynamic would create alternative itineraries based on particular movement priorities and alerted areas of consult opportunities.
 2. Recruitment and formulation models would be designed in each area for guardians from recent LENS grads and recruiting same to the odyssey.
 3. Models also would be created by areas to recruit key guardians to the odyssey including enabling stories, area quotas, and a rationale for assignment to the odyssey.
 4. A team constituency rationale would be designed on the centrum level for delineating how many of which professions as well as which individual gifts were needed on the odyssey.

DEVELOPMENT PRACTICUM

The global expansion of the movement in the midst of the turn to the world has raised to self-consciousness the need for ongoing support from a broad base of movemental colleagues. The first step in building this base has begun. The development practicum was created as a result of the November guardians meeting, and has been initiated in 10 regions this past quarter. One of the pressing issues now is the form of the ongoing development activity in the region. A second issue is the expansion of the patron network in each region. Some of the questions related to these issues are:

1. What are some of the movemental groups that should be contacted and how should the contact be made?
2. What should be the form of the individual calling network, and what should be the content of the calls, and what training is needed to establish this network?
3. What are the ways in which the region can symbolize for itself its ongoing development responsibility?
4. What brochures, letters and materials are needed?
5. What might be the form and content of convocations and/or rallies which might be used to broaden the contact base?
6. What global happenings/ celebrations would be helpful in rehearsing the commitment made by our colleagues to fund the global movement?
7. What is the mail and phone call follow-up system needed?
8. What data systems are needed regionally and at symbolic centrum for followup?
9. What are some potential audiences (groups, clubs, etc.)?
10. How might we acquire a list of potential patrons?
11. What are some approaches that would be effective in contacting individual patrons?
12. What approaches would be effective for group contact?
13. What are the stories and spins that will release patron funding from individuals and groups?
14. What brochures and materials are needed to develop the patron network?
15. What is the edge or current mindset of funding groups and individual patrons?
16. What presentation methods might be used to reach the individuals and groups?

Growth of movemental activities over the globe has been at an exponential rate in recent years. This growth has outstripped current development strategies with respect to providing the kind of funding needed, raising to consciousness the demand for broad-based, on-going, well-organized economic support for such activities. Development heretofore has been performed on a "crisis-oriented" basis by centrum colleagues who specialize in fund raising. It is therefore necessary to enable regional colleagues to image development as that without which the mission is unattainable and begin to assume increased responsibility for planning, organizing and implementing a futuristic, intensive and on-going development effort.

- I. IT IS RECOMMENDED THAT THE ROLE OF THE CENTRUM DEVELOPMENT OFFICE BE SHIFTED TO LONG RANGE VISIONING OF GLOBAL NEEDS, THAT IT PERFORM CENTRAL DATA COLLECTION AND DISBURSEMENT ON BEHALF OF THE REGIONAL/ AREA AND IT PROVIDE FOLLOW-UP COMMUNICATION IN TERMS OF GLOBAL NEWS TO ALL CONTRIBUTORS.
 1. Set four-year global budget.
 2. Centrum to provide quarterly grad/donor print out to regional development coordinator.
 3. Region supplies centrum with complete donor list.
 4. Develop journey rationale for regular/potential donor mailings.
- II. IT IS RECOMMENDED THAT RESPONSIBILITY FOR REGIONAL DEVELOPMENT ACTIVITIES BE ASSIGNED TO A REGIONAL DEVELOPMENT CO-ORDINATOR.
 1. Brainstorm list of colleagues who are potential Regional Development Co-ordinators.
 2. Concerned Guardians.
 3. Making selected colleague an "offer he cannot refuse."
 4. Design offer, arrange nurture for Regional Development Coordinator.
- III. IT IS RECOMMENDED THAT A DEVELOPMENT MODEL BE MADE PART OF EACH AREA'S AND REGION'S TOTAL MISSIONAL PROGRAM; AND THAT PENETRATION CALLERS ATTEND A DEVELOPMENT PRACTICUM SINCE SUCCESSFUL PENETRATION IS VERY "KEY" TO FISCAL DEVELOPMENT.
 1. Review current missional model.
 2. Determine financial requirements for the Region, etc.
 3. Integrate Development Program into missional goals.
 4. Identify and analyze sources of revenue.
- IV. IT IS RECOMMENDED THAT IN ORDER THAT FUND RAISING BE IMAGED AS AN ON-GOING LONG-RANGE PROGRAM, AN ANNUAL FUND-RAISING CALL BE MADE ON EACH PROSPECT TO OBTAIN A SIGNIFICANT PLEDGE.

1. Compile list of regional donors, date last called on and response.
 2. Regional Development Coordinator, et. al.
 3. Involving colleagues in training events.
 4. Schedule development calls throughout the year; design pledge cards; organize thank yous and follow-up; coordinate with penetration and formulation efforts in region; set up record system; design development kits.
- V. IT IS RECOMMENDED THAT EACH REGION CREATE A DEVELOPMENT NETWORK WITH AT LEAST ONE PERSON IN EACH METRO RESPONSIBLE FOR THE DEVELOPMENT EFFORT IN THAT METRO.
1. Each metro assigns a development coordinator.
 2. Arrange for joint meeting between Development Centrum and Metro Development Coordinators.
 3. Develop regional development model.
 4. Present development model to regional council for consensus.
- VI. IT IS RECOMMENDED THAT DEVELOPMENT TRAINING EVENTS BE HELD REGULARLY ON THE REGIONAL LEVEL.
1. Schedule training event in conjunction with regional practicum.
 2. Regional Development Coordinator.
 3. Enable participation of key potential development callers.
 4. Role-playing training; link trained and untrained callers; tell miracle stories; publish dates of events on regional calendar; set up appointments.
- VII. IT IS RECOMMENDED THAT THE REGIONAL DEVELOPMENT AND DEVELOPMENT CENTRUM ESTABLISH A COMMON ACCOUNTABILITY AND PLEDGE ACKNOWLEDGMENT PROCEDURE.
1. Common accountability model between regional development coordinator and centrum.
 2. Year end victory celebration at Regional Council.
 3. Set up regional card file.
- VIII. IT IS RECOMMENDED THAT LOCAL CADRES ADOPT A COMPREHENSIVE FUNDING PLAN WHEREBY CONTRIBUTIONS ARE SENT OUT FOR GLOBAL PURPOSES, AND LOCAL NEEDS ARE FINANCED FROM REVENUE DERIVED FROM COURSES, THUS UNDERSCORING THE INDICATIVE OF INTENSIVE PENETRATION.
1. Arrange for concerned guardian to meet with each cadre in region and explain plan.
 2. Regional Development Coordinator and colleagues.
 3. Build a comprehensive presentation complete with miracle stories and figures, which outlines how local financial needs can be met using intensified penetration.
 4. Establish timeline showing "cutover"; involve penetration colleagues; short courses for local colleagues relative to global needs.

- IX. IT IS RECOMMENDED THAT ENDORSEMENTS AND AUTHORIZATIONS BE SOUGHT FROM LOCAL CIVIC AND ECCLESIASTICAL LEADERS FOR USE IN PUBLISHED MATERIALS AND IN DEVELOPMENT PITCHES.
1. List leaders from whom endorsements will be sought.
 2. Regional Development Coordinator, et. al.
 3. Recruit selected leaders to LENS or RS-I.
 4. Coordinate with penetration; get lists from Chambers of Commerce and church groups; make development call shortly after prospect's participation in event; get data from pedagogues.
- X. IT IS RECOMMENDED THAT LOCAL MAN BE ENABLED TO SEE THE MOVEMENTAL GLOBAL STORY OF POSSIBILITY THROUGH THE USE OF IMAGINAL AIDS.
1. Establish speakers' bureau.
 2. Develop story presentations on cassettes.
 3. Create color slide presentations of demonstration projects and global trips.
 4. Film the 5th City Demonstration Project.

One of the key concerns in developing on-going movement financial support from a broad base of interests is the expansion of a patrons network for each region. Patron support is imaged as significant donations from non-movemental individual sources. In the past significant efforts in this area have been blocked by seeing patron participation in traditional giving terms, where charity is the primary giving image. In order to release ourselves in this area, we must reimage patron giving not as charity, but as expending resources locally to further the global humanizing process. This reimagining will take place through implementation of the recommendations and their associated tactics. As a result of the actualization of these tactics a self-conscious decision relative to taking a relationship to the patron will allow an intensified thrust into the arena of patron support of the Global Spirit Movement.

- I. SHARE WITH COLLEAGUES MIRACLE STORIES CONCERNING STRATEGIES THAT ENABLED SUCCESSFUL PATRON DEVELOPMENT CALLS.
1. Colleague making call execute document.
 2. File locally.
 3. Mail copy to base.
 4. Centrum incorporate these stories in monthly newsletter to Regional/Metro Development Coordinator.
- II. SPIN MIRACLE STORIES THAT ALLOW PATRONS TO SEE GLOBALITY AND COMPREHENSIVENESS OF MOVEMENT.
1. Assign Research Station to compile data that hold miracle stories.
 2. Assign Development Centrum to disseminate data to region.
 3. Establish timeline for compilation and dissemination of current data.

4. Workshop to adapt to local conditions.
- III. ESTABLISH STRUCTURES IN REGION/METRO/POLIS FOR WORKSHOPS PROVIDING COLLEAGUES WITH STORY AND STYLE THAT WILL IMPACT LOCAL PATRONS.
1. Get workshop on quarterly timeline.
 2. Presidium coordinator assign workshop.
 3. Development coordinator structure workshop.
 4. Development coordinator responsible for getting key people into workshop.
- IV. STRATEGIC PENETRATION OF SOCIAL STRUCTURES FOR IDENTIFICATION AND INITIAL CONTACT OF PATRONS.
1. Compile directory of social structures.
 2. Guardians assume responsibility.
 3. Regional Guardians meeting quarterly.
 4. Brainstorm what groups should be penetrated.
- V. ONE-YEAR AND FIVE-YEAR BATTLEPLANS TO INSURE THAT TRAINING, PENETRATION STORY DEVELOPMENT AND DECOR RATIONALE ARE PULLED TOGETHER IN A COORDINATED AND COMPREHENSIVE PROGRAM.
1. Coordinate with other development plans.
 2. Regional Development Coordinator will coordinate.
 3. Include in Regional Presidium Agenda.
 4. Pull out existing data and make five year projection.
- VI. DESIGN DECOR WHICH HOLDS THE LOCAL FOR THE SAKE OF THE GLOBE IMAGE BEFORE COLLEAGUES AND PROSPECTIVE PATRONS.
1. Procure hourglass symbols.
 2. Regional Development Coordinator and...
 3. Metro Development Coordinator suggest modification of basic symbol to reflect local culture.
 4. Regional Council implements development decor.
- VII. WE RECOMMEND THAT STRUCTURES BE CREATED WHICH HONOR PATRONS AND PROVIDE REGULAR RECOGNITION FOR SIGNIFICANT SUPPORT.
1. Design format for Global categories of giving.
 2. Chicago Development Centrum assigned to design format.
 3. Chicago Development Centrum furnish regions with format.
- VIII. WE RECOMMEND THAT A PATRON PROCUREMENT PLAN BE BUILT AND IMPLEMENTED WHICH INCLUDES PATRON LOCATING RESOURCES, A STRATEGIC PATRON CONTACT MODEL, DETAILED METHODS WHICH IMPACT THE PATRON AND FINALLY A MODEL FOR OBTAINING THE GIFT.
1. Locate patrons.
 2. Contact Model for patron call.
 3. Impact patron.
 4. Secure gift from patron.

IX. WE RECOMMEND THAT AN ADEQUATE SYSTEM OF FOLLOW-UP BE CREATED AND IMPLEMENTED WHICH WILL NURTURE AND SUSTAIN PATRONS.

1. Get on timeline for Region.
2. Regional Development Coordinator responsible.
3. Keep patron informed through newsletters and/or nurture calls.
4. Coordinate with Base and model.

We recommend that an experiment be initiated whereby area Guardians share responsibility with Symbolic Centrum for raising funds from Foundations, Corporations, Government, and related institutions in each area. The intent would be a network of Guardians throughout each area that would work with Symbolic Centrum in providing data, contacts, and liaison; assisting with the preparation of sophisticated imaginal materials, proposal writing and nurture of prospective sources; all enabled by internal accountability. This recommendation envisions broadening the Guardian's role from advisory to direct participation in the activity of Capital Funding.

- I. IT IS RECOMMENDED THAT CONCISE HIGH QUALITY, IMAGINAL CALLING DOCUMENTS WHICH PRESENT AN AUTHENTIC E.I. IMAGE BE PREPARED UNDER SEVERAL SECULAR NAMES.
 1. Research existing E.I. material.
 2. Prepare photograph which illustrate signal projects and education programs.
 3. Professional writers--illustrators to design and prepare final documents.
- II. PREPARE MATRIX OF DATA AND STORIES FOR USE BY AREA DEVELOPERS, FROM EVERY POSSIBLE PERSPECTIVE: NEED, INTEREST, GEOGRAPHICAL AREA, SELF-UNDERSTANDING, AND ISSUE: WITH A SAMPLE PROPOSAL FOR A HYPOTHETICAL INSTITUTION FROM THIS DATA.
 1. Collect data.
 2. Design matrix for holding data.
 3. Store data in this retrievable form.
 4. Prepare sample proposal.
- III. CONSIDER USING ALTERNATE SECULAR NAME IN INSTITUTIONAL FUND RAISING.
 1. International Training Institute.
 2. Institute for Cultural Studies.
 3. Guardians.
- IV. IT IS RECOMMENDED THAT THE RESPONSIBILITY FOR CAPITAL FUNDING WILL BE SHARED BY SYMBOLIC CENTRUM AND MOVEMENT GUARDIANS. THE GUARDIANS WILL SET AREAL GOALS AND THROUGH REGIONAL STRUCTURES WILL CREATE AND IMPLEMENT THE MACHINERY NECESSARY TO MEET THE GOALS.
 1. Areal Movement Guardian meeting to determine goals.
 2. Symbolic Centrum creates a capital funds proposal document.
 3. Guardians in each region assigned to gun capital funding in conjunction with Symbolic Centrum.
- V. CREATE AT AREA LEVEL SPECIFIC PRESENTATIONS USING THE WISDOM FROM THE CORPORATIONS AND FOUNDATIONS ON ISSUES IN WHICH THEY ARE INTERESTED IN ORDER TO TAILOR OUR PRESENTATIONS TO THEIR NEEDS.
 1. Do research on foundations and corporation givers stated arenas in their charters and publications.
 2. Keep alert through business news stories on corporate problems and activities.
 3. Keep alert to news of rational trends which match our concerns.

4. Match up gathered data on corporate needs to determine compatability with our programs and emphasize those areas.
 5. Interview knowledgeable corporate executives concerning the corporate concerns.
 6. Fund and use key phases that speak the language of the corporation being addressed.
 7. Search out from key contact what is needed in the way of documentation in a proposal.
- VI. CREATE A TEMPORARY METRO CAPITAL FUND TASK FORCE FOR THE GATHERING OF DATA ON LOCAL CORPORATIONS, FOUNDATIONS AND OTHER INSTITUTIONS.
1. Metro Guardians decide on key corporations and data required.
 2. Create list of RS-I grads, LENS grads, and friends.
 3. Have contextual meeting to enlist their support (Invite 75 people and expect to get 20.)
 4. Provide for spirit nurture of group.
- VII. IT IS RECOMMENDED THAT SYMBOLIC CENTRUM AND THE MOVEMENT GUARDIANS CREATE AND MAINTAIN A CONTACT NURTURE PROGRAM FOR THE PURPOSE OF SUSTAINING A CONSCIOUS MOVEMENT IMAGE BEFORE CORPORATION, FOUNDATIONS, GOVERNMENT AND RELATED AGENCIES.
1. Quarterly reports to corporations and foundations.
 2. Quarterly nurture visit to prospective donors.
 3. Update printout.
- VIII. IT IS RECOMMENDED THAT SPECIALLY DIRECTED REPORTS BE DELIVERED TO EXISTING DONORS AND MOST PROBABLE PROSPECTIVE DONORS ACCOUNTING FOR OUR STEWARDSHIP OF THE DONATED FUNDS.
1. Begin a complete accounting system which carefully tabulates income and expenditures.
 2. Write an imaginal report on programs in progress.
 3. Send these reports quarterly.
 4. Include miracle stories and penetration figures, etc.
- IX. CREATE AN AREA DATA INTERCHANGE REPORT TO BE ISSUED REGULARLY TO ALL GUARDIANS INDICATING THE PROGRESS OF NEGOTIATIONS WITH INSTITUTIONS AND NEWLY PERCEIVED NEEDS IN FUND-RAISING BASED ON INFORMATION RECEIVED FROM AREA GUARDIANS AND OTHER SOURCES.
1. Design report form.
 2. Create structure for collecting reports.
 3. Create format for compiling reports into a "newsletter."
 4. Print newsletter.
 5. Create distribution structure.
- X. CREATE PROCEDURES FOR INTERCHANGE AND EVALUATION OF AREAL STRATEGIES AND TACTICS IN VIEW OF GLOBAL NEEDS--AS THE BASIS FOR PLANNING FUTURE INSTITUTIONAL FUND-RAISING IN EACH AREA.
1. Each Area will evaluate the strategies and tactics used in its own efforts, on a quarterly basis.
 2. Symbolic Centrum will devise a standard evaluation form.
 3. This evaluation will be reduced to a written report, pointing out

which techniques worked and which did not.

4. Where original techniques are tried, report will spell out details-- the "do's" and "don't's."
5. Symbolic Centrum will distribute copies of all Area reports to each of the other Areas, together with a compilation of all of them.
6. Symbolic Centrum to share with Area Guardians its own insights and methodologies.

CAPITAL FUNDING

Capital Funding is the arena of raising major funds from such resources as corporations, foundations and governments. The Institute's operating principle is to submit strategic proposals to selected funding resources which maximize the possibility of releasing large amounts of money for an extended period of time. Two of the broad issues for capital funding are the role and utilization of the Guardian network and the strategy of an annual capital funding campaign to allow for the financial leap we anticipate yearly.

1. How would one allow for the annual slack of \$250,000 yearly?
2. Is there an obvious \$50,000 source we have overlooked?
3. How might we bring home our 2 key capital funds proposals, Bush and Kresge?
4. Where are individual acquaintanceships that could grant us \$20,000 yearly?
5. For any Guardian, what is the most likely proposal that \$10,000 would be given for?
6. Where are our most likely sources for Summer '73?
7. How might we intensify summer development in the social arena?
8. What federal agencies are now most receptive for funding our work?
9. What is the counterpart to the practicum in the social funding arena?
10. How might we mount and effectuate a 1 million capital funds drive?
11. With anticipated demonstration projects on the North Side, what would constitute an effective proposal document?
12. What would be our most effective use of the guardian network?
13. How might the LENS course be effectively used to foster large grants?
14. Where are our most fruitful geographical clusters of social contacts across the continent?
15. How might we best use our Chicago clout to unleash corporation monies across the continent?
16. What corporation or foundation would you like to spend the next eight weeks tracking for a large grant?

- IX. WE RECOMMEND THAT AN ADEQUATE SYSTEM OF FOLLOW-UP BE CREATED AND IMPLEMENTED WHICH WILL NURTURE AND SUSTAIN PATRONS.
1. Get on timeline for Region.
 2. Regional Development Coordinator responsible.
 3. Keep patron informed through newsletters and/or nurture calls.
 4. Coordinate with Base and model.

We recommend that an experiment be initiated whereby area Guardians share responsibility with Symbolic Centrum for raising funds from Foundations, Corporations, Government, and related institutions in each area. The intent would be a network of Guardians throughout each area that would work with Symbolic Centrum in providing data, contacts, and liaison; assisting with the preparation of sophisticated imaginal materials, proposal writing and nurture of prospective sources; all enabled by internal accountability. This recommendation envisions broadening the Guardian's role from advisory to direct participation in the activity of Capital Funding.

- I. IT IS RECOMMENDED THAT CONCISE HIGH QUALITY, IMAGINAL CALLING DOCUMENTS WHICH PRESENT AN AUTHENTIC E.I. IMAGE BE PREPARED UNDER SEVERAL SECULAR NAMES.
 1. Research existing E.I. material.
 2. Prepare photograph which illustrate signal projects and education programs.
 3. Professional writers--illustrators to design and prepare final documents.
- II. PREPARE MATRIX OF DATA AND STORIES FOR USE BY AREA DEVELOPERS, FROM EVERY POSSIBLE PERSPECTIVE: NEED, INTEREST, GEOGRAPHICAL AREA, SELF-UNDERSTANDING, AND ISSUE: WITH A SAMPLE PROPOSAL FOR A HYPOTHETICAL INSTITUTION FROM THIS DATA.
 1. Collect data.
 2. Design matrix for holding data.
 3. Store data in this retrievable form.
 4. Prepare sample proposal.
- III. CONSIDER USING ALTERNATE SECULAR NAME IN INSTITUTIONAL FUND RAISING.
 1. International Training Institute.
 2. Institute for Cultural Studies.
 3. Guardians.
- IV. IT IS RECOMMENDED THAT THE RESPONSIBILITY FOR CAPITAL FUNDING WILL BE SHARED BY SYMBOLIC CENTRUM AND MOVEMENT GUARDIANS. THE GUARDIANS WILL SET AREAL GOALS AND THROUGH REGIONAL STRUCTURES WILL CREATE AND IMPLEMENT THE MACHINERY NECESSARY TO MEET THE GOALS.
 1. Areal Movement Guardian meeting to determine goals.
 2. Symbolic Centrum creates a capital funds proposal document.
 3. Guardians in each region assigned to gun capital funding in conjunction with Symbolic Centrum.
- V. CREATE AT AREA LEVEL SPECIFIC PRESENTATIONS USING THE WISDOM FROM THE CORPORATIONS AND FOUNDATIONS ON ISSUES IN WHICH THEY ARE INTERESTED IN ORDER TO TAILOR OUR PRESENTATIONS TO THEIR NEEDS.
 1. Do research on foundations and corporation givers stated arenas in their charters and publications.
 2. Keep alert through business news stories on corporate problems and activities.
 3. Keep alert to news of rational trends which match our concerns.

4. Match up gathered data on corporate needs to determine compatability with our programs and emphasize those areas.
5. Interview knowledgeable corporate executives concerning the corporate concerns.
6. Fund and use key phases that speak the language of the corporation being addressed.
7. Search out from key contact what is needed in the way of documentation in a proposal.

VI. CREATE A TEMPORARY METRO CAPITAL FUND TASK FORCE FOR THE GATHERING OF DATA ON LOCAL CORPORATIONS, FOUNDATIONS AND OTHER INSTITUTIONS.

1. Metro Guardians decide on key corporations and data required.
2. Create list of RS-I grads, LENS grads, and friends.
3. Have contextual meeting to enlist their support (Invite 75 people and expect to get 20.)
4. Provide for spirit nurture of group.

VII. IT IS RECOMMENDED THAT SYMBOLIC CENTRUM AND THE MOVEMENT GUARDIANS CREATE AND MAINTAIN A CONTACT NURTURE PROGRAM FOR THE PURPOSE OF SUSTAINING A CONSCIOUS MOVEMENT IMAGE BEFORE CORPORATION, FOUNDATIONS, GOVERNMENT AND RELATED AGENCIES.

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IN-KIND INTENSIFICATION

Increased program demands require acceleration of the In-Kind contributions system, so that self support funds are available for other uses. Knowing that every product or service is a potential IK contribution, we face the task of accelerating IK to eliminate or reduce current purchases. Methodologically this means penetrating and developing the patronage networks of 4 or 5 key industries to break-open sustaining gifts. Also, this means procedures to locate and obtain the frequent "tone-shot" opportunities as they materialize.

1. How do we crack open key industries for sustaining contributions?
2. How do we tap sources of obsolete and stock piled products?
3. How do we obtain bankruptcy and liquidation goods?
4. How do we obtain goods as tax break and tax shelter advantages for donors?
5. How do we as the consumer use our buying power to encourage IK gifts from suppliers?
6. How do we obtain non-professional services as donations?
7. How do we sell demonstration projects as IK recipients?
8. How do we use established contacts for opening sustaining contributions?
9. How do we obtain professional lobby support to crack open major industries?
10. How do we obtain free use of professional services?
11. How do we obtain furniture and equipment for Centrum?
12. How do we get construction services donated?
13. How do we use trade and professional associations to break open sustaining contributions?
14. How do we free up contributions for global operations?
15. How do we obtain freight and travel gifts?
16. How do we maintain Centrum on a continuing IK basis?