

# HIA Interim Grant Report: The Financial Activist Playbook

June 25th, 2021

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## Progress to Date

- Research
  - Completed 250+ hours of research and documentation;
  - Hired research intern Sefa Santos-Powell to support interview transcriptions and historical content;
  - Participated in popular education courses and learning opportunities, such as on [Measuring Social Impact](#) (Mills College), [Community Study Group](#) (Cooperation Humboldt), and [Economic Activism Summer School](#) (American Friends Service Committee / Investigate).
- Production
  - Drafted chapter content and interviewee strategy per each of the eight core chapters;
  - Refined strategy to include a participatory donation pool for book contributors;
  - Confirmed [Hope Newsome](#) as lawyer to review final draft for compliance; ○ Began partnership with [Jordan Sanchez](#) of IDEO.org to implement human centered tools within each chapter, as well as constructed Branding / Design RFP to circulate in designer search;
  - Joined [The Justice Collective's](#) bi-weekly writers room.
- Marketing

- Launched [crowdfunding campaign](#), allowing the first 50 supporters to invest in the book production and receive a free PDF of the book once completed and access to updates;
- Presented the book overview in hour long presentations to five organizations to garner interest ([Too Good to Go](#), [Symbio](#), [Oakland Rotary Club](#), [Financial Feminists](#), [Apple](#));
- Received recognition for the book from [Teen Vogue and Omidyar network](#); ○ Set to present the book project at Humanity in Action's John Lewis Fellowship conference on July 10th, 2021.

## Upcoming

### On track for March 2022 –

- Research
  - Assemble and run a focus group to test user-friendliness of accompanying financial activists tools, via partnership with [The Bloom](#) and the [Just Economy Institute](#) cohort for financial activists (February 1);
  - Take the Series 65 (Unified Investment Advisor Law Exam) to limit necessary disclosures in book content (December 2021).
- Production
  - Secure publisher and editor (pursuing [Berrett-Koehler](#) as top choice) August 1;
  - Finalize interviews (20 participants) and first draft of book! (December 2021); ○ Choose and hire designers from local BIPOC design collective (currently choosing between three), to finalize graphic design and collateral branding (January 1).
  - Edit and publish version of the book with the help of publishing house, send PDF to “early investors.”
- Marketing
  - Build a landing page for the book on [realmoneymoves.org](#), which will include bonus content such as printable versions of the tools, audio of the interviews, press, and link to order (March 1);

- Send news of the book release via [Candide Group](#) newsletter (4,000 subscribers), [the Bloom](#) (2,000 subscribers), and the Humanity in Action community;
- Be available for media opportunities and book talks, starting with outlets who have already shown interest in covering my work (such as Teen Vogue, [Impact Alpha](#)).

### **Objectives and Impact:**

While the timeline for the book's release has extended (from November 2021 to March 2022), the objectives set out at the beginning of the grant period remain the same. The creation of the playbook will address the current lack of access to easy to understand, easy to use financial strategies — like how to sustainably invest in Black and Brown communities, how to leverage economic people power, how to vote with your dollars — in the fight for racial equity. The project will consist of producing and publishing an interactive playbook, which will coach individuals through concepts / modules that further racial equity. This in-depth book will be informed by the wealth of knowledge from my community and include curated interviews from BIPOC grassroots activists, social entrepreneurs, impact investors and movement leaders.

As a tangible product of the larger financial activist ecosystem, this project will primarily leverage educational resources to contribute to (and spur further) advocacy, strategic organizing, and blended capital strategies such as investing and sustained giving to BIPOC organizations. The human centered design of this book will also implement storytelling and arts as integral to the effectiveness of the content. In many ways, as someone relatively new to this movement, I will be learning as I go through the research and development of these resources, and so all concepts will be introduced with “entry-level” explanations.

Please refer to the appendix for additional information, including impact thus far. Jasmine

Rashid. HIA Interim Grant Report. 3

## Use of Funds

### Spent:

- \$250.00 — Measuring Social Impact workshop. *Learned effective strategies for presenting social change metrics and practices in SMART (Specific, Measurable, Achievable, Realistic, and Timely), and memorable ways.*
- \$17.55 — Expert Talk: Book Publishing for Thought Leaders. *Learned how to write a compelling book proposal and approach agents, publishing houses, and editors.* ● \$25.44 — BOOK: *Letting Go: How Philanthropy and Impact Investing Can Do the Most Good by Giving Up Control.*
- \$9.57 — BOOK: *No Planet B: The Teen Vogue Guide to the Climate Crisis* ● \$9.99 — BOOK: *The Food Activist Handbook.*

### Pending budget items:

- \$1,000 — Research intern will receive \$500 on September 1 2021, and \$500 on November 1st 2021.
- \$30 — Transcription software
- ~\$10,000 — Design payment
- TBD, likely \$1,000 — interviewee donation pool
- TBD, marketing

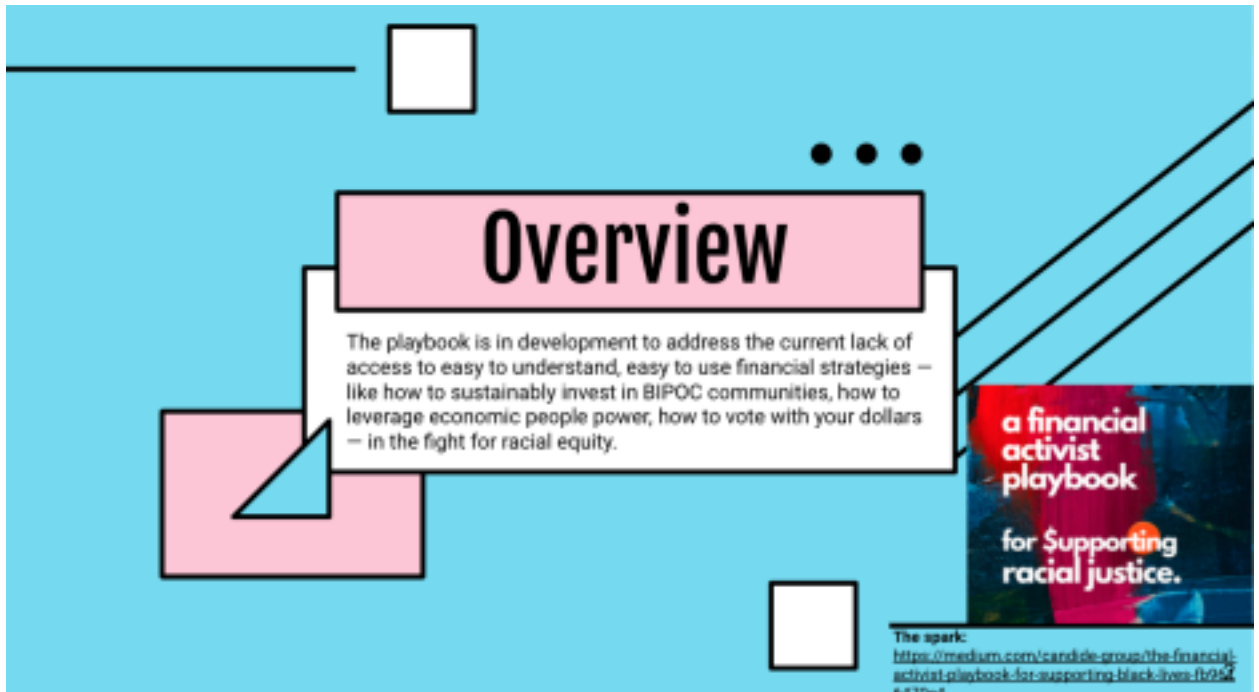
Additional funding received:

- \$5,000 from Teen Vogue x Omidyar Network “Reimagining Capitalism Contest” — unrestricted grant
- \$4,239 in crowdsourcing (via Action Network)

*\*will reassess need for additional fundraising once I receive contact quotes from the design team*

Jasmine Rashid. HIA Interim Grant Report. 4

## Appendix



## Early impact

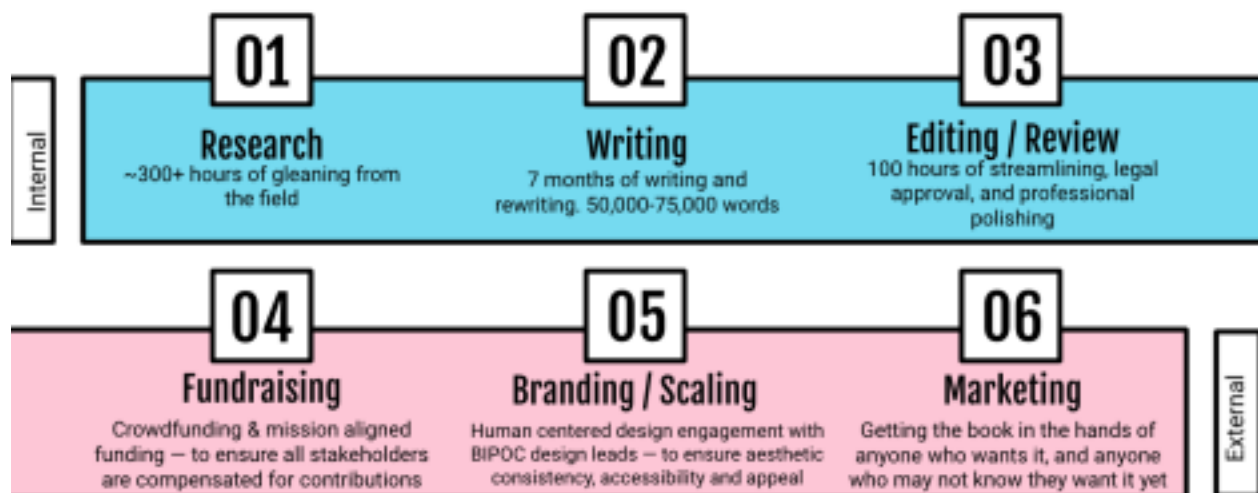
*In some preliminary feedback on the Medium post (without any advertising or strategy behind it), I've heard:*

- from a bookstore that was inspired to “audit of all of our current vendors, partners, and financial activity and track our supply chain to determine who we are and are not financially supporting.”
- from a strategic coaching firm who decided to move their banking partner to a community bank
- from a major tech corporation that is now exploring “social justice alternatives for their 401(k) plan”
- from low-income students who are leveraging their college’s endowment and alumni network to call for greater racial equity policies
- from countless friends and strangers alike, who are deepening their personal commitments to spending their financial and social capital with Black businesses.

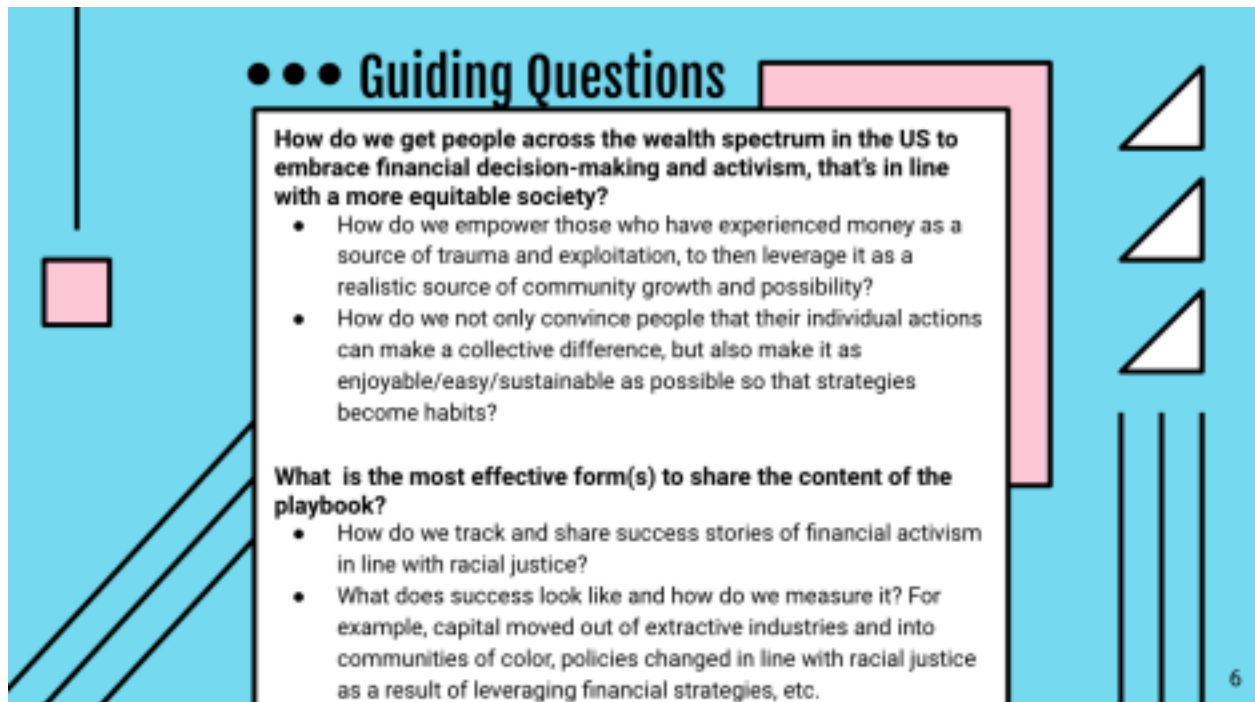
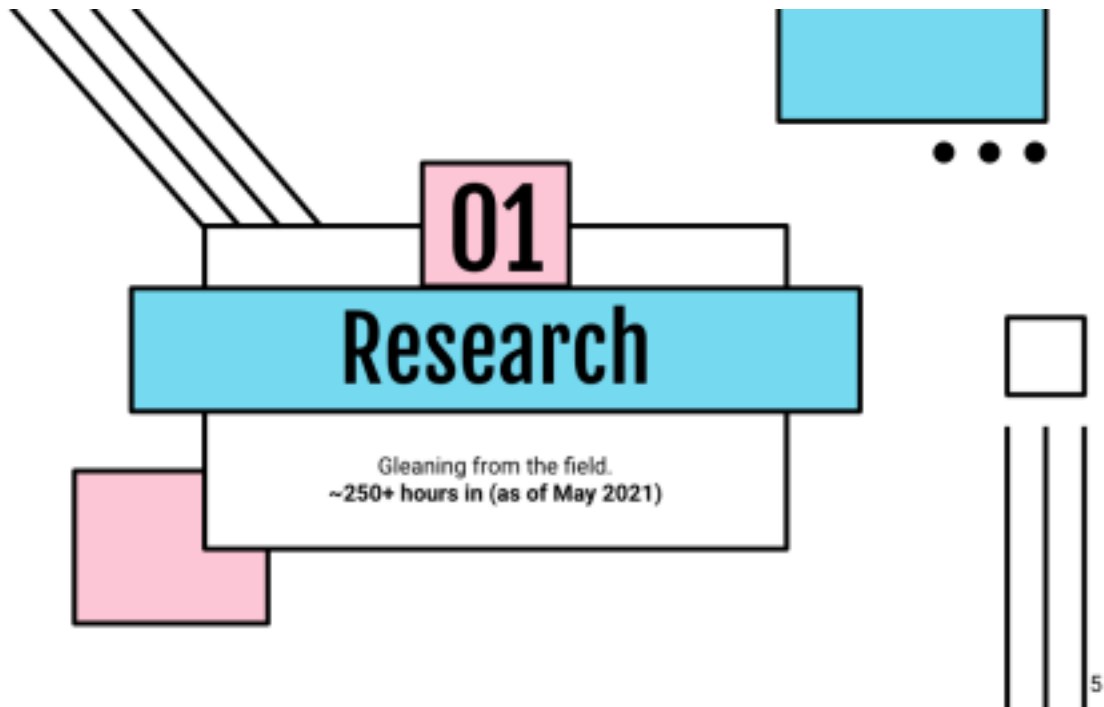
*These are the types of real impact stories we intend the physical playbook to elicit, tenfold.*

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## Work Buckets



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# Reading List



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# Non-traditional resources



NEXT  
ECONOMY  
NOW

TAKE ON  
WALL ST



**Community partner conversations**  
 At least 15 per archetype, roughly 50 hours of recorded interviews

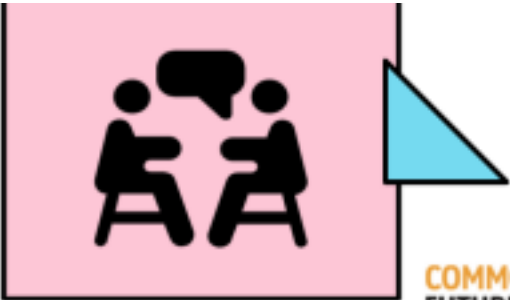
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## Audience Archetypes

The socially conscious, "every-day American"

Activists new to financial activism

Financial activists (primary ecosystem)



## Additional Research Assets



**Webinars, Panels  
Podcasts, and  
Additional Content in  
the field**



**Popular Education  
Course**

10 week study group with  
Cooperation Humboldt



**Research Intern**

Sefa Santos-Powell – graduating  
senior with a special focus on  
history and racial capitalism

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02

**Writing**

And rewriting. And rewriting some more.

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## Core Financial Activist Strategies (Chapters)

*Intro: What's your money story?*

1. **Divest** from the dirty
2. **Invest** in community
3. Claim some **shareholder** power
4. Own your **taxpayer** status
5. Treat yourself – **spend** sustainably
6. Break up with your big **bank**
7. Refine your **donating** rituals
8. Embrace **mutual aid**

*Conclusion: Your new money story*

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## Content Overview



### Getting Personal

Encouraging people to begin with understanding their own "money story"



### Historical Context

The "how did we get here" to inform our "where are we going"



### Financial Activist Strategies

Each module will have a mini interview, case study and accompanying tool/exercise



### Lexicon

Breaking down the terminology

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# Writing Accountability Partners



**Writer's room**  
Convened by TJC



**Pro-bono coach**  
Nicole Lopez-Conti

