



WINGS*Forum* 2010

INNOVATION and IMPACT:

The Role of Grantmaker Associations in Changing Society

CONFERENCE REPORT



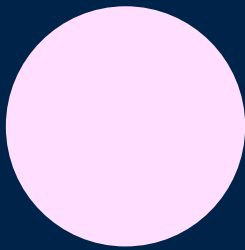
WINGS
WORLDWIDE INITIATIVES
FOR GRANTMAKER SUPPORT

CONTENTS

Conference Summary	1
Effective Philanthropic Collaborations	12
Innovations and Capacity Building	15
Improving the Legal & Enabling Environment for Philanthropy	19
WINGSForum Marks the Launch of Two New Reports from WINGS	20
Interview with Stefania Mancini	22
Interview with Barry Gaberman	24
Interview with Fernando Rossetti	26
Interviews with Marissa Camacho and Helena Monteiro	28
Acknowledgements	30

WINGSFORUM 2010 COMO, ITALY





INNOVATION AND IMPACT: THE ROLE OF GRANTMAKER ASSOCIATIONS IN CHANGING SOCIETY

Introduction

Between 18 and 20 November, WINGS members and other philanthropy organizations (non-WINGS members) gathered in Italy for the four-yearly Forum. Over the two and a half days, over 160 participants from 45 countries explored some of the critical preoccupations of current philanthropy: how to maximize and assess the effect of donors' work; how to form alliances across sectors in order to furnish solutions to problems beyond the scope of any one sector; and how to influence politicians and legislators to make changes that might give lasting effect to philanthropy's contribution. Most important of all, what is the role of grantmaker associations in this work? This report gives an account of their discussions.

The 2010 Forum came at an important time, not only for philanthropy, when the financial crisis and the increasing severity of some of the most pressing global problems have thrown these questions into higher relief, but also for the future of WINGS. It is a time of change for WINGS. It has decided to discontinue the practice of rotating the secretariat, and from next year will base itself in Brazil until further notice, which will produce a greater degree of continuity. Funding for infrastructure, however, is at a premium, with fewer donors willing to fund it. As more than one speaker pointed out, new ways of financing such organizations and new methods of working need to be devised.

The main narrative of this report follows the discussions which took place in the Forum's plenary sessions. In addition, there are separate accounts of two of the four themes selected for breakout sessions that ran through the Forum and of several other workshops or sessions of special significance. There are also interviews with key figures associated with WINGS, with the hosts and sponsors, Assifero, and with some of the conference speakers, as well as reactions from a number of Forum participants from around the world.



Day 1: Thursday 18 November
Opening plenary



The most important component in philanthropy, declared Felice Scalvini, president of Assifero, is the exchange of ideas and experiences. Bringing together like-minded people can solve problems peacefully and take humankind forward in friendship and partnership. This was his message of welcome to the delegates at the opening plenary of the 2010 WINGForum which Assifero (Association of Italian Foundations and Grantmaking Organizations) co-hosted with ACRI (Association of Italian Foundations and Savings Banks) and the Como Community Foundation.

The Forum set out to address four themes through tracks which ran in concurrent sessions throughout the gathering:

- The legal and enabling environment for philanthropy
- Effective philanthropic collaborations
- Engaging strategically with policymakers
- Innovation and capacity building



Accounts of two of these themes are presented below.



Following the opening remarks by Ruth Jones, co-chair of the Forum committee, and Felice Scalvini, WINGS chair Fernando Rossetti sketched in the background to these themes. Referring to the Forum as a 'mini UN' and a 'hub of hubs', he remarked that it was taking place at an important time for both WINGS and philanthropy in general. There is a need to strengthen the infrastructure of philanthropy but, at the same time, the number of funders willing to pay for this is diminishing. On the other hand, governments, often under financial pressure themselves, are beginning to look more favourably on philanthropy, and there are new players in the field such as the Gates Foundation, while the emerging or so-called BRIC economies are beginning to flex their muscles.



In addition, the WINGS secretariat is moving to a new, long-term home in one of these economies, Brazil. What will be the role of this 'hub of hubs, this network of networks' ('Does your mother understand what you do?' he asked jokingly. 'Mine doesn't')? Delegates would have the opportunity to discuss and inform this at a session specifically set aside for the purpose at the close of the second day, but in part WINGS' role is clearly both to influence and reflect the development of global philanthropy. Global platforms are crucial to doing this.



This is the reason for WINGS' involvement with the recently launched Global Philanthropy Leadership Initiative (GPLI), a joint venture between the Council on Foundations (CoF), the European Foundation Centre (EFC) and WINGS. The GPLI convened the leaders of 20 or so of the major foundations working globally to analyse three of the main challenges facing global philanthropy, challenges which mirror the issues under discussion at this Forum: the legal environment; collaboration; and engaging with multilateral organizations and governments. The environment for philanthropy and for philanthropy infrastructure organizations is changing, he concluded. The new situation presents difficulties, but it also offers opportunities.

GPLI

Steve Gunderson of CoF took up the theme of the GPLI. Global philanthropy is at an extremely dynamic stage, he said, with 'exploding numbers' of small foundations who want to work at a global level but don't have the capacity or the know-how. CoF has taken the initiative and approached both the EFC and WINGS with a view to launching a two-year leadership project, the GPLI. WINGS should take the lead because it has a global reach that neither of the other two organizations can match. The other two partners, he said, recognize that WINGS doesn't have the resources to lead but, he added, 'we are committed to building it' so that it can.





There are a number of steps that need to be taken. In terms of the legal environment, more research is needed. The Initiative needs to work out ways of capitalizing on existing treaties and protocols and using the Global Giving Index to good effect. On the question of collaboration, the keys are building institutional collaboration and using projects to create examples of successful collaboration. Finally, on the issue of engaging policymakers, the latter are more than ready to meet them half way, he said. Organizations like the World Bank and the UN are looking for partnership with foundations and looking to them for innovation. He finished with an African proverb, which he commended to the assembly as a motto for the Forum: ‘Go quickly, go alone. Go far, go together.’ WINGS, he said, is a good place to start.

‘What have you done to engage young people?’

First of the guest speakers was Adam Smith of the Foundation for Young Australians, who reminded the Forum that new blood and new ideas are as important in philanthropy as they are in any other endeavour. There is a preconception that young people are interested only in themselves, which is not true. They might not think about philanthropy and making change in the same terms as WINGS delegates but they can be passionate and creative about it.

His own experience of establishing the Foundation for Young Australians and making grants to young people’s organizations showed that when you put accountability and responsibility into the hands of young people, you can create a new generation of leaders. Where else are they to come from? You also need to change the systems that condition their lives. Young people are starting their own movements because they find the existing ones frustrating. They either aren’t moving at the right pace or they don’t speak to young people. Sitting on the board of the International Youth Foundation, he said, had shown him that, under the right circumstances, young people can be advisers, activists, board members, grantmakers and thought leaders.

His main message to the Forum was in the form of a challenge: “what are you doing and what can you do to engage and equip young people to make change around the world?”

The information technology revolution means that structures for doing so are changing rapidly. While it isn’t a given that we must use this or that social medium, Twitter for example, they clearly aren’t going away and are probably the most powerful tool for young people to communicate and to learn.

What did you get out of this WINGSForum?

Luma Hamdan, Arab Foundations Forum

“The meeting brought the world together under one ceiling, and it felt like a family atmosphere.”

Nelson Colon, Puerto Rico Community Foundation

“Generally, I think bringing together support organizations to have a discussion about support is worthwhile.”

Plenary: Italian philanthropy's role in changing society



Why are civil society organizations important, asked Professor Stefano Zamagni, president of the Italian Charity Commission, opening the second plenary? Because the major determinant of national development is not natural resources or geography, as once thought, but what he called the 'cultural matrix' –based on the values, traditions and social norms which underlie a society and civil society organizations, whatever their declared aim.



Trust, for instance, is fundamental to the operation of society and the economy. Without a culture of reciprocity, it would be impossible to impose legal norms. CSOs generate and regenerate these things and this is the basis on which they should be evaluated, he suggested, not on their efficiency. There is a continuous interplay, he acknowledged in answer to a question from the floor, between efficiency and effectiveness, but if he had to choose between two projects in allocating funds, he said, other things being equal, the one that was better at trust creation would get preference.



The question to answer, he said, is how much your organization has contributed to what you are trying to achieve. Of course, it is a qualitative value, but quality can be measured, he insisted, and he set this out as a task for WINGS to undertake. Such a measure, he said, should start in an empirical way, drawing up criteria then seeking consensus on them. Most importantly, any framework should be adapted to the world it is meant to comprehend, not vice versa. In other words, the metric should be adapted to local conditions, not imposed on them.

The Italian foundation sector has undergone something of a boom since the 1990s, said Stefania Mancini, vice president of Assifero, for reasons which include the outsourcing of services from the statutory sector, the relaxation of legal forms and the growing needs of local communities. This, together with the financial crisis, has put the Italian foundation sector in the spotlight. The resultant surge in poverty has given rise to needs that the increasingly straitened state cannot meet. Foundations are therefore under pressure from non-profit organizations (NPOs) on the one hand and local authorities on the other to provide increased resources.

Helping people to express their humanity

The task for Assifero, she said, is to stimulate increased cooperation and the pooling of resources both within the sector and between the sector and NPOs and local authorities to develop the sector's infrastructure and develop pertinent assessment tools. (As an example, she cited a mental health institution which was opening that day in Rome which had involved the collaboration of four Italian foundations.) Above all, she said, Assifero needs to foster a vision of what institutional philanthropy should be. Her own view was that its purpose should be 'to fund activity to help people express their humanity'.

Is Italy a giving society?, wondered Rob Buchanan of APPC who was moderating the session. Yes and no, said Professor Zamagni. The idea of giving by helping or providing goods is well established, he said, but the idea of giving money that isn't for the immediate relief of some visible ill is a new one.

Day 2: Friday 19 November

Plenary: The Importance of Philanthropy Research



Philanthropy research is important, declared Jane Humphries of the WINGS Advisory Committee who chaired this session, because philanthropy needs to take itself seriously. And for it to be able to do so, good data is needed.



She then introduced the authors of two new reports WINGS has recently published, Barry Knight of CENTRIS in the UK, who compiled the 2010 Community Foundations Global Status Report, and Paula Johnson of the US-based The Philanthropic Initiative, who researched and wrote Global Institutional Philanthropy: A preliminary status report. Outlining the trends highlighted in their research, Knight described community foundations as a growing field, especially outside North America, while Johnson dwelt on the difficulty of gathering data on global institutional philanthropy, especially in some regions and countries, and the near impossibility of comparing what data there is across countries. Their presentations are dealt with more fully in the article on page 20-21 of this report.



'Information needs to be as fast as possible and as good as possible'

WINGS has the reach and the credibility to support reports like this, remarked Brad Smith of the Foundation Center. But why is it so difficult to collect data on philanthropy? Using a series of slides to good comic effect ('this is a typical foundation office,' he said, as a woodcut of Johannes Gutenberg at his printing press appeared on the screen behind him), he illustrated the development of institutional philanthropy and its heterogeneity. The field needs data standards, he said. We need to know who gives money, who gets it, how much, who benefits? One of the chief problems, he argued, is the lack of an agreed classification system. There is, for example, no agreed definition of the terms 'Global South' or 'developing country'.



He then introduced and explained Philanthropy In/Sight, an interactive mapping tool developed by the Foundation Center. Using google maps, In/Sight allows users to find where and on what grants by US foundations are spent (in great detail). They can also find patterns of giving and funding relationships and overlay grants data with demographic and thematic data sets to show where philanthropy has made an impact and where needs still exist. It is important, he said, to have an interface that allows users to 'get into the information'.



What next, he asked? Better data is needed. The maps show where the grants went but not how wide their benefits were spread. We also need faster data, he argued. Philanthropy is way behind the digital revolution and means are needed for foundations to transmit data faster. The sector also needs to combine data. People are interested in issues, he said, not in philanthropy, so 'let's go after data through issues'. Information, he concluded, 'needs to be as fast as possible and as global as possible.' Delegates have a big part to play here, for regional associations, he suggested, are the best way to get access to members' data. But better data doesn't necessarily mean more data, he cautioned in reply to a question – 'let's not collect data on absolutely everything'.

There is some movement in a related field, he said. The Aid Transparency Initiative has produced a common data standard for development aid, but this is too complex for philanthropy.

The session drew up a clear role for WINGS and other philanthropy networks in regard to data collection. Colleen du Toit of the Charities Aid Foundation South Africa said that members are always asking for a global picture, and for that you needed WINGS, which has a global reach. Though, she pointed out, donors remain reluctant to fund research. Caroline Hartnell of Alliance magazine said she had just come from the European Venture Philanthropy Association's conference and was struck by the fact that almost no one else at the WINGS gathering had been there. This is another network which could provide access to other sources of information, yet a gulf divides the two associations. Is there not some way of bridging it, she wondered? Clearly, building joint platforms and collaborations takes time and reaching out to all the networks and associations involved in philanthropy is impossible. However, as someone pointed out from the floor, the power of networks is that everyone doesn't have to be in all of them. WINGS should find out where its strongest links are and work on developing synergies.

Afternoon Plenary: Shaping Our Future: A consultation with WINGS Members

Perhaps one of the best attended sessions of the Forum was the Friday afternoon plenary which canvassed the views of members on the future direction of WINGS. With changes in the wind, WINGS faces a number of important questions about its future role and development: in what areas should its services develop? How should it position itself to play a leading part in the development of institutional philanthropy? And, perhaps most critical of all, how can it evolve a new, more self-sustaining means of operation? Current executive director Marissa Camacho and chair Fernando Rossetti set out the background to the discussion.

WINGS began ten years ago with the mission to support grantmakers' associations globally, said Camacho. At that stage, it adopted a policy of rotating the secretariat, which has been housed successively in Washington and Ottawa, Brussels and Manila. Its principal activities are capacity-building, through its peer learning exchanges, one-to-one exchanges and the provision of technical assistance; and the production of resources such as the Community Foundation Global Status Reports and the new Global Institutional Philanthropy reports (see page 20-21 for an account of these), a mapping exercise on the landscape of CSR and other materials. In the pipeline are principles/benchmarks for the development of community foundations and toolkits on sustainability and effectively engaging corporations.

Building a sustainable organization

One of the main questions for the future, however, is that of WINGS' long-term sustainability. There are a dwindling number of donors willing to support philanthropic infrastructure. Based on previous member consultations, two key decisions have been taken: first, to incorporate WINGS in the US to make it more effective (the US was chosen because of its favourable legal and fiscal environment. As Rossetti remarked, 'the US has the best legislation to make philanthropic money flow around the world') and, second, to stop the practice of rotating the secretariat and to settle in Brazil (see the interview with Fernando Rossetti on page 26-27).

In terms of sustainability, one of the options being considered is introducing membership dues. With positive feedback from those who responded to the WINGS survey, the coordinating committee members committed to be the first to pay membership dues, said Marissa. However, she stressed that this is a 'continuing conversation' and no decision will be made without consulting members on the details. One of the virtues of devising a new sustainable model for the organization is that it might help members make their own associations more sustainable.

No more dependence on big grants

Going forward, said Fernando Rossetti, the organization needs to develop new policies for governance in the areas of membership criteria and dues. In terms of programmes and services, WINGS is keen to maintain existing core activities and to develop new ones. These could include leadership initiatives like the GPLI, what he called 'WINGS 2.0' – a knowledge management platform which would feature greater use of webinars – and the launch of new affinity groups and clusters.

On the question of sustainability, one thing is clear, he said. There should be no more dependence on big grants. Partnerships are one way ahead. WINGS is working in partnership with the Foundation Center to develop a network of information on foundations globally. Its partnership with AVINA and GIFE in Brazil, meanwhile, will provide it with a strong position in Latin America and create a global hub for philanthropy, based in GIFE's offices in São Paulo.



However, he stressed, ‘we need your input’. About halfway through the plenary, participants were asked to break out into roundtable discussions on how to move forward in the areas of the Forum’s four ‘threads’: the legal and enabling environment; collaboration; innovation and capacity building; and engaging with policymakers. To focus the discussion, each table was asked to produce three ideas at the end of the period of deliberation and given three minutes in which to outline them as briefly as possible. Among the great variety of ideas that came out of this session were the following:

Legal and enabling environment

- Production of a toolkit that would include the various elements needed to produce a favourable environment for philanthropy, such as principles, model laws and strategies for achieving them.
- Creation of an information exchange platform.

Collaboration

- Peer learning with a view specifically to facilitating collaboration.
- Joint fundraising so that all regions can gather data for future editions of the Global Institutional Philanthropy report.
- Creation of a group to gather data and to coordinate what expertise exists within the WINGS membership.
- Creation of country or regional hubs to coordinate information and mobilize members in their area.

Innovation and capacity building

- Devising a means of sharing innovations that work.
- Empowering local associations to be experts on philanthropy in their area by feeding to them knowledge gathered globally. In return, information coming back up the chain, so to speak, to WINGS from local associations would strengthen WINGS’ position as an authority on institutional philanthropy.
- Job-shadowing and mentoring programmes to exchange skills and knowledge: the best way to strengthen an institution is to strengthen its management.
- Creation of ‘e-hubs’ in places where there are the greatest concentrations of members.

Engaging with policymakers

- Mobilizing members to work out how to do this, and encouraging them to do likewise with their members.
- Developing an agenda, which must come from the ground up, for dealing with policymakers.
- Pursuing links with the UN.
- Presenting WINGS as a conduit through which bilateral and multilateral organizations can engage with institutional philanthropy.



What did you get out of this WINGSForum?

Laura Dittel, Slovak Donors’ Forum

“I think it’s a great opportunity to meet people doing the same things in different parts of the world and it’s a great opportunity for me to learn about issues which are difficult to deal with in other environments.”

Chet Tchozewski, Global Greengrants Fund

“WINGS is important to environmental grantmaking because it enables us to plug into a global network of foundations and donors with common interests.”

Robyn Scott, Philanthropy New Zealand

“Meetings like this are about the art of possibilities and the tools and resources for transforming possibilities into actualities.”

Day 3: Saturday 20 November

Plenary: Engaging with Policymakers Around Major Social Issue



Are there special ingredients for engaging successfully with policymakers and helping to move them on a major issue? This was the question Monica Patten of Community Foundations of Canada, who chaired the first plenary of the Forum's final day, asked the two presenters, Astrid Bonfield of the Diana, Princess of Wales Memorial Fund and Jermyn Brooks of Transparency International, to explore.

Campaign to ban cluster bombs – capitalizing on power and opportunity



Astrid Bonfield talked about the Trust's work as part of the Cluster Emission Coalition (CEC), a group of civil society associations that had come together to lobby for an international ban on cluster bombs. The peculiar odiousness of this weapon, she explained, is that it comprises a number of tiny 'bomblets' up to 20 per cent of which don't explode on impact. Instead, they lie around, small, shiny objects that naturally attract children, who suffer a high rate of casualties from this lethal military detritus.



An opportunity for the CEC came in 2007, she said, when Norway convened a group of states to work on banning these bombs. Following lobbying, the meeting took place in the Diana, Princess of Wales Memorial Fund's office. CEC had a seat at the negotiating table. During the 18-month process that followed, the CEC worked on a number of methods of publicizing and gaining public support for a ban, among them training survivors in media presentation. There were two important elements in the success of the coalition, she felt. First, it was highly disciplined. Not all of the parties to it shared all of each other's aims, but they focused on the main idea and maintained a united front during the negotiation process.

Second, as a grantmaker supporting the process, the Diana, Princess of Wales Memorial Fund was prepared to be extremely flexible. At critical times, it turned around some grants in 24 hours, sometimes to individuals as well as organizations.

Overall, she believed, philanthropy needs to take advantage of what means of power are accessible to it and what opportunities present themselves. It is a big mistake for grantmakers to think that they don't need to talk to anyone outside philanthropy. 'We don't have power,' she said flatly. Politicians who appear to be drafting or responsible for abhorrent legislation are not natural allies, but philanthropy needs to work with them if it is to achieve desired changes in policy. In order to do this, instinctive dislike or hostility thus needs to be suppressed. And you need to be prepared to press your advantage when unexpected opportunities occur. In the case of the cluster bomb campaign, such an opportunity arose when Israel bombed Lebanon, which led to an outbreak of revulsion among governments.

What if one of the partners is sabotaging a coalition, asked someone from the floor? It is not unknown for parties to agree to join in a negotiating process only to scupper it. Be ruthless, said Bonfield. Kick them out. You have to be clear about what the 'win' is that is on the table. This is what enabled CEC to present a united front.

What can delegates, as representatives of associations, do to persuade foundations to collaborate, asked Robyn Scott of Philanthropy New Zealand? Dr Bonfield held up the role of the Association of Charitable Foundations in convening the Woburn Place Collaboration in the UK as a model. ACF supports this through provision of its secretariat. Charity CEOs go to it and it is influential. It is a matter of convening rather than imposing a view, she said.

'Persistence and passion'

The experience of Transparency International (TI) taught many of the same lessons. Bribery and corruption runs through all countries, said Jermyn Brooks. This undermines aid and philanthropic efforts and creates huge inefficiencies. He talked about TI's efforts to enforce the UN Convention against Corruption signed in Merida, Mexico in 2003 – signed by 140 countries, but often not implemented, he said.

However, civil society could lobby for the implementation of unpopular treaties. TI, together with the International Chamber of Commerce, the Davos Forum and members of organizations signed up to the UN's Global Compact wrote to the CEOs of major multinational corporations to enlist their support in implementing the Convention and counted 35 supporters from their ranks. There is a coalition of 250 CSOs monitoring implementation of the Convention in 30 selected countries. They need the skills to be able to do this and to equip organizations working at the very local level to scrutinize local institutions. They therefore also need some limited

funding but, he stressed, the main role for philanthropy in this sort of initiative is in building coalitions and lobbying.

One of the barriers to greater philanthropic involvement in anti-corruption campaigns, he said, is getting donors to see that bribery and corruption impairs their effectiveness, too. Ten per cent of the medications funded by donations from the Gates Foundation do not reach their intended beneficiaries, he estimated. At first, the foundation wouldn't talk to TI, and it is still an uphill battle to get foundations to see the toll bribery and corruption takes on their work.

Also, building the capacity of local CSOs is a big obstacle, he acknowledged. The Extractive Industries Transparency Initiative in which TI is involved is an effort to get extractive industries to publish what they are paying to domestic governments in Africa so that CSOs can hold those governments to account for how they spend those funds. The initiative trains local CSOs to help them understand national budgets and how these transfer to municipal level. It is a big effort, but it is crucial to the success of the initiative.

What are the essential elements, asked Monica Patten? First, said Jermyn Brooks, persistence and passion. TI and its allies won't be diverted, he said. Like Astrid Bonfield, he stressed the need to work through coalitions. 'You can't make change alone,' he argued. These coalitions need to be credible, he reminded delegates, therefore they have to be completely transparent.

But, he warned, the work does not end with ensuring implementation of the Convention. States might have good laws, but if the judiciary is not independent and the police are corrupt, such laws will be unenforceable.

'Don't be frightened of leading'

What should WINGS take from this? 'It's not OK for us not to change things,' said Astrid Bonfield, contrary to what many foundations think. She challenged WINGS to take leadership in the way that the EFC, for example, has done on the European Foundation Statute, and not to get too focused on service to members. 'Don't be frightened of leading,' she urged, and don't worry about dissent. 'You can't keep everyone happy.'

Leadership is also needed in the matter of ethics, said Olga Alexeeva of the Philanthropy Bridge Foundation – to which Bonfield suggested that the EFC Principles for Accountability might be a good starting point for a global set of principles. Global is the operative word, said Atallah Kuttub of the Arab Foundations Forum. WINGS could push for a set of principles that are truly global so that the values of the Global North aren't imposed wholesale.



What did you get out of this WINGSForum?

Johanna Hendricks, SACOFA

"For me, the highlight of the Forum has been seeing the manner in which WINGS wants to cooperate and work with its members."

Pilar Hernandez, Association of Oil Foundations, Colombia

"I learn a lot, because there is the opportunity to share with peers, not only from South America but from around the world."

Closing Plenary: The Barry Gaberman Lecture

'Woody Allen once said, "95 per cent of life is showing up",' said Barry Gaberman introducing the second lecture named in his honour. He therefore thanked this year's lecturer, Dr Peggy Dulany of the Synergos Institute, for doing so but, he remarked, she never simply shows up. You always get the best of what she thinks and what she has to say.

Before handing over the podium to her, however, he offered some thoughts on the funding of philanthropic infrastructure. Few foundations now invest in this, he said, and of those that do, most do so grudgingly. Of the principal funders, only the Mott Foundation remains convinced of the merits of funding infrastructure. 'Hopefully, we're at the bottom of the cycle,' but, he said, he believed infrastructure organizations will require 'a new business model', effectively reiterating what Fernando Rossetti said at the start of the members' consultation about the end of big-grant dependence.

Dulany herself led off by remarking that Synergos has become more and more of a support organization. When Synergos began, there was a widespread lack of understanding of strategic philanthropy in most of the areas it worked in, and infrastructure and support at community level was virtually non-existent. Synergos has therefore concentrated on donor education. It has also helped shift giving towards community foundations.

The venture capital of the social sector

But why is philanthropy important? Philanthropic money is the venture capital of the social sector, she argued. It can take risks and lead the way and it can bring in other money. Philanthropy also provides a number of other important things: first, convening: foundations have access to people of influence, skills and ideas. They can bring them together to form more than the sum of their parts.

Second, networking: foundations bring together the like-minded within their own sector and across the others. Third, building bridges: you need to have credibility within your own constituency to do this well. You also need a particular set of skills, all of which philanthropy support organizations are instrumental in teaching, among them the ability to listen, which is often not as simple as it sounds; empathy; and the ability to create what she called 'chains of trust'. Bridging leaders need to have their feet firmly in their constituency but the ability to reach out beyond it. They also need to have relatively low 'ego needs', the ability to suppress personal desires for the sake of a common purpose, something that echoed what Astrid Bonfield and Jermyn Brooks said in the earlier plenary.

Bridging leaders

As examples of such bridging leaders, she mentioned Graça Machel and Wanda Engel. Graça Machel, through political connections, work with civil society, and credibility in both Mozambique and South Africa, has helped achieve recognition for civil society in Mozambique and a degree of empowerment for African women through the women's networks she supports. Wanda Engel has been involved in favela education in Brazil, founded a partnership to address the rights of children, and gone on to posts at local and national government level and in multilateral institutions. She now heads a corporate foundation. Again, her credibility across all sectors has enabled her to pioneer the now widespread bolsa familia programme and an educational reform in Brazilian schools which is attracting state interest.

Finally, foundations are important to the promotion of partnerships. Some of the most pressing problems are too complex for one sector alone to solve. Foundations are good at cultivating the informal relations that create the trust which enables partnerships to function. To build successful partnerships, she urged, allies in every sector and long-term commitment to the partnership are necessary.

Redressing the balance

In all of these areas, foundations have an important contribution to make. But, she stressed, capacity-building is necessary if they are to do this well, and that is where philanthropic support organizations are vital. However, they also have a deeper role. Conflict and war are increasing, and pollution and environmental degradation have reached a critical level. The gulf between the rich and poor is widening, and those on the bottom side of the divide are more aware of it. In short, the world is out of balance, she declared. The masculine characteristics of achievement, domination, exploitation and conquest have come to take precedence over the feminine qualities of nurturing and preserving. Neither set of qualities, she stressed, is wholly



good or wholly bad per se; the crucial thing is that they should balance each other. The present tilt in favour of the masculine qualities is destroying the planet, she said.

What can we do? Organizations must push back against the tilt. We all of us need to re-evaluate the feminine qualities and how they can be expressed in our work, and to restate the values of empathy and solidarity. Synergos, for example, takes groups of donors on retreats where they spend time both with each other and alone. This produces trust among the group and often leads to joint projects, which are scaled up by institutions. 'We are the bridges,' she said, 'we reflect and allow others to reflect, to reach out across the sectors and produce joint solutions.'

Starting from oneself

We can't leave restoring the balance to political and economic leaders. Civil society leaders must empower citizens to come to the table and to make their voices heard. But first of all, a personal transformation is required to bring uppermost in ourselves the virtues of tolerance, faith, trust and compassion. Moreover, we need to instil these into the coming generation, by reaching out into schools, communities and, most of all, families. 'We can't permanently banish the darkness in ourselves or in our world,' she concluded, 'but we can increase our own light.'

As the audience drew breath, Marissa Camacho, who will soon step down as executive director, unveiled a series of photos from this Forum and from the previous ones stretching back to 1998 as a symbol of the seamless transition of WINGS' leadership from her to Helena Monteiro and from the migratory habit of its secretariat to a more permanent location.

The proceedings drew to a close with remarks by Giuseppe Guzzetti, president of Fondazione Cariplo and ACRI, and local musical ensemble Baule dei Suoni, both of whom proved irreplaceable in their different ways. Guzzetti said that the Forum title touches on the most important elements

in philanthropy throughout the world. He expressed his admiration for WINGS' work on three counts: its support for innovation in philanthropy; its promotion of collaboration among organizations; and its work in supporting community foundations. Like most of Europe, he said, Italy has looked to the state for the provision of its social needs and the remedy of its ills. No longer. We are now feeling the surge of a communitarian wave and there is a strategic role for philanthropy to play in partnership with government, the non-profit sector and business, but this can be done only through new ways of working.

Finally, Musica Spiccia of the Baule dei Suoni, a mixed generation and distinctly individual-sounding orchestra, played music from Senegal, Eastern Europe and Brazil with a gusto which, despite two and a half days of intensive discussions, sent delegates away with a smile on their lips and a spring in their step.

And then...?

The Forum provided much food for thought. The debates evinced a clear need and desire for a global organization such as WINGS to represent the interests and work that philanthropy is doing and to engage with other global forums in the solution of problems that are increasingly global in nature. The need for WINGS to lead philanthropy was mentioned more than once.

In a very real sense, WINGS is entering a new phase – newly incorporated, with a new base and new methods of operation to be evolved, it can make its own future. That future must rest on a more sustainable form of the organization. As Fernando Rossetti remarked in the opening plenary, WINGS is a 'network of networks'. Like all networks, it depends on the trust engendered between its participants and their willingness to work together. Its ability to respond to the challenges that confront it will depend very much on the commitment of its members to WINGS and the commitment of WINGS to its members.





Effective Philanthropic Collaborations

The 'Effective Philanthropic Collaborations' track at the 2010 WINGS Forum looked at the role of grantmaker associations in encouraging collaboration, engaging with the ultra wealthy and communicating with key 'influentials'. It also included one session, on the Global Community Philanthropy Initiative, which was in effect a case study in collaboration and the difficulties thereof.

Role of grantmaker associations in forging more effective collaborations

Before discussing how grantmaker associations can help forge more effective collaboration, one needs to be clear why increased collaboration is a good idea. There are some global issues that should be addressed globally as well as locally, said Massimo Lanza of the Venice Foundation, in conversation with Kristin Lindsey of the US-based Council on Foundations, during the first session in the collaboration track. 'Imagine if all foundations could collaborate on an issue like peace, what they could achieve.' Another reason is complexity, said Lindsey. 'Climate change isn't just global; it's too complex to be within anyone's capacity.'

But collaboration isn't easy or straightforward, she warned, using the analogy of marriage. The fundamental belief about marriage, she said, is that doing something with someone else must be better than doing it alone. 'You have to give up some autonomy, and be willing to change, but it's still better to live with that other person.' A clear implication is that if collaboration is to work, all parties must have a common interest and a real desire to make it work.

Given the acknowledged difficulties of collaboration, one plus one needs to make more than two if the whole thing is to be worthwhile. So what are the key factors that make collaboration work, asked Lanza? The European Foundation Centre (EFC) has recently commissioned FSG Social Impact Advisors to carry out a study on the potential for the EFC to promote collaboration among its members. Entitled *Multiplying Impact through Philanthropic Collaboration*, the study identified five elements in successful collaboration: openness to collaboration, recognition of opportunity, engagement of partners, planning and setting up, and operation and implementation.

And the role of associations? Associations can best work on the first three elements, which are about building an enabling environment, Lanza said, though they can also play a role in supporting the development and implementation of specific collaborative initiatives or platforms. The report identified six potential roles for the EFC, to:

- Stimulate demand for collaboration
- Develop an online information-sharing tool for foundations
- Enhance meeting platforms
- Develop peer-to-peer learning
- Create services to support the development and implementation of collaboration
- Help collaborations access European funding and advocate effectively at European level

Lindsey approved the distinction between what she termed the soft and hard parts of collaboration, that is, building an enabling environment and supporting specific collaborations. An example from Los Angeles illustrated the potential of working on the 'soft' side. Eleven local foundations met regularly but were clear that they weren't interested in any collaborative projects. But when unfavourable legislation was proposed, 8 out of the 11 got together to hire

a lobbyist to counter it. Associations can thus bring foundations together so they are ready to act if the occasion arises.

What kills collaboration? Both panellists identified ego, personal or institutional, as one main culprit, and the resultant unwillingness to change. Lindsey told the salutary tale of an attempt to devise a common evaluation form: each funder wanted their own feature included so the form ended up much longer than the individual forms. But associations can help the process. They can help people talk through problems, and encourage them to persist.

How will the Council on Foundations (CoF) and EFC work with other regions, asked Atallah Kuttub of the Arab Foundations Forum? A first step, said Lindsey, is to spend time with others around the world and see who you might partner with, building relationships and trust. The Global Philanthropy Leadership Initiative (GPLI) project, involving CoF, EFC and WINGS, is starting to reach out to the Global South.

How can we engage ultra high net worth individuals?

Panellists at this session were eloquent about the needs of donors in emerging markets. Olga Alexeeva of the Philanthropy Bridge Foundation spoke of the tendency to what she called DIY philanthropy, with donors wanting to do everything themselves, setting up their own organizations to implement their programmes and having little connection with the existing non-profit sector. They are risk-averse because they are worried about what their peers will think, and willing to support only limited 'safe' areas. Poverty tends to be a subject that's avoided.

Maria Chertok of CAF Russia presented a similar picture. People in Russia are not very aware of issues, she said, let alone solutions. They tend to fund what they see, for example orphanages. AIDS, on the other hand, is ignored and stigmatized. She agreed about the importance of peer influence.

A key role of donor associations and support groups, therefore, is donor education and the provision of safe settings for conversations with peers such as that provided by the Foundation School, run by CAF in association with the Philanthropy Bridge Foundation and the Russian Donors Forum. Discussions need to focus not just on how much donors give but on where they give, how they give, and what the results are. Transparency is a key issue.

The relationship with private banks was another issue that came up. Robyn Scott of Philanthropy New Zealand said they were besieged by private banks wanting to offer philanthropy services. Participants recognized that there is a potential conflict of interest for banks offering philanthropy advice, but as banks will often be the first port of call for wealthy new givers, the best course for donor associations is to encourage good practice, including advisers with banks making referrals to other advisers when appropriate.

Communicating the value of foundations to key influentials

The first question to be asked about the fourth session in the collaboration track is: who are 'key influentials' or, to use more ordinary parlance, 'people with influence' Mark Sedway of the US-based Philanthropy Awareness Initiative defined these, within the US context, as the 12 per cent of US adults who have worked on key social issues ('engaged Americans') of whom 0.5 per cent are decision-makers.

The background to the session was the often-made point that with governments retreating everywhere, there is a bigger role for philanthropy – hence the need for foundations to be more visible and to communicate their impact better. The aim of the session: to suggest ways associations can help communicate and engage with key influentials. Sedway told a story of a meeting in Austin, Texas at which 15 foundations were asked which key influential they needed to contact in order to get their work done. Around a third named the same person. The conclusion was that this person might not appreciate the value foundations could bring to education and that they might do better if they made a common approach. A survey by the



Philanthropy Awareness Initiative of engaged Americans found that only 38 per cent could mention one foundation at first try – demonstrating the scale of the challenge and the need for foundation associations to take it on.

Global Community Philanthropy Initiative

This session was in effect a report on an ongoing attempt to collaborate between three existing organizations – the Global Fund for Community Foundations (GFCF), WINGS-CF (part of WINGS focused on community foundations) and the Transatlantic Community Foundation Network (TCFN) – and an opportunity for feedback from participants on what was happening.

While GFCF director Jenny Hodgson outlined the changing context in which community foundations are now operating, Global Fund chair Barry Gaberman sketched out the background to the collaboration. In a situation of pressing resource constraints, with the Mott Foundation almost alone in its willingness to support philanthropy infrastructure, it was seen that there were three community foundation networks which overlapped in function. Some carried out unique functions, for example, grantmaking by the Global Fund, and TCFN was completing its ten-year life cycle. The question was: is there a way to preserve the essential pieces of each network?

The conversation about bringing together the work of the three organizations began around 18 months ago. The initial idea of a new entity coming into being was soon abandoned. Instead, six areas of support for community foundations have now been identified - funding to support start-up; peer learning to share practice and forge identity; technical assistance; legitimization of the field; advocacy on the legal and fiscal environment; and convening – and the task now is to decide who will take on this work in future.

As Nelson Colon of the Puerto Rico Community Foundation pointed out, what is needed is to develop a value proposition for donors, large and small, and for the NGO community, and then to communicate the value of community foundations to both audiences. The Global Fund report *More than the Poor Cousin?* is a first attempt to make the case for community philanthropy organizations as key players in development.

The discussion among participants underlined the difficulties of any sort of merging of different organizations. Several speakers talked of the huge benefits participation in the TCFN programme had brought them, especially through bringing together practitioners with very different levels of experience, and asked whether the new initiative could bring these benefits to the global level. It seems that the body of knowledge produced by TCFN will be made available on the Global Fund website.

Other participants mentioned the need to link with the spontaneous peer learning now happening among community foundations in Europe, and the possibility of establishing a global exchange so that community foundation practitioners can ask questions and get answers from peers, along the lines of that now offered by the Council on Foundations. Creative ways to do a lot with little money will clearly be needed in a world where global exchange is needed but resources are few.

What did you get out of this WINGSForum?

Ansis Berzins, Community Foundation Movement in Latvia

“What I’m particularly enjoying here is that there are so many conversations focused on practical issues.”

Roberto Calingo, Asia Pacific Philanthropy Consortium

“My main aim in coming to the WINGSForum was to learn more about how APPC, as a regional grouping, could fill the gap left by WINGS moving to Brazil.”

Innovations/Capacity Building



Among the major preoccupations of philanthropy, finding new, more effective ways of working, employing these on a wider scale, and bringing new, local resources to bear on the problems societies are trying to solve. This track at the WINGSForum touched on a wide range of ideas in the service of this quest, among them capturing funds from the privatization of public assets, elaborating principles for effective disaster grantmaking, using complex adaptive systems theory to assess grantmakers' work, and finding ways to promote local giving by tapping into a community or group's traditional values.

How not to make disaster grantmaking a disaster

Good disaster grantmaking is really no different from good grantmaking: a clear message from a session with a tongue-twisting title. Andrew Ho of the Council on Foundations (CoF) outlined the principles of disaster grantmaking, culled from CoF's publication based on lessons learned from disasters such as the Asian tsunami, Hurricane Katrina and the Haiti earthquake.

Do no harm

This is the first principle, echoing the Hippocratic Oath. Not all disaster assistance is beneficial. In the 2004 Asian tsunami, a flood of unsolicited supplies, combined with a lack of storage and transport capacity, forced the rapid distribution of goods that weren't needed to affected families. Ensure that your grant contributes to the solution, not the problem.

Stop, look and listen before taking action

Again, following the Asian tsunami, large quantities of food and clothing were sent but what was really needed was sanitation.

Don't act in isolation

Bear in mind the expertise and resources of local organizations. Many faith-based organizations in the US's Gulf Coast, for example, have structures in place to meet the needs of their communities in times of crisis. Unfortunately, in the aftermath of Hurricane Katrina they were often overlooked during the distribution of funds.

Think beyond the immediate crisis

A significant amount of donor money went to build 14,000 new homes in Aceh after the Asian tsunami. Unfortunately, some of the houses had to be retrofitted or entirely rebuilt because they were built in the haste to do good and without adequate planning.

Find out how prospective grantees operate

During the 2005 hurricane season, funders often made grants too quickly and without proper information. Since they did not have existing relationships on the ground, funders simply gave money to the largest institutions in the region hoping it would find its way to organizations serving communities in need. Unfortunately, much of it did not.

Be accountable to those you are trying to help

Some of the second-hand clothing donated to India in the wake of the tsunami was not appropriate to local cultural norms, which led to feelings of humiliation among beneficiaries.

Communicate your work and use it as an educational tool

In Haiti, for instance, good use was made of information technology and social media to respond to the crisis. This includes not only working with the media and community groups to raise public awareness about disasters and their causes and possible prevention, but also working with your own staff and boards.

Hans Fleisch of the Association of German Foundations (BDS) quoted Bill Clinton as saying that the challenge of the 21st century is to find what works and to scale it up. He and his fellow presenters, Barbara Ibrahim of the John D Gerhart Center for Philanthropy and Civic Engagement and Lester Salamon of the Center for Civil Society Studies at Johns Hopkins University, set out their own very different ideas on new ways to solve social problems that are capable of widespread adoption.

Hans Fleisch offered the idea of social franchising. Thirty per cent of services in the for-profit sector, he said, are delivered by franchises. They also have a survival rate of 95 per cent. What can we learn, he asked, and what are the steps involved? You need to find a prototype, then a franchiser who in turn finds franchisees to replicate the prototype. Youth2Youth in Ethiopia is an example of a successful social franchise, he said. Infection rates of HIV/AIDS in Ethiopia are high, as is the number of unwanted pregnancies, largely because of the lack of sex education and health services for the young. BDS found a local youth club, the Save Your Generation Association, which was involved in raising awareness of the issues, to act as franchiser. Further inputs were provided in the form of professional expertise, scientific advice and some grant money. The model has spread successfully, and seven years on there are some 700 such clubs throughout the country. A spin-off benefit is that the clubs also act as a 'virtuous network' along the lines that Professor Zamagni set out in his remarks about the role of CSOs in forming the cultural matrix of a society in the opening plenary (see page 4).



The experience showed that rapid scaling up is possible, said Fleisch, even without fees for the franchisees. However, time and money are essential investments and the network is cost-effective but not self-sustaining. In a large area, a 'master franchisee' is needed to keep the original idea on course.

An exploding population combined with a lack of good educational facilities and job opportunities for young people has created what Barbara Ibrahim described as a 'stalled generation' in Egypt. Out of this has grown a youth volunteer programme, Resalla, entirely operated and planned by young people. Through local branches, this provides a variety of services including tutoring for children and care for handicapped children, collection of unused medicines that aren't out of date to fill prescriptions for poor people, and recycling of clothes.

How does it work? Members each contribute 10 Egyptian pounds a month. If someone wants to start a new branch, they are required to spend an 'apprenticeship' period in an existing branch. The new branch then starts with the simplest activities, such as a used clothing drive. Standards and values are maintained by a central management committee which does nothing but branch outreach, so each branch can count on several visits a year.

Underneath it all is a very strong values base, said Ibrahim. Many of the members talk about wanting to be good Muslims through giving, about 'building the good society, brick by brick'. In other words, they are reimagining the Muslim tradition of giving for the modern age. Though the network has proved its capacity to spread, there are challenges, she said. There is no way to remove a non-performing branch, which makes it potentially difficult to maintain the image of the whole organization. The government could interfere at any time and close down a branch or the whole operation on the pretext of its being too political. Lastly, Resalla has yet to meet the challenge of leadership transfer.

Philanthropication through privatization was Lester Salamon's topic, coining, with his tongue in his cheek, a term he acknowledged to be ugly. There is a basic problem of lack of capital in developing regions, he said, yet privatization of public amenities is going ahead in these places – the sale of Turkey's power grid and Kenya's generating company, for example. In fact, over the past five years there have been \$550 billion of private sales of public assets. If philanthropy could get its hands on some of this, he proposed, it would revolutionize the foundation landscape in these areas. This is what happened when the Italian banks and Volkswagen were privatized, and the Italian banking foundations and the Volkswagen Foundation were born. Moreover, the moment is favourable, he suggested. There is growing interest in philanthropy on the one hand and much resistance to privatization on the other. Some of this resistance could be disarmed if some of the money were to go to building public assets or quasi-public assets. For its part, business is looking for win-win situations and the growth of the community

foundation movement means that some of the infrastructure already exists.

The main obstacle to the idea, he said, is that there has been no systematic gathering of information and lessons have not been learned from past experience. He suggested that the case needs to be made for 'philanthropicization through privatization' and that the non-profit sector should take this on through the example of three or four cases.

Improving philanthropic impact

Is a crisis always an opportunity? Rosa Gallego of the Association of Spanish Foundations who moderated this session is not so sure, but she does believe that the crisis will make philanthropy work in a different way, with more attention to its impact.

She introduced Marilyn Darling of Signet Research & Consulting whose work on the use of complex adaptive systems theory in measuring effectiveness has led her to the view that US foundations over-insist on evaluation activities rather than identifying a few essential questions, and don't articulate their thinking. In her experience, foundations need to connect action and hypothesis to see if the former justify the latter – in other words to ask themselves, did they get the result they wanted?

What can be done to improve? Small, well-articulated steps, was her suggestion. 'If you don't say why you're doing something, you'll continue to do it wrong,' she argued. Try little experiments and focus on specific areas. Associations could help here by talking to members about whether their actions produce answers to the specific questions they are asking. Members of organizations should focus on what they need to do to achieve the organization's overall goal.

Chet Tchozewski of Global Greengrants Fund offered a more practical, grantmakers' perspective on the impact question. Ultimately, he felt, it is a distribution problem. 'It's getting money out to where it works.' His experience with Global Greengrants has been that small grants are more effective than large ones and that most grantmakers know this but ignore it because of the high fixed cost of such grants. In other words, they aren't doing what works best. Social movements, he said, have great impact: they produce results that are lasting, they can learn from their mistakes and they can survive. They are like networks in that they are greater than the sum of their parts.

How do they form? While he professed himself sceptical about theories of impact assessment, he agreed that complex adaptive systems theory could provide more useful insights here than a linear logic model. For instance, the long-held 'grievance' theory proves not to be true. Often what really galvanizes social movements is the arising of an unexpected political opportunity which some leaders have the ability to anticipate. Funders need to get money to these prescient individuals quickly, as Global Greengrants tries to do through its worldwide network, to take advantage of these opportunities, 'but don't expect to understand what they're doing', he cautioned.



One point on which both Tchozewski and Darling agreed was raised by Atallah Kuttub of the Arab Foundations Forum. You have to measure all the time, he said, because conditions are constantly changing. If you only measure once a year, you are measuring the wrong things, he suggested. Rosa Gallego said that something that often worries Spanish foundations is what they do if they measure impact and find they are failing. 'We have to help our members deal with the fear and explain to them that measurement legitimizes them.'

Indigenous philanthropy

Robyn Scott of Philanthropy New Zealand said there is a prevalent view in her country that 'Maori don't do philanthropy'. Actually, she said, philanthropy is at the heart of Maori culture – just not in the way the global north uses the term, and we need to tap into this tradition. Following what are essentially reparations agreements from the colonial era, some Maori

tribes have received large settlements from the New Zealand government. Philanthropy NZ has established a Maori advisory committee to its board and convened a hui, a tribal consultative process, to foster indigenous practices of giving, but it has not been easy. A growing Maori population and the over-representation of Maori in most of the country's negative statistics (48 per cent of the prison population are Maori, though they make up only 14 per cent of the population overall), mean that they have often been the object of giving by white donor organizations, a habit that is hard to change.

In Africa, too, philanthropy, broadly understood, is ingrained in many indigenous cultures, said Janet Mawiyoo of the Kenya Community Development Foundation (KCDF). There is a growing realization that Africa must drive African philanthropy, she said, and African organizations need to work together to promote it. As an instance of this, she cited the recently launched African Grantmakers Network. She also mentioned the work of TrustAfrica and how its work illustrates the value of research and of having a pan-African knowledge base.

Again similar to the case of New Zealand, one of the obstacles to an African philanthropy driven from within is the dependency culture that has grown out of years of overseas aid. This is one of the attitudes that KCDF is trying to change. It is also promoting the building of institutions so that giving is not seen as giving to an individual but to an issue. She outlined KCDF's many-stranded approach. It is exploring the role of religious institutions in launching or galvanizing small donation programmes. It is engaging with corporate foundations, looking for ways to 'harness', in Mawiyoo's expression, the money companies make in Africa. It is also looking to tap high net worth individuals as their interest in giving to local organizations grows.

KCDF increasingly publicizes its work to draw attention to raising community assets and its own competence in this area. It has recently had a public launch of several recent legacy funds so that it is known that KCDF can manage these. Finally, it is looking at diaspora giving.

Underlying giving in the Middle East are values drawn from the region's religions – Islam primarily, but Judaism and Christianity too, said Atallah Kuttub of the Arab Foundations Forum (AFF). One of AFF's aims is to influence Arab foundations to move in a more strategic, social change direction. 'We'll never capture religious giving,' he concluded, 'but we hope we can influence giving in general.' In addition, the question of institutional giving often becomes politicized. Business leaders in the Middle East, he said, disenchanted with the status quo, are using their wealth to set up donor institutions to combat the prevailing political mores. Though there is no foundation law in Egypt, over 400 foundations have now been set up by influential people who aren't easy to intimidate. And 'where Egypt goes', he said, 'the Arab region goes'. In this charged situation, AFF's aim is to help start local funds to support human rights so that there can be no accusations of importing alien values.

The development of AFF itself is a barometer of how things are changing. Its genesis was a meeting of Arab organizations in Budapest in 2006 – in other words, they went outside the region to meet. Now it is 34 foundations strong. 'We want to understand what is happening in the region and to develop our own discourse.'

One of the general difficulties of trying to connect with different forms of indigenous and local philanthropy was crystallized by a comment from Lucy Githaiga of East African Association of Grantmakers. The problem, she said, is often that they don't understand the terms we use. How do we find a language to communicate with them?

What did you get out of this WINGSForum?

**Janet Mawiyoo,
Kenya Community Development Foundation**

"I see the value of this event as a major forum for networking, for hearing what others are doing, which helps you figure out your challenges, realize you are not alone, and get energized to continue this challenging work."

Concurrent Session, Thursday 18 November
Improving the Legal and Enabling Environment for Philanthropy

One of the major concerns for grantmakers who operate internationally is the restrictions placed on their activity by unfavourable fiscal and legal regimes in recipient countries. This session provided an overview of such restrictions, set out some means of countering them, and offered two cases where grantmaker associations joined issue with governments in attempting to secure more favourable treatment of cross-border donations.

David Moore of the International Centre for Not-for-profit Law opened this session with a survey of the legal barriers internationally to cross-border philanthropy and some options for addressing them. This is a widespread problem, he said, affecting some 40 countries. It's also very topical, since many punitive laws had been enacted in the last five years. The most apparent barriers to what he called 'outflow' are: 'landlock' restrictions which require expensive and time-consuming equivalency tests before donors in one jurisdiction can give to recipients in another; counter-terrorism legislation that is sometimes drafted so broadly that, in the US for example, it could even restrict giving to peace-building efforts; and restrictions on giving to sanctioned countries.

As far as recipients are concerned, obstacles include the requirement of advance government approval; the enforced routing of funds through government departments; restrictions on the purpose of giving; burdensome reporting requirements; punitive tax treatment of donations; and foreign exchange restrictions. The effects of all this on NPOs in countries where giving from abroad is either restricted or impossible could be crippling, he said. In Kosovo, for instance, he argued that restrictions on foreign funding had effectively hindered the movement for democracy and civil society.

So what is to be done? For one thing, more information must be gathered. He suggested a survey of philanthropy's views on existing laws; the indexing of current barriers; the monitoring of legal challenges; and the devising of tools to help donors navigate existing laws (he cited the Giving in Europe initiative as an example here).

Research is also necessary, he said, to make the case for reform. The other components are the development of principles for cross-border philanthropy and the introduction of treaties to implement it. The Millennium Development Goals have both widespread political sanction and moral force, and they too could be used as levers to break down barriers to giving.

Talk of treaties on cross-border giving led on to Hanna Surmatz of the European Foundation Centre talking about its work in pushing for a European Foundation Statute. The EFC has drafted a model law from examples of existing good practice and is advocating for a foundation statute and reform

of current national laws among EU member states to end discriminatory treatment.

The EFC's campaign has been very demanding of resources, she said. Such campaigns need external support, and they need time and patience. The results are mixed. As far as the foundation statute is concerned, there is general approval at EU level, but the sticking point is that the approval of all 27 member states is required to ratify it. The news is better on reform of existing legislation, with 17 of the member states now allowing tax deductibility on cross-border donations. The main lesson the EFC took from this experience was that in order to shift laws, expert cooperation and targeted advocacy campaigns are needed.

The use of lobbying and the media were also highlighted by Gina Anderson of Philanthropy Australia (PA). In 2008, she said, in response to the financial crisis, the Australian government mooted the idea of setting an annual spending rate for the country's newly fledged foundation sector of 15 per cent, which would have led to the disappearance of most of them within ten years. So Philanthropy Australia sent round a policy alert to its members which galvanized an immediate clamour against the idea.

It then launched an active advocacy campaign, using members to talk to anyone who might have political clout. PA also paid a lobbyist. While Anderson herself did much of the face-to-face work, the lobbyist came up with useful arguments. Having created a movement of opposition to the proposed change, PA then set up a technical committee to build a culture of giving in Australia, giving it a collaborative rather than a confrontational cast.

The result has been bipartisan political support in Australia for a 5 per cent foundation payout rate. Like Hanna Surmatz, Anderson cited the need for time and patience and underlined how swift, well-publicized action (the policy alert), followed by persuasive, positive advocacy, has been effective.





Forum Marks the Launch of Two New Reports from WINGS

The first plenary of the second day of the Forum showcased two new WINGS reports, the 2010 Community Foundations Global Status Report, written by Barry Knight of CENTRIS in the UK, and Global Institutional Philanthropy: A preliminary status report, by Paula Johnson of the Center for Global Philanthropy based at TPI in the US.

The 2010 Community Foundations Global Status Report, said Jane Humphries, who chaired the session, is a departure from previous editions. It is a 'living document', she said, designed to capture the spirit as well as the facts and figures of the development of community foundations. In addition, said Barry Knight, the report is the sixth in a series, so we can be more confident about identifying trends. It contains 27 country reports; an account of trends in the field and what is driving them; connections and support; the external environment; who is giving; and stories, archives and resources. It is, he said, more of a resource than a report and designed so that users can engage with it.

'The people affected by a problem must be part of its solution'

The number of community foundations has nearly doubled in the last 10 years, showing a stable upward trend. Most of this increase has been in Europe, he remarked, with numbers slowing down in North America. On the importance of support organizations, he noted a clear correlation between good support networks and associations and a favourable legal environment. The number of support organizations in a country or region is a good predictor of future growth.

General trends in the external environment, he said, show big donors withdrawing but local donors stepping in to compensate. Surprisingly, he said, corporate donors have proved the biggest supporters of community foundations. It is clear that their value is at the very local level where 'society either works or it doesn't'. They produce trust, cohesion and involvement. They show, he said, that 'the people affected by a problem must be part of its solution'.



More 'an archipelago than a field'

The aims of the study on institutional philanthropy, said Paula Johnson, were to bring together the knowledge of the WINGS membership to give a global perspective on the field. The report contains an overview and profiles of individual countries. However, she cautioned, the data for individual countries is incomplete and cannot be compared, and most countries lack a centralized data collection body.

That said, certain general observations can be made. There are evident cultural differences in how philanthropy is viewed, and overseas development aid often makes a difference to how it is perceived in recipient countries. However, institutional philanthropy is on the rise, fuelled by the growth in global wealth and corporate social responsibility practices, and by changes in state policy giving the non-profit sector an expanded role as government resources are increasingly unequal to the tasks facing them.

Such policy changes are not universal, however. The legal status of philanthropic institutions in some countries is unclear, grudging or even non-existent. Likewise, government oversight can be burdensome and complex. No clear consensus on the impact of fiscal policy on giving has emerged from the research. There are some common models, she said, such as corporate foundations, community foundations and private foundations, but the distinctions between them are not always clear, nor do they conform to any global definition. As to overall assets and expenditure, any estimates are largely guesswork. In short, she said, institutional philanthropy can better be described as 'an archipelago than a field'.

The main challenges, she concluded, are the legal position of philanthropic institutions, public perceptions of them, and transparency.

Stefania Mancini
Vice-President of Assifero



Where did the idea come from to host the WINGSForum here this year?

WINGS approached us about a year ago with the idea of hosting the conference. There was a general consensus at Assifero that we should do it, because the situation of philanthropic institutions in Italy is completely different from that of those in English-speaking countries and one of the ways of learning is to be connected with international networks and to exchange experiences of managing foundations, managing projects, evaluation, etc.

What is the main difference between the Italian experience and that of English-speaking countries?

I think fiscal policy towards the non-profit sector. In Italy, the advantages are so few that there is little incentive to set up foundations. Even now, there are less than a thousand private grantmaking foundations – private, corporate or family – in Italy. Compare this with the number in the US, it's nothing. So while there is a culture of giving here, it didn't result in the creation of foundations.

So it's more direct giving, but not through foundations?

Donations in Italy are given mainly to non-profit organizations and an important element is the in-kind contribution provided by experts or volunteers to NPOs.

To go back to your point about learning from different experiences: you feel a gathering like this links you into a big international network?

I've been promoting strong international relationships since I worked in the European Union Commission context. I hope that after this meeting we will begin to see transnational relationships between similar kinds of foundations. For instance, yesterday, I was talking with Adam Smith of the Foundation for Young Australians because we are searching for projects with young people around the world.

So you see collaborations possibly coming out of the meeting?

Yes, not only project collaboration but cooperation in terms of spreading new ways of developing the culture of philanthropy. Fernando Rossetti talked yesterday about the failure of the G20 to solve the new issues the world is facing. I think that even the Italian foundations are playing an important role in fighting poverty and promoting the rights of people to institutions and governments. Any kind of contact at international level can only benefit a national network. No network can grow in a proper way without being connected on a broader level.

What for you is the main purpose of the WINGSForum?

First, it's healthy and balanced. If you think only at country level, you risk becoming self-centred. Contact with stronger and different foundations can help you contribute to developing possible new ways of managing foundations and of managing relations with other foundations, with public institutions, with recipients. One thing that I miss at this kind of meeting is a focus on recipients, because I think foundations need to be aware of their recipients in everything they do.

What has impressed you about the Forum so far?

I took part in a very interesting session yesterday with representatives of the World Bank and the Inter-American Development Bank and there was strong representation from around the world among the participants. Also, the morning session yesterday showed the level reached by WINGS in only ten years. From talking to people, I've got the impression of people really able to manage a foundation responsibly – if you work for a foundation, you are first of all responsible towards your society.

Do you feel a lot of energy around it?

Not only energy, but ideas that can open minds to new points of view, new ways of working. For example, yesterday I met a number of people and I know that as soon as I go back home, I will get in contact with them as a foundation representative because I'm really interested in seeing how they run projects. It's not a question of money or capital or assets, it's a question of managing a foundation.

“Any kind of contact at international level can only benefit a national network. No network can grow in a proper way without being connected on a broader level.”

Barry Gaberman

WINGS Chair Emeritus and Chair
of the Global Fund for Community Foundations



As one of the founding fathers of WINGS, you've been around from its very beginnings. What are you most proud of about WINGS?

The thing that I'm most proud of is that it's an institution that has continued to learn. It hasn't been afraid to adapt and change the principles that we started with. For example, we started with the principle that it would rotate every two years, and we've learned that that was absurd. In fact, it was never two years: it was three years at the Council of Foundations and then four years at the European Foundation Centre and at the Asia Pacific Philanthropic Consortium in the Philippines. Now we are going to test out having a more permanent location, with GIFE in São Paulo, Brazil.

We also started out with the idea that incorporating would simply add to the philanthropy infrastructure and make one more institution to be sustained. WINGS has now incorporated. A crucial thing we learned is that where you incorporate doesn't determine where you operate. This is important because we didn't want to see ourselves operating permanently in the North. We now have the best of both worlds in a sense: we're incorporating in the United States with 501(c)(3) status, which makes it easier for raising funds for WINGS, and we're operating from a thriving, growing economy in the South.

Related to this is the fact that we initially called WINGS a network of participants in order to avoid the term membership. We wanted to avoid having a bureaucratic governance structure with a set of rules around holding annual membership meetings and selecting members of the coordinating committee and things like that. Maybe it wasn't a totally democratic and open way of doing things but it was perceived to be an effective and efficient way to do things at that early stage. That's changed too. Now WINGS is a formal legal entity. It has a board of directors and it's going to ask for membership dues, and I think it's ready now to do that.

What about financial sustainability? What are the prospects looking like there?

Well, as WINGS starts to put together its new strategic plan, it's realizing that it has to come up with a new business model as well. The environment has changed. Whereas ten years ago I could easily name a dozen foundations just in the US that would fund civil society and philanthropic infrastructure, today I'm hard pressed to find anyone beyond the Mott Foundation that's really in it in a developed, programmatic way – though I do think we're at the bottom of a cycle and some new institutions will come in and start funding. The Gates Foundation is one,

if only because it realizes it's such an important member of the funding community and has a responsibility – and anyway what it does is going to be so modest compared to its resources that it'll be easy; it's a no brainer really for Gates. That doesn't mean we won't all sit around and carp and criticize the way they do it – they're the big kids on the block and that comes with the territory.

But I don't think we're going to go back to the kind of business model that existed before, which was to identify three or four major foundations that essentially took care of your funding. It's going to be very different. Members are going to have to tax themselves in the form of membership dues; WINGS is going to have to charge for more of the services it provides; and members will have to contribute time to carry out tasks that might previously have been outsourced to a consultant. WINGS' budget averages less than \$400,000 a year, so it's all quite doable.

If members start to support the organization, it will be easier to go to foundations and to ask them to fund things that they have a soft spot for – for example subsidizing some of the places at peer learning events so that those from emerging institutions can attend – instead of approaching them for unrestricted money for core activities. Or a foundation might be interested in a particular geographical area or a particular issue such as youth development or the environment and be willing to fund an activity in that area. These are things we need to test out.

What about the arrangement under which WINGS will collaborate with the Foundation Center to collect data on global philanthropy through its networks? Is this part of WINGS future business model?

Thanks to Lester Salamon's work and more recently the development of GuideStar International, we now have data that provides a snapshot of civil society in many different countries. What's missing is the philanthropic slice of the not-for-profit sector. And I think its sheer brilliance on Brad Smith's part to quickly see that the Foundation Center cannot become the global foundation centre. In the US it's a \$20 million organization with a staff of 140. Globally, it's got to find some other way of operating. And it makes perfect sense to go to the association level to collect data, and at the global level that means WINGS.

I think this is a win win: the Foundation Center is going to get data that is going to make it richer and more valued, and it's going to add capacity to WINGS and help make the associations themselves stronger.

Is there anything about WINGS that you regret?

I'm sorry it was never able to develop other communities of interest beyond community foundations. It tried on the corporate side, but it never quite seemed to catch on. But it seems that WINGS might now think about reintroducing the idea of affinity clusters, but seeing them in a more flexible, more agile way. They don't have to be forever; they could have a beginning and an end; they could be presented as projects that would be of particular interest to one or another funder.

In the meantime, WINGS will need to be careful that it doesn't try to mainstream WINGS-CF prematurely. I think there's a lesson to be learned about mainstreaming too soon. Take the Community Philanthropy Initiative at the EFC: there was a notion that it would be a mainstream part of the EFC's work, but the strong identity that the group had was lost and in effect the initiative was lost.



“I don't think we're going to go back to the kind of business model that existed before, which was to identify three or four major foundations that essentially took care of your funding.”

Fernando Rossetti
chair of WINGS



What is the significance of the Forum title?

Innovation and impact are central themes in everything that we have been doing. Our members are looking for new ideas. Associations need to convey a message that ours is a sector that does innovate for society. Also, a question that is frequently asked is: 'What impact does the sector have?' So the two words sum up a lot of the issues that we're scrutinized on.

Because of the crisis, I imagine the question seems much more urgent than it was two or three years ago?

Yes. The financial crisis hit philanthropy in general, and for the intermediary organizations it was particularly hard. I would also say, it catalysed movements that were happening already and accelerated processes of change in the systems of funding and philanthropy.

WINGS is moving to a long-term home in Brazil next year. Why did you choose Brazil?

To start with, there is a stable political, social and economic environment. Second, we wanted to be in the global south. The infrastructure for civil society is much stronger in the northern hemisphere, and we want to develop it for the global south. Besides that, we wanted a country that could generate local resources and Brazil's economy and philanthropy sector are booming, so there will be local funding for WINGS. Finally, there's already a strong association there in GIFE, which can support the move and the establishment of an office.

Having a fixed base will clearly have the advantage of maintaining momentum and institutional memory. Will WINGS lose anything by having a fixed base?

I don't think so. We're not saying that we're never going to move again. We'll be fixed in Brazil while it makes sense, but if we find we're losing something because we're in one place, we will move again.

What do you foresee for WINGS over the next few years?

I foresee a stronger and stronger role for WINGS. There is an incipient global infrastructure for philanthropy and civil society and I expect a consolidation of this and more demand for structures like the Global Philanthropy Leadership Initiative which can think globally. In terms of programmes, I think we will see WINGS develop a web-based relationship with its members, which will be a very important change. Having meetings around the world is expensive and it's difficult for many to participate.

WINGS is beginning to be a knowledge producer on philanthropy worldwide – we have done six Community Foundation Global Status Reports and the first Global Institutional Philanthropy report – and I expect to see partnerships like the one we have with the Foundation Center develop.

On the Global Philanthropy Leadership Initiative, my understanding is that WINGS is providing access to a wider world than the other partners can?

Yes. It's an initiative for foundations that are working globally. The Council on Foundations and the European Foundation Centre have got easy access to the regions where they work, but it's easier to connect with philanthropy in the big emerging countries like Brazil, Russia, India and China through their local associations, like GIFE or the Russian Donors' Forum, so that's where we come in.

So in effect you'll be taking a lead, widening the scope of the initiative.

Yes.

How happy are you with what's coming out of the Forum so far?

Well, I'm a Brazilian, I'm very optimistic! What I get is a clear message that we need a structure like WINGS for global philanthropy, for connecting local and regional philanthropic initiatives at a global level, and for learning, for accelerating change.

I know in past WINGS gatherings, it's been a challenge to get people here from some regions because of the cost and time involved. What's your sense of the mixture of people here?

This is a very important issue. We have 39 countries and more than 60 associations represented here. But if you look at the list, you'll see that the places where philanthropy is more organized have a better representation, and the places where philanthropy is less organized have little or none. I have felt the absence of some important players. There's only one person from India, for example, and no one from China. WINGS has a responsibility in the next few years to reach out and bring them into the network so that we can exchange experiences, align our values and even, if possible, do things together.



“I foresee a stronger and stronger role for WINGS.”

Marissa Camacho
outgoing WINGS Executive Director



“We’ve been monitoring the participation of WINGS network participants in all our activities and there has been a really big increase.”

What do you feel have been your greatest accomplishments at WINGS over the last four years?

One of WINGS’ core activities is the peer learning events, and I’ve been pleased with three of our innovations there. The first is the adoption of the emergent learning approach. In the past it’s been hard for participants to use what they’ve learned in their everyday work. With this new approach, participants have time to think about their own work plan for the next few months and how they can apply what they’ve learned from this discussion so there is a practical use for it.

The second innovation is the introduction of regional peer learning events. In the past they had always been global – and that’s very important, we should continue that – but we’ve also introduced the idea of setting aside time to discuss regional issues and concerns, to develop relationships within a region and open up opportunities for collaboration.

The third thing we did was to document events in a format that would be useful for those who could not attend. For example, our peer learning events bring together 16 or 20 members; but we have a network of 144, so the majority were missing out on what was learnt. In the past, events were documented, but even if you put all the presentations together, it was hard to understand unless you were there at the discussion. By producing a resource book, even those who were not there can share in the lessons.

Are there other things apart from the peer learning events?

Another thing that I’m very pleased about is the area of resource development in publications. For example, we’ve improved on what was already good by making our Community Foundation Global Status Report web based. We also produced our first report on global institutional philanthropy. It was hard to get it

started – people thought that it was too ambitious a project and that we wouldn’t get the data. But I couldn’t see who would be better to get data from in the field than WINGS, because of its presence in 54 countries. It’s exploratory work, but I think what is useful is finding out what’s available and what’s not available. I hope that this report will encourage and inspire the different associations to think about how to gather data.

The third thing I’m very happy with is that we’ve been monitoring the participation of WINGS network participants in all our activities – peer learning, response to surveys, etc – and there has been a really big increase in the rate of participation, so that’s great.

Do you have any regrets?

From the beginning we were thinking about knowledge management, and particularly developing the website to be more interactive. We’ve gone quite a long way in terms of having an idea of what we want to do, but we did not get to the point where it actually got implemented. That’s one of my big regrets!

And I guess the other thing that has the potential to be addressed is how WINGS can be the platform for doing more global work. Based on what I’ve seen, with new initiatives and the growth of participation, I am 90 per cent sure that it will happen. So it’s not a regret – it’s just that it didn’t happen soon enough.

One last thing I just wanted to say is that Helena and I have started really working together. If we’re to have a seamless transition from the Philippines to Brazil I think it’s very important that we’re able to do this.

As you come into the role, what are you most excited about?

I see the organization is going into a new stage of development, after the accomplishments of the last ten years. Members have new expectations, and the global context for philanthropy also means new demands for an organization that can bring people together from different parts of the world to look at global issues, so I think this is a very exciting time for WINGS. With the move of the office to Brazil, it's also good that we can strengthen our presence in Latin America.

Do you want to say something about the partnership with Foundation Center?

Starting last January, we're setting up a knowledge management strategy, a system to gather information from our members, who will gather information from their local members. We can then put all this information together and give access to the Foundation Center, to WINGS and to all our members. So this is going to be a very exciting initiative in terms of gathering and disseminating information.

And what about working with the Global Philanthropy Leadership Initiative?

That has been exciting as well. We can see the increasing interest in global philanthropy issues: there is demand for mapping and analysis, for more organized information, and for groups to be formed to work on certain issues. WINGS has access to members from all over the world, so can play a crucial role in leading this initiative over the next 18 months or so.

Finally, what do you see as the biggest challenge ahead of you?

One of the biggest challenges is to come up with a new formula for WINGS' sustainability. The funding environment has changed a lot and so has the organization, so we need to find a new formula to guarantee the future of WINGS. That's a big challenge but there is light at the end of the tunnel. There are partnerships that are already being discussed – for example, we have a partnership on the way with GIFE in Brazil – and there are new donor markets and areas that we need to explore.



Helena Monteiro
incoming WINGS Executive Director

“The funding environment has changed a lot and so has the organization, so we need to find a new formula to guarantee the future of WINGS.”

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