

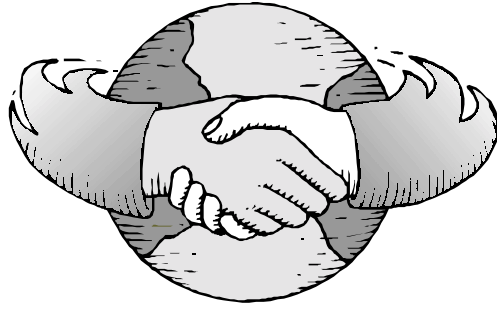


WINGS-CF

2002 Peer Meeting

Sydney, Australia
March 9, 2002

Worldwide INitiatives for Grantmaker Support – Community Foundations



Acknowledgements

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The WINGS-CF 2002 Peer Meeting was held in conjunction with WINGSForum, the meeting for the larger WINGS network. For information relating to WINGSForum (March 10 - 13, 2002 in Sydney) go to www.wingsweb.org.

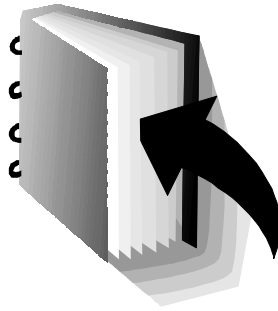
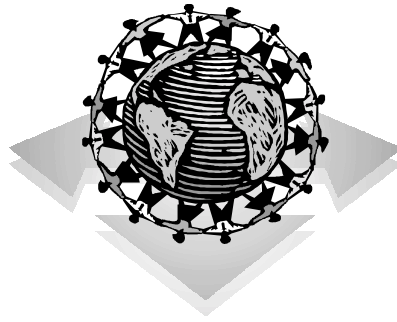


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About WINGS-CF

A part of the overall WINGS network, WINGS-CF includes organisations supporting the development and work of community foundations¹ in different areas around the world. Some of these organisations first came together in 1998 in Miami Beach, USA, the report for which proved to be a useful and popular resource around the globe. The Charles Stewart Mott Foundation (US) provided support to update that report and in April 2000, a new report called *Building the Worldwide Community Foundation Movement* was published. This report includes an exciting piece of work describing *The Growth of Community Foundations Around the World*². The newly named WINGS-CF network came together in Ottawa, Canada in May 2000 and agreed to a set of priorities and activities for the period 2000 to 2002.

The WINGS-CF Secretariat has been hosted by Community Foundations of Canada from 2000 to 2002. In 2003, it will rotate to the European Foundation Centre (Belgium), another participant in the WINGS and WINGS-CF networks.

¹ A community foundation is "an independent philanthropy organisation working in a specific geographic area which, over time, builds up a collection of endowed funds from many donors, provides services to those donors, and makes grants and undertakes community leadership and partnership activities to address a wide variety of needs in the community." (Suzanne Feurt, Council on Foundations, page 7, *Building the Worldwide Community Foundation Movement*, April 2000)

² Written by Eleanor W. Sacks, the report was co-published by the Council on Foundations and WINGS-CF



Welcome and Introductions

Making a Mark on the World

Delegates representing 22 countries gathered early on Saturday morning for breakfast, all having travelled long distances to reach Sydney. Over breakfast Monica Patten, Community Foundations of Canada, and Chair of the WINGS-CF Advisory Committee, welcomed delegates, noting the inspiring, daunting and overwhelming range of interest and experience in community foundations, and in making new connections to enable community foundations to grow.

As a vivid illustration of the worldwide spread of community foundations, delegates

introduced themselves country by country, placing a sticker marking their home on a wall map of the world. Countries represented included: Australia, New Zealand, the UK, Canada, the US, South Africa, Russia, Poland, Slovakia, Mexico, the Philippines, Kenya, Germany, Brazil, Romania, Bangladesh, India, Ecuador and Estonia. This was a truly international gathering, crossing cultures, continents and time-lines. As one delegate remarked: 'I started this journey on Tuesday and I don't know what happened to Thursday.'

Acknowledging the variety of community foundations and community foundation support organisations in different countries, Monica emphasised that the focus of the day was on encouraging, developing and nurturing community foundations 'however we describe them'. To that end part of the day would be spent looking at what had been achieved by WINGS-CF and the organisations participating in it, and part in workshops drawing on and adding to the wealth of knowledge in the room.

Max Legodi, South Africa





Update and Discussion on WINGS and WINGS-CF Activities and Plans

Monica Patten, WINGS-CF

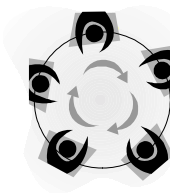
Monica Patten began the session by taking a few moments to focus on the nature of the network. Organisations participating in WINGS-CF support the development and work of community foundations around the world. Some are established and some emerging; all are working in different contexts. What they have in common is an interest in and passion for community philanthropy as expressed through community foundations.

The WINGS-CF network has, since its beginnings, used the shared description of a community foundation in the footnote on page 4. But it was recognised that not all delegates would necessarily recognise themselves in that description. The definition of community foundations is part of an ongoing conversation. A flexible definition will work, it was suggested, if we keep in view a focus on mobilising resources at community level.

Reports and activities had been developed by and for WINGS-CF during 2000 and 2002 to benefit the diverse range of organisations in the network. One such program was the peer exchange, to be described in a session later in the day. A brief report on the activities of WINGS-CF during the past two years was circulated as a way of sharing our significant accomplishments as a network. Monica guided delegates through the report:

WINGS-CF progress and projects to date (May 2000 to spring 2002)

Governance:



- Terms of reference and operating procedures established for the WINGS-CF Advisory Committee, which is composed of a diverse range of organisations from this global network and

relates back to the WINGS Coordinating Committee

- Advisory Committee meetings held by conference call three times each year to review key issues and progress to date; informal contact as needed to stay on top of emerging issues or opportunities
- Terms of reference and working relationships established for WINGS-CF working groups, which guide individual projects and activities. The working group format was selected to echo the very global representation on the Advisory Committee, thereby ensuring excellent participation of the range of organisations and regions in WINGS-CF
- Working groups active with a range of projects, entirely via electronic communications
- Diverse and evolving range of organisations involved in all aspects of WINGS-CF work, through the Advisory Committee, working groups and direct participation in individual projects
- Framework for communications with WINGS-CF network established, maintained and reviewed

Projects:



- **Mapping of Funders Report** - a confidential report to the WINGS-CF network detailing funders of 12 organisations supporting community foundations around the world, during the period 1996 – 2000 (April 2001)
- **Compendium of Resource Materials for Community Foundations** – a searchable, on-line index of materials developed for community foundations by the organisations supporting them (July 2001)

We have so much in common... and I did not come expecting this.

– Bill King, Minnesota, US

- A series of eight **case studies** of organisations supporting community foundations, including an overview with key trends and findings (first published on the Web in December 2001; due to be published in print with WINGS case studies and a monograph in 2002)
- **WINGS-CF Web site** - designed as a sub-site of the main WINGS Web site. The WINGS-CF site houses contact information for the WINGS-CF network, background on WINGS-CF, the various products and services described here, and current information on activities in WINGS and WINGS-CF (December 2001)
- **Directory of Organisations Supporting Community Foundations** – an on-line searchable database which houses general contact information, as well as details for each organisation on its governance, staffing and finances, and the services it offers to community foundations (May 2002)
- **Peer exchange program** – a pilot program for peer exchange in the WINGS-CF network, the first visit between two organisations took place in January 2002. The approach used is being reviewed for implementation in 2002 and beyond with other network participants.
- Global report on **affiliates and other models used by community foundations for covering territory** (May 2002)

Management and finances:



- Diverse range of consultants recommended by WINGS-CF organisations used to apply their skills to the development of WINGS-CF projects.
- Positive feedback received from network and other participants on WINGS-CF “working style”, communications routines, and overall effectiveness
- Annual budget established and met for WINGS-CF activities, as a part of larger WINGS budget
- Funds raised for aspects of WINGS-CF activities, in addition to main WINGS fundraising efforts

Leadership and positioning:



- WINGS-CF Advisory Committee approached by a funder to oversee and host a first-ever global meeting for community foundation and support organisation representatives on an issue of shared importance (planned for 2004, this is not a WINGS-CF event, although the Advisory Committee will offer leadership and planning energies)
- WINGS-CF, along with the larger WINGS initiative, increasingly mentioned and profiled in third sector media, helping to raise awareness of global community foundation development and the activities of support organisations
- WINGS-CF Secretariat increasingly turned to for source information on

organisations supporting community foundations and international enquiries on community-based philanthropy

WINGS-CF activities for the remainder of 2002³



When the WINGS-CF network met in May 2000, participants agreed a number of priorities for the period 2000 to 2002. During the remainder of this year, attention will go into completing the projects agreed and to preparing for the Secretariat's rotation in 2003. Specific activities will include:

- A report from the WINGS-CF 2002 Peer Meeting will be prepared, posted on the Web site and disseminated [this report]
- The newest participants in the WINGS-CF network will be encouraged to add their information to WINGS-CF projects such as the Compendium and the Directory, and will be further incorporated into network activities
- The Compendium of Resource Materials for Community Foundations will continue to be expanded throughout 2002
- The Directory of Organisations Supporting Community Foundations, available on-line from spring 2002, will grow with additional and updated information from network participants
- The peer exchange program will continue, and additional matches between peer organisations will take place (up to four in total for the year). Electronic

³ As a result of discussions begun at this meeting, it has been agreed that during 2002 WINGS-CF will also undertake a minor project related to classifying and organising resource materials, and operate a translation fund for the benefit of WINGS-CF organisations.

methods for discussion and information sharing will also be explored as part of this program

- The case studies and the report on affiliate-like models will be more widely disseminated and promoted
- Work related to the management, governance and rotation of WINGS-CF will continue

Open discussion

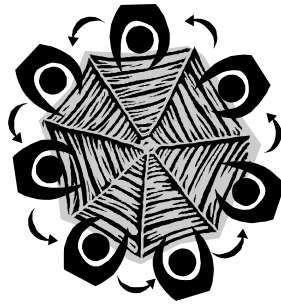
In the open discussion following Monica's presentation, delegates noted the value of WINGS-CF as a means of two-way learning and support. Questions were raised about plans for evaluation of the network as a whole and its vision.

It was reported that in addition to the constant feedback for learning received by the network secretariat, WINGS-CF is being evaluated in the context of a wider evaluation of WINGS. There are plans for greater integration of WINGS-CF with WINGS, which until now, have for historical reasons, been two separate administrations. In order to strengthen the entire network WINGS and WINGS-CF will be brought together, with continuing high attention to community foundation development. Over the next eight months, WINGS-CF with WINGS will engage in a strategic planning initiative for 2003-2006. The role of WINGS-CF will continue to focus on nurturing organisations to support the rapidly developing community foundation movement. The co-habitation of WINGS and WINGS-CF will also foster work to develop a better dialogue between community foundations, traditional funders and associations of grantmakers, overcoming the tendency for community foundations to be seen as fundraisers.

Other issues raised in discussion included the challenge to demonstrate community foundations' roles in social and economic development to business, as well as governments. In the developing world, community foundations may be a means of putting responsibility back into communities, overcoming the legacy of colonialism and the expectation that government will do it all. Community foundations may also have a role in managing international donor relationships in ways that recognise local identity and control.

Globalisation poses new challenges for community foundations, as organisations based on the concept of communities with borders, to identify a theme of global importance and to grow without losing identity with local communities. But in attending to the 'big' issues, the importance of WINGS-CF as a place to 'support the supporters', sharing experience and day to day practice matters, should not be overlooked.

A point made earlier in the day about citizens taking an active role in countries with changing governments/emerging democracies is relevant to all of us, and helped to set the tone for the meeting.



WINGS-CF Peer Exchange:

Pilot program and implications for the full network program in 2002 and beyond

Facilitator: Diana Leat, consultant to WINGS-CF

Resource People: Marcos Kisil, Institute for the Development of Social Investment (IDIS), Brazil; Monica Patten, Community Foundations of Canada.

This session focused on providing some early feedback on the first peer exchange, a mechanism for matching two organisations through a visit of seven to 10 days by one organisation to the other. The idea of exchanges came out of the last WINGS-CF meeting in Ottawa in 2000. Organisations at that meeting recognised that, whatever their other differences, by definition they share an interest in supporting community foundations. WINGS-CF is composed of constantly learning organisations and the peer exchange was seen as one way of putting mutual learning into practice – sharing problems and solutions rather than each discovering the wheel alone.

The first exchange took place in Ottawa, Canada in January 2002, between Community Foundations of Canada and the Institute for the Development of Social Investment (IDIS) of Brazil – in some respects

very different organisations working in diverse environments.

Diana Leat introduced the session by thanking all those who participated in the production of the eight case studies of community foundation support organisations, and outlining the way in which they relate to the peer exchange programme. The range of differences between community foundations, their environments and the organisations supporting these foundations raise some important questions regarding the value of exchanges and in particular choice and matching of participants, and the amount of prior contact and briefing required before the exchange takes place:

- What criteria, in addition to prior trust and understanding, are important in matching organisations?
- How similar *and* how different should partnered organisations be?

- At what stage in the organisation's life cycle/development are peer exchanges likely to be most useful?

In each stage – start-up, capacity building, sustainability - community foundations and support organisations may have very different needs which may not be of immediate interest or concern to organisations at a different stage of development. Age and stage factors may be important in the choice of individual exchange participants. Other questions may arise for consideration, such as: Are senior staff likely to give and get more from an exchange than other staff members?

One of the key challenges emerging from the case studies was the need to build a strong and committed board. The importance of getting the Board familiar with and to support new ideas and approaches is well recognised, and it was suggested that Board exchanges might be something to explore in WINGS-CF.

This raises one of the most important issues concerning the exchanges – what

lasting organisational learning do they create? Organisational learning often gets lost in the pressure of day-to-day events, and the hugely powerful pressures of leaving things much as they are. Real commitment and understanding from the Board may be an important factor in avoiding loss of real organisational learning. Lasting organisational learning is one of the criteria against which the exchanges will be assessed over the next few months but other less tangible benefits will also be recognised.

Marcos Kisil, IDIS, spoke enthusiastically about the value of the IDIS-CFC exchange and presented his view of the key elements of a successful peer exchange. These included:

- Peer to peer respect
- The need for experienced people to participate in the program
- A common agenda and clear objectives
- A common project and a common vision
- Reciprocity – providing an enriching learning experience for both parties. 'If we'd just been receiving it wouldn't have felt half as good'.

(L-R) Rory Francisco Tolentino, Francis Maravilla, Norman Joseph Jiao, (Philippines), Lubica Macedo (Slovakia)



IDIS now hope that CFC staff will be able to visit IDIS and more fully understand the Brazilian environment.

Monica Patten, Community Foundations of Canada, emphasised the value of the exchange and agreed with Marcos' points about the elements associated with that success. Monica added some factors as host organisation:

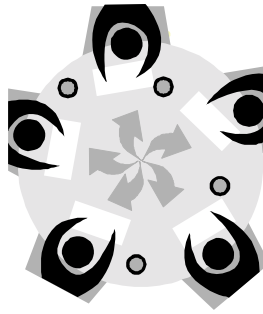
- The value of the evaluation process and questions in planning and preparation for the exchange
- The logistical demands on the host organisation, including 'just finding the time to do it'.
- The importance of drawing colleagues into the planning process, even though this takes time.

- The value of building the exchange programme on existing events and commitments.
- Taking the time to position the visit as worth doing in the eyes of the Board
- Building in time and space for reflection and relaxing.
- The value of the exchange in providing an alternative perspective and challenge to 'the way we've always done things'.

The comments and questions raised by participants during the session illustrated the great support for the peer exchange format. This enthusiasm and the learnings from the pilot program will be applied to the development and delivery of further matches in 2002 and beyond.

*I have no doubt that all communities in the world
have community foundations in some sense.*

– Noshir Dadrawala, India



Report Back from Workshops

Facilitator: Diana Leat

During the day, two sets of three workshops were run, each providing an opportunity for learning and exchange on topics of practical interest for the organisations taking part. Five key themes emerged from the brief reports on each of the workshops:

The importance of education about philanthropy and the roles of community foundations. This involves developing, accessing and disseminating facts, evidence and, importantly, vivid stories and examples about the value and achievements of community philanthropy.

The value of WINGS-CF as a means of sharing learning and supporting the supporters, via face to face peer exchanges and electronic and paper communication. Sharing learning raises difficult issues of matching for peer exchanges and designing systems to collect and access information. Sharing learning also involves distinguishing between 'nice to know' and 'need to know' information. This in turn raises important questions about the role of WINGS-CF, as distinct from that of other bodies including WINGS. One role for WINGS-CF may be to identify a basic library of materials relevant and necessary to all community foundations.

The need to recognise the diverse membership of WINGS-CF, the variety of cultural, economic, legal and historical environments in which they work and the different languages, models and meanings of community philanthropy they adopt. To aid understanding and real communication it may be useful for WINGS-CF to explore development of a glossary of terms used including differences in their meaning between countries.

The need to acknowledge the differences between participants' needs. Organisations at different ages and stages may face different issues and have very different needs.

The need to accept WINGS-CF's own age and stage of development. In its early stages it is important that WINGS-CF develops its own sense of community by focusing on the common needs and interests of its members. At a later stage, when the bonds of trust and confidence have been established, it may become as important to openly explore differences.



Key Learnings

for WINGS-CF participants and WINGS-CF activities

At the end of the day, participants were invited to join one of two rooms to discuss key learnings emerging from the meeting. Learnings focused largely on key points to inform WINGS-CF activities, from the perspective of newer and more experienced organisations in the network.

Experienced WINGS-CF participants

Facilitator: Luis Amorim,
WINGS-CF Advisory Committee member

Key points for WINGS-CF:

- Communicating to and *within* (e.g. board members) each organisation in WINGS-CF what a tremendous resource WINGS-CF and WINGS are.
- How to disseminate WINGS-CF information to community foundations?
- The WINGS-CF peer exchange program is excellent and should be developed further.
- Sharing best practice on fund development is wanted and needed.
- Research on how to promote philanthropy and its culture around the world is needed.
- Current WINGS-CF research on affiliates and other models for covering territory should include research into how to handle competition between two community foundations with the same/crossover territory.
- How WINGS-CF and its various participant organisations relate to global agencies such as the World Bank, European Union. How can we work together to explain the delicacy of community philanthropy and its processes?
- How to articulate the community foundation concept to funders of support organisations (government, etc.). What are the common features/themes/premises that we share which would help illustrate this, that also allow for incorporating differences in local culture/circumstances?
- How international grantmakers can help to mobilise national/private funders for the movement (using peer pressure).
- Articulating regional networking with global networking.
- Looking at the post technical assistance period (for community foundations) = independence/sustainability.

- The challenge of language (expand on current reflection).

Newer WINGS-CF participants

Facilitator: Gaynor Humphreys,
WINGS-CF Advisory Committee member

Key learnings identified by this group of new WINGS-CF participants included:

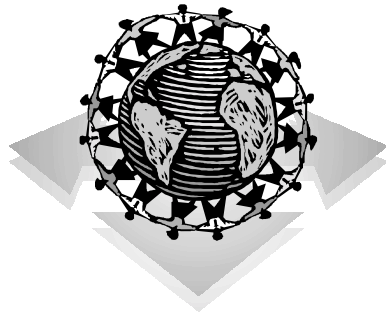
- The need to be aware of language barriers to the development and reach of WINGS-CF. If WINGS-CF's mission is to share experience across boundaries it needs to explore ways in which it can cater for non-English speakers.
- The need to avoid importing foreign models of community philanthropy into contexts in which they have little relevance. For example, the emphasis on endowment building can be very discouraging for countries beyond North America.
- The need for research documenting different models and contexts of community foundations, including models in rural areas in developing countries and methods of sustainability which do not depend on endowment building.
- Regional groupings and exchanges may be of value, enabling organisations working in similar cultural and economic contexts to share and develop experience. The value of peer exchanges within regions should be explored before entering into exchanges between very different, and geographically distant, countries.
- The need for flexibility and inclusiveness in WINGS-CF membership and activities. 'Instead of closing doors to organisations we need to look at ways of opening doors'.

David Winder, US, and Martine Foster, New Zealand



Support organisations have a role in educating government how to step away – how to give and to trust in local organisations.

*– Gaynor Humphreys
United Kingdom*



Conclusion

It is difficult to capture in words the day's sense of adventure, challenge and excitement. There was a feeling that having travelled to the New World, delegates were literally and metaphorically exploring new worlds – a challenging and exhausting but hugely satisfying journey. The journey was a rich, supportive and generous experience, exchanging common challenges and solutions, as well as beginning openly to explore differences. The discussion, in sessions and over lunch and coffee, provided a strong foundation for real openness and learning within WINGS-CF, developing the courage to move beyond the security of blue-prints, grappling with difficult issues and moving to acceptance and celebration of differences.

The destination

One of the day's recurring themes concerned community foundation *destinations*. Vision and mission are the foundation of policies and strategies for both fund raising and fund dispersal. Several workshops emphasised that community foundations are more than just a means of raising money, highlighting the importance of community foundations as means of community involvement, of democratising and growing philanthropy in the community. Citizens and communities have assets other than money and community foundations need to help identify and recognise these, encouraging people and organisations to see themselves as community resources rather than only donors.

WINGS-CF needs to embrace a variety of destinations. For example, the North American model of community foundations may have limited relevance in some places, including societies in transition and in rural areas.

Starting points

The diversity of starting points for the community foundation journey also needs to be recognised. A number of delegates made the distinction between cultures of giving and cultures of organised philanthropy – the former may be strong but the latter weak. Similarly, the concept of community may have different meanings and pose different challenges in societies characterised by racial, religious and linguistic divides. The challenge is to build on existing starting points and cultures rather than attempting to import foreign travel itineraries and destinations.

In many societies building an endowment is a desired, and sometimes distant, destination – an objective – rather than a starting point or condition. The distance to the destination should not be allowed to discourage people from undertaking the journey.

Community foundations not only start from different places in terms of history, culture, wealth and poverty and politics, they are also at different points on their journeys. Some are exploring the viability of building the plane, some are building the plane but don't know yet if it will fly, some have taken off and are beginning to climb, others have reached cruising height but still worry about sustaining that. Each of these stages poses different challenges and create different needs which need to be recognised within WINGS-CF.

Provisions for the journey

The community foundation journey can be long and is rarely, if ever, easy. The journey needs planning and provisions. The importance of education was emphasised again and again. Donors, potential donors, their advisors, the media, businesses, governments, other agencies and citizens all need to be educated about the concept, potential and practices of community foundations.

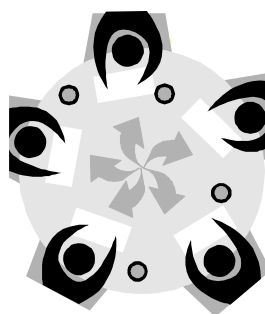
The importance and value of supportive travelling companions was also emphasised. The electronic and paper based information and support, as well as opportunities for face to face meetings, provided by WINGS-CF were seen as essential provisions for the often lonely and long community foundation journey.

Two specific tasks for WINGS-CF in supporting the promotion and sustainability of individual and collective community foundations' journeys were suggested. One was to explore development of a glossary of key terms and concepts to aid understanding and communication between fellow travellers. The other was to explore, recognising cultural and other differences, the creation of a set of core materials that every community foundation traveller should possess.

Another suggestion for WINGS-CF was to explore provision of opportunities for regional groupings and exchanges as an addition or alternative to global/inter-continental exchanges.

Sharing the journey

Monica Patten noted at the beginning of the day the worldwide wealth and diversity of experience and knowledge gathered together for the day. The plenary sessions and, in particular, the workshops amply demonstrated this wealth of experience as delegates shared both theory and practical tips in a real spirit of equality and generosity. We hope that this report captures the richness of discussion and sharing around both the 'big' and the day to day practice issues for the benefit of both those who attended and others in the network who were unable to.



Workshop Notes

Workshop 1: Tools of the trade – how to manage, organise and share information

Facilitator: Marcos Kisil, Institute for the Development of Social Investment (Brazil)

Resource People: Ruth Jones, Philanthropy Australia; Dagne Forrest, WINGS-CF



Marcos began the session by outlining the diversity of community foundation environments and structures, the variety of disciplines from which community foundations draw their knowledge and the problems of language. All of these factors highlight and complicate the need to make knowledge for practice fully accessible via a workable classification system.

Classification is a tool to identify and access what we know and what we don't know. Classification should allow what starts as individual knowledge to become organisational and then wider institutional knowledge.

Dagne described how the 2000 WINGS-CF Peer Meeting had identified the need for a Compendium of Resource Materials – an index of material for and about community foundations. The Compendium is now in operation but has highlighted the difficulties of devising a classification system that best works for all members. WINGS-CF has recently contracted a US consultant, Barbara Long, who has experience in community foundations, to look at who is doing what in relation to classification of community foundation resource materials and to consult with the International Federation of Library Associations on global classification projects.

Ruth outlined Philanthropy Australia's experience of devising a strategy for management of information. Philanthropy Australia had a mass of information but no in-house information professional. Only one person knew where everything was. In order to provide proper staff and member support, as well as satisfying the demands of the media and researchers, Philanthropy Australia obtained a grant to radically revise its paper and electronic retrieval systems. The strategy used various elements including identifying who has what material, with a view to

developing a co-ordinated information referral and sharing system, and a coherent collection development policy building on the specialism of each institution. Having decided to adapt the US Foundation Center's classification system to the Australian context, Philanthropy Australia began the time consuming task of classifying and 'weeding' its entire collection. The Philanthropy Australia catalogue was then put onto the National Library of Australia database with links to international indices and databases.

The benefits of this 18-month \$45,000 USD task include:

- A searchable catalogue on the Philanthropy Australia Web site
- Participation in Inter Library Loans
- Ease of access to information
- Better informed advocacy
- A sound information base for professional development and training
- Greater visibility and a better service for members and for research institutions.
- New national and international relationships

In addition to the costs of creating the system there will, of course, be costs to maintain it. Philanthropy Australia is exploring ideas for charging fees for information services to financial advisors to wealthy people, research and educational organisations, but also recognises that no library in the world breaks even.

A number of issues were raised in the open discussion that followed the presentations above. These included:

- Issues in organising paper and electronic based information and the need for up to date coverage of journals and the media. It was agreed that the Internet could never fully replace paper.
- The importance of having a library science/information professional on the staff to sieve the mass of information available.
- The value of applying a classification system to hard and soft internal files, and bringing internal, Internet and library information together.
- The complexity and cost of tagging documents – 'the whole process is a piece of string with no end in sight'.
- At what stage a support organisation needs a sophisticated classification system, and how much of its limited resources it should devote to this.
- The difficulties of prioritising within a long, slow task from which the benefits are not immediately apparent.
- The need to distinguish community foundation specific material and wider information regarding philanthropy.
- The need to identify and disseminate the base knowledge which all community foundations need, and the role of WINGS-CF in identifying the basic materials all community foundations ought to have in-house.
- The need to recognise that the core literature will depend in part on the stage, mission and

environment of the organisation, as well as which audiences need what sorts of information.

- North American and UK material may not be relevant in all countries.
- Issues of different languages and concepts, and the need for a glossary outlining the variety of meanings of philanthropic terms in different contexts.

Marcos ended the session by suggesting that managing and disseminating information must be part of a continuing discussion and will be on our agenda forever. WINGS-CF will use the learnings from this session to help inform its next steps in developing the Compendium of Resource Materials for Community Foundations, and to decide whether to address the larger issue of classification as a network.

Workshop 2: Serving as a grantmaker: providing financial assistance or acting as an intermediary for grants to community foundations

Facilitator: Olga Alexeeva, Charities Aid Foundation – Russia

Resource person: Gaynor Humphreys, Community Foundation Network (United Kingdom)

Gaynor described Community Foundation Network members as community foundations (according to defined criteria), mostly less than 10 years old. The organisation provides support and services to members in a collegial relationship. Traditionally, Community Foundation Network has acted only rarely as broker of funds to its members.



More recently Community Foundation Network changed its focus slightly with a program of financial assistance to emerging ‘adolescent’ community foundations. This program, entitled *Time for Growth*, is based on a recognition that the first three years of community foundation life are hard, but years four to six can be even harder, not least because at that stage there is a high expectation of results in terms of endowment building. In order to help community foundations move beyond the difficult first phase into positive growth Community Foundation Network obtained a grant of £1 million from a UK foundation. This grant was to be dispersed in ten £100,000 grants with little direction about how to use the money.

The allocation process was competitive. Community Foundation Network set up a selection panel of five independent, knowledgeable organisations and sought applications from its members with less than £5 million in endowment and one full-time staff member. Twenty proposals were received, 12 community foundations interviewed and nine were chosen. Gaynor described this process as a ‘battering experience’. ‘This was a program that risked divisiveness in the network. We think we’ve rebuilt relationships’.

Outstanding questions include the effect of competition for funds on membership associations, and the effect of attraction of funds on the status of a support organisation in the eyes of its members and others. There are also questions about tolerance of risk: are the funder and Com-

munity Foundation Network ready for potential failure of the grants to achieve the stated goal of increasing the endowment of each foundation by £2 million; and would the risk/involvement ratio be very different if the funder were government or a large organisation such as the World Bank?

Gaynor went on to describe her organisation's involvement in new government grantmaking programs focusing on young people and poverty and covering the whole of England. Winning contracts to administer these local grantmaking programs has led Community Foundation Network, which has gaps in its geographical coverage, to rethink its role as a national network with critical mass. Programs currently total £10 million per annum, covering 40% of England and doubling each year. Grants are currently limited to a maximum of £7,000. Requirements, such as having child protection policies in place, imposed by government are likely to increase, and there are implications for management, costs and accountability. Taking on these programs has required five new staff members and the creation of a national management sub-committee.

Before taking on these contracts the Community Foundation Network Board asked three key questions: will the programs cover their own costs? Are the programs a good match with Community Foundation Network member goals? Will community foundations be able to make independent decisions?

Although taking on these programs has increased the visibility of Community Foundation Network locally and nationally, and provided the network with exciting new opportunities, Community Foundation Network is still very undecided about whether this was the right thing to do. There is a danger of conflicts of interest within the organisation, of emerging foundations narrowing their focus and identities, and of depending on state funds (although this last issue is not a major one given the size of grants at local level). On the other hand, the programs enable community foundations to reach out to the smallest groups in some of the most economically deprived areas and gives them considerable discretion as long as they follow the main themes of the programs.

Workshop 3: Asset Development for community foundations: before you give you've got to get

Facilitator: Shannon E. St. John, Community Foundations of America/North Carolina
Association of Community Foundations (USA)



This workshop discussed in very practical ways planning for asset development, raising operating support and raising grantmaking funds.

Planning for asset development involves preparation. 'An organisation cannot raise funds without institutional preparation'. This involves:

- Clarifying vision, mission, goals and objectives

- Administrative and governance structures, policies and procedures
- A three to five-year operating budget
- A knowledgeable resource about the community
- Promoting a community-wide culture of caring and giving
- Determining the foundation's philosophy of relationships with donors
- Determining funding options for donors
- Determining services to donors
- Identifying target audiences for information about the foundation.

Securing operating support has three stages: start-up, survival and sustainability.

Sources of start-up support include: the 'inner circle'; other community leaders; the 'usual suspects'; expatriates; private foundations; international agencies; local government; in-kind gifts; administrative fees.

Sources of survival support include: previous funders; administrative fees; grants to yourself – 'If you don't think your organisation is worthy of your own grants, then close down and give all your money to another organisation'; fees for services; project grants; operating endowment; earned income.

Sources of sustaining funds include: administrative fees; 'float' – investing funds and earning income; operating endowment; earned income/social enterprise; tax revenues. Shannon encouraged participants to 'never just have one source of funds'.

Raising grantmaking funds involves making a case that is clear consistent and consensual. Potential sources of grantmaking funds include: individuals – most wealth resides in the hands of individuals and families; legacies and bequests; companies; other NGOs; foundations; and government.

Three other points were emphasised: the important influence of intermediaries who give advice to donors; although endowments have the advantages of credibility, permanence and independence but they are not the only sources of funds for community foundations; the community foundation's vision determines its priorities and the types of funds it seeks to raise and disperse.

It was worth it to come to Australia just for this session.

Workshop 4: Providing technical assistance to emerging community foundations: issues and choices

Facilitator: Max Legodi, Southern African Grantmakers' Association (South Africa)

Resource People: Jorge Villalobos and Lourdes Sanz, Centro Mexicano
Para la Filantropia A.C. (Mexico)



Jorge situated the session by noting that Mexico has a strong culture of giving but not a strong culture of organised philanthropy. More recently, foundations have been introduced to the concept of community philanthropy through workshops and conferences.

One of the most important achievements in Mexico has been the consolidating work undertaken by a group of 20 community foundations that has been working together to strengthen their individual organisations. The most difficult challenge facing them all continues to be promoting a culture of organised philanthropy in the community to underpin fundraising.

Funding from the Charles Stewart Mott Foundation has been critical in enabling CEMEFI to develop institutional expertise through a variety of services, including:

- promoting the value of philanthropy and encouraging a culture of philanthropy, and
- adding a new full-time staff member who offers institutional support to community foundations (co-ordinating technical assistance, encouraging creation of new community foundations, sharing experience).

Despite some of the barriers to organised philanthropy there are opportunities for endowment building and for regional distribution of government funds. Discussion amongst participants revealed that the Philippines shares Mexico's experience in having a strong civic society and strong influence from the Catholic Church, and that opportunities are still being explored for developing community foundations.

Max described SAGA's role as encouraging and supporting development of community foundations in South Africa since 1998, through a process based on the selection of pilot communities, creation of interim steering committees and finally, legal incorporation of the foundations. SAGA provides direct technical assistance: mentoring and coaching; on-sites; support for staff and committees; a pool of resource providers and where necessary, their "re-orientation"; peer learning opportunities, visits and sister relationships, as well as international conferences. To date four community foundations are up and running with endowments, two of these have already made grants, and six more are in the process of development.

One of the key issues raised in discussion was whether endowment, or some other factor, is most critical in successfully starting and keeping a community foundation going. SAGA's experience has been that having initiated the process of community foundation develop-

ment has led to individual community initiatives, suggestion of a donor partner and a program of SAGA inducement; these factors led to the SAGA pilot program for developing community foundations.

Facilitating factors in starting community foundations were identified as: getting champions involved; defining and identifying sources of technical assistance; mentoring and coaching; resource providers and peer learning opportunities. Other helpful tips included: visiting established community foundations; encouraging sister relationships; attending international conferences, and avoiding dependency.

“How do we guide without manipulating?” and “What value do community foundations add to the NGO sector?” were two of the key questions raised in this workshop.

Workshop 5: Exploring new territory: bringing community foundations to new regions and communities

Facilitator: Luis Amorim, Community Philanthropy Initiative of the European Foundation Centre (Belgium)

Resource person: Pushpa Sundar, Sampradaan – Indian Centre for Philanthropy (India)



The core objectives of this workshop were to learn about the promotion of community philanthropy in new regions; share tips on marketing; and learn from each other.

Pushpa began by noting that historically Indian culture has placed more emphasis on individual, informal philanthropy than on organised grantmaking. Sampradaan – the Indian Centre for Philanthropy – is five years old and has 15 members, including the only community foundation in India. Sampradaan aims to grow the knowledge base of philanthropy, to promote networking, donor education, community foundations and giving as a form of self-reliance.

Developing community foundations in India faces various challenges including lack of familiarity with the concept, and lack of relevance in rural India. Because rural India has a strong and old tradition of community philanthropy, people often cannot see the benefit of new forms of local philanthropy, such as community foundations, where focus is put on endowment building and more efficient ways of giving. The Village Development Fund – an indigenous experiment giving funds to villagers, encouraging and expecting contributions from the villagers in addition – provides a promising model. Sampradaan’s future challenges include spreading and supporting the growth of these funds by other entities; and building critical mass of activity and interest in community foundations.

Moral support is not enough to engage national, private funders.

Another fundamental challenge is that there are so many religious and linguistic communities in India that the concept of community and community philanthropy in India is unclear. 'One has to be very clear that community philanthropy is about a geographic community' Pushpa emphasised.

If you find an effective instrument, stick to it!

*Endowment
is an objective,
not a condition.*

Luis noted that the experience of promoting community foundations in Europe has been somewhat different. In Europe there has been 25 years of community foundation development, beginning in the United Kingdom. Community foundations in Europe have grown from 95 in 2000, to 225 in 2002, in part as a result of the EFC's Community Philanthropy Initiative (CPI). However, the 225 community foundations in Europe are diverse, with a majority taking a form halfway between traditional community foundations and local organisational formats.

Lessons from developing community foundations in new areas include:

- Avoiding the 'foreign import syndrome' – building on existing community philanthropy culture and history rather than promoting US models
- The importance of listening to the community, encouraging participation and identifying and nurturing interested local leaders
- Providing the instruments for practice
- Identifying where the money will come from
- Making sure that endowment is seen as an objective and not as a condition
- Where existing NGOs perform some community foundation functions it is important to consider how these organisations can be encouraged to develop further in line with existing models of community philanthropy
- Developing a five-step marketing strategy for community foundations: gathering information; developing strategy; producing tactics; implementing activities; monitoring and adjustment.

Workshop 6: Promotion of philanthropy from the community foundation perspective

Facilitator: Vivian Blair, Espiral Consultora, S.C. (Mexico)

Resource People: Nancy Roberts, Connecticut Council for Philanthropy (USA);

Lubica Macedo, Open Society Foundation – Bratislava (Slovakia).



Lubica began the session by introducing a series of factors that influence the development of philanthropy: the degree of development of organised philanthropy; motives for individual and business giving; levels of corporate giving;

promotion of philanthropy at local and national levels; innovative ways of promoting philanthropy, competitors and available tools.

Nancy presented community foundations as a way of democratising philanthropy, emphasising the importance of mission statements that focus on growing philanthropy in the community rather than simply raising money. This means recognising that organisations can be both donors and community resources. Philanthropy is not just about giving money.

To promote philanthropy through community foundations in Connecticut, the Connecticut Council for Philanthropy:

- worked closely with advisors to donors – insurers, investment advisors, solicitors and so on – educating them to help their clients and the community;
- worked in collaboration with a national campaign ‘Leave a Legacy’, overcoming cultural barriers to talking about death, identifying ‘Legacy Landmarks’ such as the Carnegie libraries, and providing public information leaflets with a map of community foundations;
- started ‘field of interest’ foundations focusing on topics on which there would be a lot of interest e.g. women, the environment;
- told stories illustrating the way in which philanthropy has affected both donors and recipients.

In Slovakia – a society in transition with a lack of stable financial systems – work has focused on:

- educating donors and potential donors about opportunities to give and the benefits of doing so
- reviving old traditions of giving by providing examples
- overcoming suspicion about giving and lack of trust in NGOs by working with local government on joint funding schemes.
- seminars in high schools to involve younger and potential future donors
- changes in legislation to encourage philanthropy
- offering a community foundation service to businesses who tend to have no strategy regarding corporate giving, and preparing a brochure about NGO activities to educate business
- persuading the media to take an interest in philanthropy
- providing support to understaffed small community foundations.

Vivian emphasised the importance of building on the existing culture of philanthropy in a country. In Mexico, community foundations present themselves as vehicles for citizen involvement: private citizens learning to participate in the life of their communities with their time, their talents and economic resources. However, community foundations are hampered by a deeply rooted expectation that the government or the Church will provide. Education is critical in promoting citizen involvement and community foundations. As Vivian said ‘Education should be a line item on the budget’. Over time endowment building may be possible but ‘Endowment building must come as a result of involvement and commitment to the community’ through non-profit organisations.

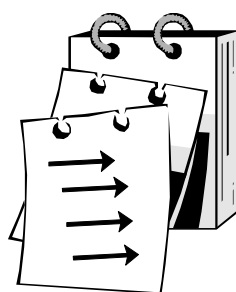
With support from the Charles Stewart Mott Foundation – ‘What would we all do without Mott?’ – a partnership has been established to develop a practice of institution building in which development is not seen as a linear process but rather as an interconnection of vision, mission, goals objectives, resources, and the organisation. Espiral Consultora is currently running a workshop program on institution building with four community foundations in the state of Guanajuato. One condition of participating in the program is that Board members, as well as staff, are involved. One expected outcome, is that these community foundations will be able to generate revenue by offering institution-building programs to NGOs.

Issues raised in discussion included the need to develop new, creative and flexible models and theories of philanthropy promotion related to local cultures and circumstances, recognising the distinction between giving and organised philanthropy and building on giving impulses that already exist rather than imposing new and foreign models.

Another theme was the need to remember that philanthropy is a means of supporting the community not an end in itself. Communities need help to identify their non-financial assets and create stories that generate pride and a sense of community. It was also suggested that philanthropy is more often about reciprocity than altruism and that needs to be built on in, for example, involving businesses in the community. For example, one community foundation has negotiated reduced rates for NGOs on a range of products.

The value of cross-sector, challenge and matching funding schemes encouraging corporations and others to give were acknowledged, as was the importance of having untied resources to maintain independence.

Philanthropy is not just about giving money.

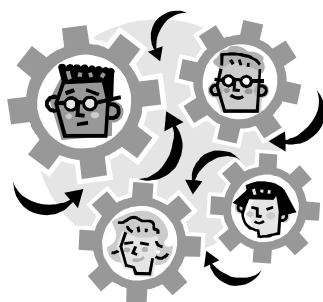


2002 WINGS-CF Meeting Agenda

Hotel - Y on the Park, Sydney, Australia – Saturday, 9 March 2002

Time	Program element
7.30 – 8.00am	Registration for WINGSForum and the WINGS-CF 2002 Peer Meeting
8.00am	Escorted walk to WINGS-CF Peer Meeting site
8.30 – 9.30am	Breakfast – to include welcome and brief introductions by all participants <i>Facilitator: Monica Patten, WINGS-CF</i>
9.30 – 10.15am	Update and discussion on WINGS and WINGS-CF activities and plans <i>Facilitator: Monica Patten, WINGS-CF</i>
10.15 – 11.15am	WINGS-CF Peer Exchange: Pilot Program and implications for full network program in 2002 and beyond <i>Facilitator: Diana Leat, consultant to WINGS-CF</i> <i>Resource people: Marcos Kisil, Institute for the Development of Social Investment (IDIS); Monica Patten, Community Foundations of Canada</i>
11.15 – 11.30am	Refreshment Break
11.30am – 1.00pm	Workshops 1, 2, 3 (learning opportunities)
1.00 – 2.00pm	Lunch (informal conversations, etc.)
2.00 – 3.30pm	Workshops 4, 5, 6 (learning opportunities)

3.30 – 4.00pm	Refreshment Break
4.00 – 4.45pm	Report back from workshops to whole group (i.e. key points and learnings covered in each of the workshops) <i>Facilitator: Diana Leat, consultant to WINGS-CF</i>
4.45 – 5.30pm	Key learnings for experienced WINGS-CF participants and WINGS-CF activities <i>Facilitator: Luis Amorim, WINGS-CF Advisory Committee member</i> Key learnings for new WINGS-CF participants and WINGS-CF activities <i>Facilitator: Gaynor Humphreys, WINGS-CF Advisory Committee member</i>
5.30 – 7.00pm	Free time
7.00pm	Coach transfer to Cafe Sydney, for dinner
7.30 – 10.00pm	Dinner at Cafe Sydney, overlooking the harbour (informal, catching up with colleagues)
10.00pm	Coach transfer back to the Sheraton on the Park



List of Participants

	Participant	Organisation
Australia	Ms. Ruth Jones	Philanthropy Australia
Bangladesh	Mr. Iftekhar Zaman	Bangladesh Freedom Foundation
Belgium	Mr. Luis Amorim	European Foundation Centre
Brazil	Dr. Marcos Kisil	Institute for the Development of Social Investment
Canada	Ms. Monica Patten	Community Foundations of Canada and WINGS-CF
	Ms. Dagne Forrest	Community Foundations of Canada and WINGS-CF
Ecuador	Mr. Boris Cornejo	Esquel Group Foundation
Estonia	Ms. Ms. Mall Hellam	Open Estonia Foundation
Germany	Mr. Christoph Mecking	Bundesverband Deutscher Stiftungen e.V.
	Mr. Tobias Henkel	Bundesverband Deutscher Stiftungen e.V.
India	Mr. Noshir Dadrawala	Centre for the Advancement of Philanthropy
	Ms. Pushpa Sundar	Sampradaan - Indian Centre for Philanthropy
Kenya	Ms. Monica Mutuku	Kenya Community Development Foundation
	Ms. Katharine Pearson	Ford Foundation
Mexico	Mr. Jorge Villalobos	Centro Mexicano Para la Filantropia A.C.
	Ms. Lourdes Sanz	Centro Mexicano Para la Filantropia A.C.
	Ms. Vivian Blair	Espirale Consultora, S.C.
New Zealand	Miss Judith Timpany	Philanthropy New Zealand
	Mr. Peter Wyatt	Philanthropy New Zealand
	Ms. Martine Foster	Philanthropy New Zealand
Nigeria	Mr. Kayode Samuel	Enterprise for Development International
Philippines	Mr. Francisco Maravilla	Association of Foundations - Philippines
	Mr. Norman Joseph Jiao	Association of Foundations - Philippines

	Ms. Lydia S. Enrile	Association of Foundations - Philippines
	Ms. Aurora Francisco Tolentino	Ayala Foundation, Inc. and the
		Association of Foundations - Philippines
Poland	Ms. Klara Kopcinska	Academy for the Development of
		Philanthropy in Poland
Puerto Rico	Mr. Nelson Colon	Institute for the Development of
		Philanthropy
Romania	Mr. Laszlo Potozky	Romanian Donors' Forum
Russia	Ms. Olga Alexeeva	Charities Aid Foundation – Russia
Slovakia	Ms. Lubica Macedo	Open Society Foundation - Bratislava
	Ms. Stanislava Slaninkova	Open Society Foundation - Bratislava
	Ms. Alena Panikova	Slovak Donors Forum
	Ms. Zuzana Franova	Slovak Donors Forum
South Africa	Mr. Max Legodi	Southern African Grantmakers'
		Association
United Kingdom	Ms. Sharon Stearnes	Charities Aid Foundation
	Mrs. Gaynor Humphreys	Community Foundation Network
	Ms. Helen Moss	Community Foundation Network
	Dr. Diana Leat	WINGS-CF
USA	Ms. Betsy S. Nelson	Association of Baltimore Area
		Grantmakers
	Mr. Michael Seltzer	Business Enterprises for Sustainable Travel
	Mr. Elan Garonzik	Charles Stewart Mott Foundation
	Ms. Shannon E. St. John	Community Foundations of America
	Ms. Nancy P. Roberts	Connecticut Council for Philanthropy
	Ms. Gina Estipona	Council on Foundations and WINGS
	Mr. Bill Walker	Council on Foundations and WINGS
	Ms. Jayne Millar Wood	Council on Foundations and WINGS
	Ms. Valerie S. Lies	Donors Forum of Chicago
	Ms. Alison Wiley	Forum of Regional Association of
		Grantmakers
	Mr. Bill King	Minnesota Council on Foundations
	Mr. David Winder	The Synergos Institute
	Ms. Kae Dakin	Washington (DC) Grantmakers
Evaluators	Ms. Libby Cooper	Charities Evaluation Services International
	Mr. Barry Knight	Charities Evaluation Services International

For contact details, go to the WINGS-CF Web site, via www.wingsweb.org

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