

CONFERENCE REPORT



WINGS FORUM 2014

THE POWER OF NETWORKS

**27-29 March, 2014 • Point Hotel Barbaros
Istanbul, Turkey**

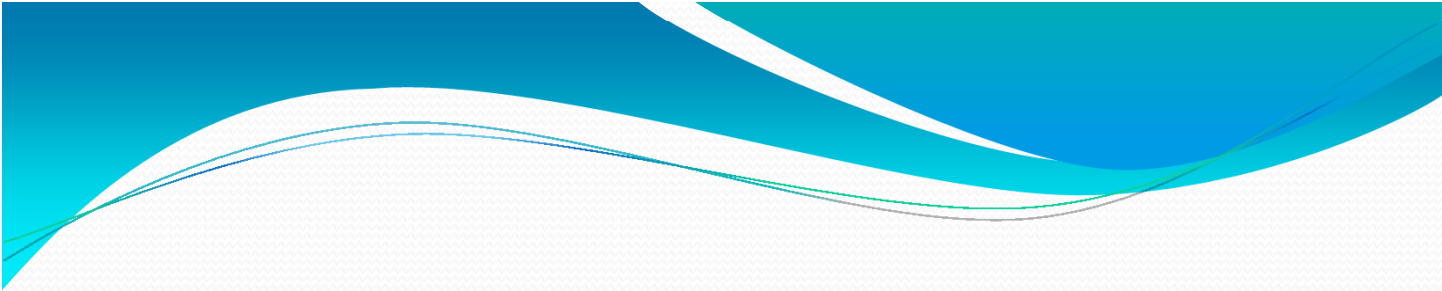


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Overview

From 27-29 March, 2014, 174 WINGS members, network participants, funders, and peers in the philanthropic sector convened for WINGSForum 2014. Held at the beautiful Hotel Point Barbaros in Istanbul, Turkey, the event was co-hosted by the Third Sector Foundation of Turkey, or TUSEV. Within TUSEV, a host committee comprised of the Anadolu Foundation, Aydın Doğan Foundation, and Sabancı Foundation formed to fund and promote the event alongside WINGS.

Held every four years since its inception in 1998 (then known as the IMAG Meeting), WINGSForum is the flagship global gathering of the Worldwide Initiatives for Grantmaker Support (WINGS). At the conference, staff and board members of grantmaker associations and philanthropy support organizations in the WINGS network come together for a unique opportunity to interact with peers, learn from one another, address challenges, and explore possibilities for collaboration. As the only existing conference with a focus on the infrastructure of global philanthropy, WINGSForum is able to connect and affect change across many issues facing the sector today, such as data, accountability, and transparency.

WINGS is a meta-network and its growth attests to its success, but what wider effects does it have? And what can philanthropic networks contribute to the greater issues of the day? These questions echoed throughout the two and a half days of the proceedings, culminating in a mock 'trial' of associations held on the last morning of the Forum.

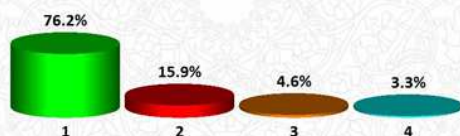


WINGSForum 2014 participants at the conclusion of the conference.

Participants

How many WINGSForum conferences have you attended?

1. This is my first time!
2. 2
3. 3
4. 4

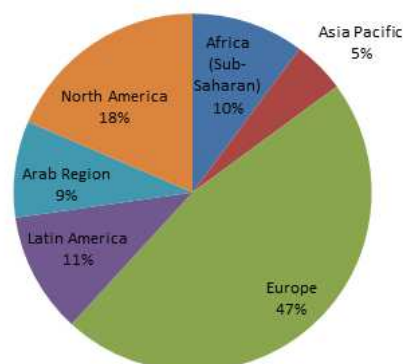


WINGSForum 2014 was comprised of delegates representing 43 countries and 135 organizations, spanning the globe with representation from all regions of the world. These participants represented an estimated 20,000+ foundations, grantmakers and social investors worldwide.

Demonstrating WINGS' continuing vigor, an instant poll held during the opening plenary showed that 76 per cent of those present were attending their first WINGSForum and over 56 per cent were under 45.

Predictably, given the Forum was held in Istanbul, the biggest percentage for overall conference attendance came from Europe (47 per cent), followed by North America (18 per cent), Latin America (11 per cent) and Sub-Saharan Africa (10 per cent).

Participants by Region



'It's my first time at WINGS, but I don't feel out of it, or a visitor, I feel so connected. Through the years in the sector I've met so many of my colleagues and they became friends and they're all here. It's all-embracing. I'm enjoying the relevance, the focus on what's really happening in the sector. It's giving us the space to think, to reflect.'

- Beulah Fredericks, Southern African Community Grant Makers Forum, South Africa

Purpose & Structure

Using the overarching theme *The Power of Networks: Building Connected Global Philanthropy*, WINGSForum 2014 sought to address the following goals:

- To **create a community** for more effective philanthropic contributions and collaborations via networking, edification, and open discussion,
- To **learn** new and innovative methods to address challenges, both on a domestic and international scale, and
- To **address** challenges facing the philanthropic sector by developing models for more effective philanthropic contribution

As usual, the Forum was divided between plenaries and smaller concurrent sessions. While this report covers all the plenaries, it does not include all concurrent sessions. Instead, it broadly follows the Networking & Collaboration and Knowledge & Skill Building tracks.

To address the goals of the conference, five tracks were created by which the program and concurrent workshop sessions were developed:

- Networking & Collaboration
- Knowledge & Skill Building
- Leadership & Trends
- Discussions from the Field
- Regional Highlights



WINGSForum 2014 also marked the launch of the WINGS report *Infrastructure in Focus: A Global Picture of Organizations Serving Philanthropy*. This report represents a starting point to build a comprehensive picture of the characteristics and development of global philanthropy infrastructure. It presents newly-gathered information and share funder perspectives on how infrastructure organizations help them do their mission-driven work better.

Dispersed between these plenary sessions, nineteen concurrent workshop sessions were offered which were categorized by the four main tracks of the conference. The concurrent sessions featured stories, case studies and practical tools, through roundtable discussions and interactive sessions. Additionally, three breakfast roundtables and one lunch roundtable were organized by delegates interested in expanding upon specific topics or participant segments, including:

- The Proliferation of Networks
- Community Foundations Discussion
- Support Organizations Discussion
- Executives of Philanthropic Organizations Discussion



Plenary Sessions

Thursday 27 March, 2014

Welcoming Ceremony

As Atallah Kuttub, Founder of SAANED for Philanthropy Advisory in the Arab Region and Chairman of the WINGS board, pointed out in his opening remarks, the size of this gathering was striking, as was its composition. He also noted two big changes in WINGS as an organization since the last Forum. First, WINGS is now incorporated, registered as a 501(c)(3) organization in the USA. Second, 70 of its 145 members are now dues-paying members – ‘and we’re working on the others’!

WINGS’ purpose is to provide a space for global perspectives, said Kuttub, and to build a strong global philanthropy community. He illustrated its role from the experience of SAANED, a philanthropy support association in the Arab region, which he founded. It was thanks to WINGS support, garnered through the 2006 Forum in Bangkok, and the global examples it furnished, and the sharing of successes – and, he stressed, of failures – that SAANED had come into existence.

Next to speak was Üstün Ergüder, chair of TUSEV, the Turkish Third Sector Organization, the Forum host. TUSEV is the ‘poor foundation of rich foundations’, said Ergüder: it doesn’t give money away, it promotes civil society. He spoke of the role that giving can play against the background of the economic crisis and how WINGS can be an inspirational platform, especially in a country like Turkey where it can help to promote both philanthropy and civil society.

Grantmaking, he argued, is more important to civil society than ever. Where the legal environment for both civil society and giving is deficient, where there is question about both the effectiveness and the probity of civil society organizations (CSOs), and where political turmoil is the order of the day (the ban on Twitter was still in force as he spoke), the pooling of ideas and exposure to new models are critical. WINGSForum was happening at a crucial moment in Turkey.

‘Productive and fun, open and live’

The need for global networks has never been clearer, said Barbara Ibrahim, Director of the John D. Gerhart Center for Philanthropy and Civic Engagement, American University in Cairo and chair of the WINGSForum Programme Committee. Since Como, global networks have come of age. The world has changed, too – think of the Arab Spring – and networks have played a part in that. She noted changes in philanthropy: organizations have moved from talking about collaboration to action. The sector and its beneficiaries are demanding more and clearer feedback, ‘real time information on what works’. She proudly stated, ‘WINGS time has come.’

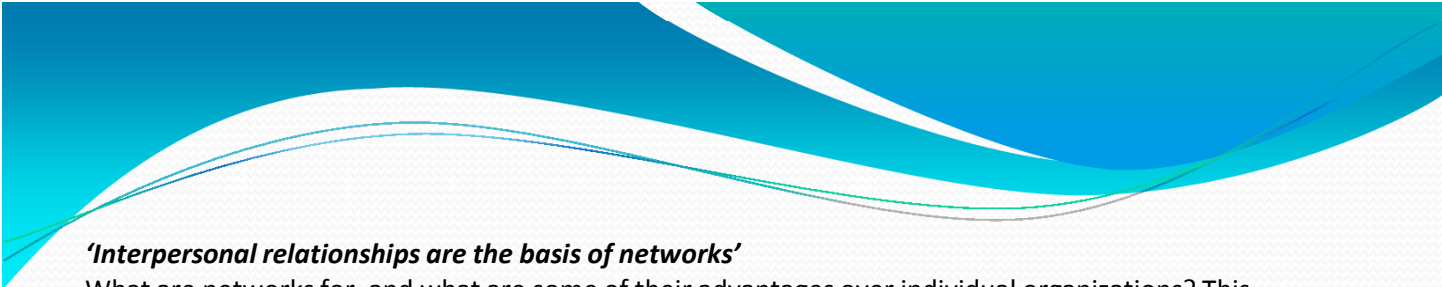
The Power of Networks

Danny Sriskandarajah, Director-General of CIVICUS: World Alliance for Citizen Participation, launched the first plenary, sketching out five major challenges for philanthropy.

First, the space for civil society is shrinking nearly everywhere, whether because of hostile governments or the reluctance of funders. How do we win the war, he asked, and not just the battles? Second, he saw the beginning of the end of the way international development has been financed for the last 50 years. How can we adapt and change? Third, the log frame has killed the radical idea. Risk-averse funders and over-formal reporting requirements are curtailing innovation among CSOs, he suggested. In future CIVICUS's Nelson Mandela award will include a category for 'brave philanthropy'. Fourth, how do we measure impact? And how do we make creative use of the mass of data now available? Finally, from a civil society point of view, philanthropy is a 'wonderful chaos'. How and when should philanthropic organizations collaborate?

He then framed an important and uncomfortable question. Given the advances in technological infrastructure, it has never been easier to form networks, but ultimately what good do they do? 'The power of networks needs to challenge networks of power,' he said. Networks are good at running networks, but they are bad at challenging the powerful.





'Interpersonal relationships are the basis of networks'

What are networks for, and what are some of their advantages over individual organizations? This question was posed by network guru Steve Waddell, Principal of NetworkingAction and the session's keynote speaker. They fulfil some human needs, he said. Organizations are important, but they are relatively closed entities. They set up barriers, whereas networks are open. They can promote efficiency by communicating and avoiding duplication. They bring flexibility of action; they work laterally rather than through hierarchies; they can tackle complex issues. They enable a diversity of approaches, bringing together different voices. Their reach allows them to address problems on a global scale. Finally, they bring speed of communication permitting 'viral dissemination' of ideas and information.

He cited some examples of networks in the philanthropy world: WINGS, the *Global Fund to Fight AIDS, Tuberculosis and Malaria*, Transparency International and RE-AMP, a group of US funders which is coordinating the response to global warming. All are very different in structure, he said. WINGS grew out of the trade association tradition, where like-minded organizations come together to work towards common goals; the Global Fund uses country coordinating mechanisms to administer its funds; TI is a federation of independent national chapters; while RE-AMP dispenses with a secretariat altogether. Aiming for coherence in effort, its staff are dispersed throughout key organizations within the network.

In Waddell's view, the key activities of philanthropy networks are creating a shared vision for the role of philanthropy in the world; system organizing, i.e., bringing different actors together and going in the same direction; learning from each other; measuring/certifying (is the field having an impact?); pooling resources for action; and advocating for a better environment for philanthropy. He also isolated eight attributes that, in his experience, produce a good network.

- **Leadership:** connecting, stewarding, reconciling differences diplomatically.
- **Capacity to develop:** from, say a hub-and-spoke model to a less centralized approach when necessary.
- **Measuring impact:** some metrics, he said, echoing Danny Sriskandarajah, can undermine networks. They have to get past the input-output model to approaches that are better tests of the vibrancy of a network. WINGS could play an important role in pioneering such tools.
- **Capacity to manage change, reform and transform.**
- **Ability to create robust 'glocal' (global/local) conversations.**
- **A learning strategy** which can move from gathering data to using it effectively, what he termed 'wisdom in action'.
- **Ability to connect action with policy.**
- **Attention to members' needs:** an association's members often want something specific from membership and the network must pay attention to that.

Bradford Smith of the Foundation Center noted that Waddell's four examples of networks have very different budgets. What effect does this have on their functioning? Budget is not a good index of success, said Waddell. The main issue is how effectively you leverage the resources of your members. In response to other questions about the use of social media as an indicator of success and the use of unstaffed networks, he stressed that there is no one answer. All types of network exist at the same time, depending on the needs they are meant to serve. There isn't a development model that moves from one stage to another.

Raising the Bar Higher: Infrastructure of Philanthropy: *Data, Accountability & Transparency*

Referring to infrastructure as ‘the electric current, the connective tissue’, Barbara Ibrahim, moderating, asked the audience what they see as the most critical elements of philanthropy infrastructure. Using hand-held voting devices, the audience came up with the following answers:

- Legally/fiscally enabling environment: 31%
- Sharing high quality data: 16%
- Promoting the visibility of the sector with information on outcomes of work: 53%

Interestingly, in response to two further questions, it emerged that almost 60 per cent of the audience *did* feel they were working in a supportive environment (which probably explains the response to the first question). Asked whether their member associations collect and share data about their foundation members, 34 per cent felt they collect ‘quite a lot’ and a further 54 per cent felt that they share at least some basic data.



According to panelist Filiz Bikmen, Chairman of the International Center for Not-for-Profit Law (ICNL), all three issues are important and interlinked. Greater publicity for the work of philanthropy can help combat the unfriendly attitude of some governments which see civil society as either a threat or a nuisance and can aid the creation of a legal regime in which giving (and receiving –there are often obstacles to receiving funds from outside the country) is not only tolerated but encouraged. New donors in growing economies, she said, need more space for philanthropy.

Portraying the sector

Data is needed to portray the sector, said Rosa Gallego Garcia, Manager of the Association of Spanish Foundations (AFE) and of DAFNE, the association of European national associations. If you don’t collect data, how do you advocate on the sector’s behalf? This is the challenge AFE faces. Spanish foundations publish basic data in their annual reports but there are no fewer than 50 supervising authorities for the sector (most of the audience felt that there were only a handful of such authorities in their country, if any) who keep data but don’t use it. AFE tries to offset this by collecting data from foundations and from the supervising authorities and publishing an online directory, attempting to move from ‘a no-data landscape to cannibalistic activity’. On the European level, she believed, what is needed is a common basis for using data between WINGS, the EFC and DAFNE.

‘We always look forward to WINGSForum because it’s the gathering where we meet those who are in positions similar to ours, and we hardly see ourselves in that position in our countries. WINGS is the main source of broader analysis on trends and challenges for the philanthropic sector as a whole, globally.’
- Andre Degenszajn, Grupo de Institutos, Fundações e Empresas (GIFE), Brazil

From cannibals to vampires

Panelist Bradford Smith, President of The Foundation Center, expanded on the need for data. Vampires, he said, leave no image in a mirror. 'If you don't have data, you can't be seen and you can't see yourself.' Even in the US, where the environment is relatively favourable, the available data is not in a particularly accessible form. Nor does it guarantee transparency. Ninety-three per cent of US foundations don't have a website, he told the audience, including 30 per cent of US foundations with assets of over \$100 million.

He told the story of how the Foundation Center was born out of McCarthyism. In hearings in the early 1950s, US foundations were accused of supporting Communist activities. This led to the creation of the Foundation Center, because the foundation sector needed public information about what it did. This meant hand-copying 7,000 sets of documents!

However, online technology will transform data, he said. In the next five years, the tax returns of all foundations will be digitized, open and searchable. In a digital world, data and transparency are inextricably linked.



Why the resistance to sharing data?

Why are foundations so averse to sharing data, he wondered? There are two often-cited obstacles. One is that the sector is too diverse and the second is that data is too sensitive to share. This was instantly polled. Barbara Ibrahim asked the audience how much of the work of foundations in their country the audience felt was too sensitive to share. The results were illuminating: almost 46 per cent felt that none of it was, and another 39 per cent felt that only a small proportion was.



In a counter to this, Jo Andrews of Ariadne argued that data is a double-edged sword and can be used by, among others, unfriendly states. You have to be conscious about data trails and foundations often aren't, she said. Bikmen replied that the state of Turkey already knows all there is to know about foundations. It is the public that Turkish foundations are worried about, not the government. Ibrahim said that Smith had converted her to the sharing of data. When foundations in Egypt have been prosecuted, it wasn't on the basis of the documents they produce.

In response to questions, the three panelists spoke of the need for a global taxonomy on data. Sharing data is necessary but can be problematic. It is a matter of trust, said Gallego, while Smith noted that foundations' willingness to share data will depend on what they get in return. Bikmen believed that foundations do want to share *some* information: what they don't want to do is to talk about failures. Another problem for data-gathering agencies is that you can't make a business out of selling data, it's too cheap. The value lies in analysis and the more data there is, the more important analysis becomes. That, argued Smith, is the future.

Finally, in response to a question about funding infrastructure in emerging economies, Bikmen identified the need for indigenous foundations and for the sharing of data through networks. Gallego noted the slender resources for philanthropic infrastructure. The dictum that all the money should go to the beneficiary is killing infrastructure, she said.

The Launch of: Infrastructure in Focus *A Global Picture of Organizations Serving Philanthropy*



Data and its uses also formed the theme of the next session, presented by Larry McGill, Vice President, Research of the Foundation Center and Barry Knight of CENTRIS in the UK – referred to by the Mott Foundation’s Shannon Lawder, chairing, as ‘Blarry’ and described by her as ‘a little bit fond of data’. Warren Buffett warned us to ‘beware of geeks bearing formulas’. However, this report was interesting even to like her who isn’t a data geek.

According to the research, WINGS members serve over 22,000 organizations. While all WINGS members run conferences and seminars, the service valued most highly by their members is training.

WINGS membership is still predominantly drawn from the US and Europe, though representation from Asia is increasing. Most members work nationally (78 per cent) while 28 per cent work internationally.

Reiterating a theme raised in the previous session, Knight remarked that the significance of the research lies in making infrastructure visible. Too often it is invisible and therefore less likely to attract support. On what basis should their work be assessed? Knight elaborated the four Cs:

- **Connection:** the building of relationships
- **Capability:** developing the necessary skills and knowledge
- **Capacity:** building resources and a culture of philanthropy
- **Credit:** reputation and recognition

This research is a beginning, he stressed. The next steps are to secure better data from some members. An evaluation framework for support organizations needs to be co-created by those organizations and a common strategy devised. The language philanthropy support organizations use is ‘obscure and alienating’, he said. Data can be used to tell stories that aren’t being told, and telling those stories would strengthen the field and encourage funders.



“It was a very good chance for networking, meeting people from different parts of the world, looking at all the challenges and seeing how foundations are finding a way around them. The Forum has allowed me to think about different methods of partnership and collaboration. It also underlines the importance of infrastructure ... without strong infrastructure, we cannot strengthen civil society.’

- Sevda Kılıçalp, Third Sector Foundation of Turkey (TUSEV), Turkey

In Conversation with TUSEV: Adapting to Change: Turkish Foundations Moving into the 21st Century

Turkey has a long history of philanthropy, which has generally expressed itself in the provision of welfare and the building of infrastructure to underpin it, such as hospitals and schools. Grantmaking is a relatively recent development and has by no means been embraced by all Turkish foundations, explained Sevda Kılıçalp of TUSEV, who chaired this last plenary of the day. She then introduced three panellists from Turkish foundations that have all moved from operating to grantmaking in some degree.

Sabancı Foundation



Sabancı Foundation has been making grants only since 2006, said Rana Kotan. They appraised their activities and compared themselves with a number of international foundations; at the same time, they consulted with representatives from the NGO sector, government and academia. This led to the launch of their first grants programme. This, she said, began their process of transformation from a family foundation into a strategic organization. Their focus is on women, young people and the disabled, the most marginalized groups in Turkey.

Anadolu Foundation



Founded in 1979, the Anadolu Foundation has plotted a similar course, said Selim Güven. Around the turn of the 20th century, the number of universities in Turkey was growing but their quality was indifferent. In partnership with companies, it attempted to 'redefine' Turkish higher education and broaden the curriculum. This led to attempts to promote a giving culture in Turkey through alumni associations formed from the recipients of Anadolu scholarships. The foundation is particularly keen to reach young people in isolated rural areas in order to bring them into contact with the wider world, said Güven. For its part, the foundation has felt the influence of European organizations through its membership of the EFC and the EVPA. It has also developed an interest in social enterprise and is translating and publishing material on this topic.

'The thing that I've loved most is the people here. It's a remarkable gathering of individuals. It's awesome to be in a space with that much collective knowledge and experience, and that's something WINGS enables. From the perspective of the participant experience, I think WINGS has hit a home run.'

- John Harvey, Philanthropy Advisor, United States

Aydın Doğan Foundation



According to Candan Fetvacı, the Aydın Doğan Foundation has found that, if you support physical infrastructure projects, you have to retrace your steps every year in order to refurbish the plumbing or the roof or some element of the building's fabric. So Doğan turned its attention to human resources. It launched an organic farming project in a rural area in order to create new livelihoods. Other funders became involved and the programme has grown through their support, to the point where it has achieved a tenfold increase in incomes in the area. Doğan, like the Sabancı Foundation, is concentrating on young people to impart the habits of organization and initiative so that they will be encouraged to take on bigger projects.

Given the examples of these three foundations, is grantmaking likely to grow in Turkey, asked one audience member? One of the things needed if this is to happen, said Kılıçalp, is for grantmakers to measure and communicate their impact to afford examples of what grantmaking can achieve. It will take time, agreed Kotan. The culture of Turkey needs to change and the country needs political stability. However, with new wealth, new donors are emerging, which is encouraging. Güven summed up what seemed to be the general sentiment among the panel: he is convinced it will come, but it will take time and trust.



The Olga Alexeeva Memorial Award Ceremony: *Honouring Emerging Philanthropists in Emerging Societies*

'If I was giving a presentation,' recalled Barry Gaberman, Independent Philanthropy Professional, of Olga Alexeeva, 'I hated to see her hand go up because I knew she was going to ask a really tough question.' Announcing the winner of this year's Olga Alexeeva Memorial Prize, Gaberman remarked that she had always had the courage to speak truth to power and had never compromised her own integrity.



There were 19 nominations for this year's prize, said Maria Chertok, Director of Charities Aid Foundation and one of the Prize's organizing committee of three. The shortlisting had been difficult. Those finally chosen came from around the world and represented between them many emerging economies. Moreover, they were involved in very different kinds of activities. What they had in common was that they came from countries where philanthropy, in the modern sense, at least, was just developing.

Jenny Hodgson, Executive Director of Global Fund for Community Foundations and another of the prize organizers, reiterated the difficulties of the choice. The work of the finalists was of a consistently high quality and any one of them could have won it, she said. While their activities are very different, they are all inspiring and exciting.

Hodgson announced the shortlisted candidates:

- Larisa Avrorina, Charities Aid Foundation, Russia
- He Daofeng, China Foundation Center, China
- Lucia Delagnello, Instituto Comunitario Grande Florianopolis (Icom), Brazil
- Rūta Dimanta, Foundation Ziedot, Latvia
- Itir Erhart and Renay Onur, Adim Adim (Step by Step), Turkey
- Natalya Kaminarskaya, Russian Donors Forum, Russia
- Dhaval Udani, GiveIndia, India



'WINGS reminded me – once again – of the range of national environments for philanthropy, at the same time as highlighting our common ground and shared challenges. Learning from colleagues around the globe has certainly given me ideas to apply to our funding programmes in the future and a host of new contacts to inform our thinking.'

- David Sampson, Baring Foundation, United Kingdom

Finally, Barry Gaberman announced He Daofeng as the winner. In conversation with Caroline Hartnell of *Alliance* magazine, upon receiving the prize, He remarked on three main obstacles to the development of philanthropy in China: self-interest among many Chinese, encouraged by the market economy; the legacy of the Cultural Revolution and its insistence on invading all private space; and the corruption among GONGOs, government-sponsored NGOs.



He himself had presided over China's first panels on transition of a GONGO into a fully independent organization in the shape of the CFPA. It had been a difficult and solitary process. He had made enemies and had felt isolated, even threatened. However, he said, the country is seeing a growth in civic participation among the rising generation and social change is coming in the next five years, he predicted.

What is needed to encourage philanthropy in China?, Hartnell asked. The focus should be on encouraging companies and wealthy individuals to give, he said. In terms of reforming the legal environment for the sector, central and local governments have different roles. The question for him, given the customary infighting in Chinese politics, is will they cooperate and how?

Finally, Hartnell asked him what he planned to do with the £5,000 which comes with the prize. 'I'm just a common person,' he said with great simplicity. 'I think I do something not as good as the prize committee admires. The prize is not for me. I want to give it to help hungry children and report it to your committee.'





Plenary Sessions

Friday 28 March, 2014

Current Debates: Grantmaking as a Tool for Development

The second day began with a ‘fishbowl’-style debate hosted by Jenny Hodgson, Executive Director of the Global Fund for Community Foundations. For those not familiar with the format, the stage is set with chairs for the panelists and empty chairs for anyone else in the room who wants to join the conversation. As it turned out, so many audience members wanted to speak that they carried extra additional chairs on to the stage – a testament to the success of the session and the format!

Grantmaking is increasingly coming under scrutiny, said Hodgson. ‘Grantmaking’ is not the most beautiful word, maybe a bit transactional- but is it a good tool? At last year’s African Grantmakers Network conference, Graca Machel questioned the use of the term grantmakers: surely we do more than give out money? In the US, affinity groups are beginning to remove the word from their names.

This is problematic for countries where philanthropy is emerging, said Andre Degenszajn of GIFE in Brazil. There, grantmaking is barely established, yet it is being talked of as though it were antiquated, he said. The funding landscape in Brazil is changing. Overseas funding, which has funded the civil society boom of the last 15-20 years, is being withdrawn. The local private sector is now the main potential source of funds, but most corporate foundations operate their own programmes. Companies feel they know how to address issues themselves, so why support NGOs? This is partly because they lack trust in the capacity of NGOs; partly because directly funding service provision is a safer bet, allowing them to show quick results; and partly because grantmaking is seen as the least strategic approach to achieving social change, often seen as ‘just writing a cheque’. The result is that the financial stability of the civil society sector is in question. Don’t focus on service provision at the expense of advocacy and political engagement, Degenszajn warned. That has happened in Brazil and he believes they are now paying the price.

Grantmaking was and is an absolutely essential tool, believes Heather Grady, an Independent Philanthropy Professional from the US. Her background is in grantmaking, most recently with the Rockefeller Foundation, and she sees it as indispensable to fostering change and to building civil society. She doesn’t see the distinction between traditional, strategic and catalytic philanthropy as clear-cut. Grantmaking can be catalytic, she insisted. She recalled that an unknown Albert Einstein had come to Rockefeller and asked for \$500. John D. Rockefeller had said: ‘I think this fellow’s on to something. Let’s give him \$1,000.’ The moral is that you must fund leaders. Apparently 60 per cent of US grantmakers don’t accept unsolicited proposals. ‘I’m lobbying for WINGS to keep grantmaking in its name,’ she said.

‘I’m here with all my members but one. We’re enjoying this for many reasons, mainly networking with people and organizations we don’t see so often in Brazil. It’s also good to see where the themes in philanthropy are moving, what the discussions are, what is included in this universe of philanthropy internationally – and to situate within that where our network is going. And we’re fine where we are, I think.’

- Cindy Lessa, Network of Independent Funds for Social Justice, Brazil

Kurt Peleman, CEO of the European Venture Philanthropy Association (EVPA) agreed that grantmaking is an essential tool. 'We don't want to hype VP and set up a dichotomy,' he said. 'VP comes into its own when we need to build strong organizations, and this is where business practices come in.'

Meanwhile, others were queuing up to take their places on the stage and put their views. 'Grantmaking!' Avila Kilmurray from Community Foundation Northern Ireland (CFNI) ringingly asserted. 'If we neglect it, we effectively deny the knowledge and experience of grantees. We're saying we have all the answers', she said, 'and we don't.' On the subject of venture philanthropy, she reported how at CFNI she had been approached by a VP funder who had insisted as the price of support that CFNI change its board. But CFNI's board was deliberately chosen to be half-Catholic, half-Protestant, crucial to the work it was doing in a divided society. VP is new, said Kurt Peleman in response. 'We make mistakes,' he admitted, but those involved sincerely want to improve society.



Why start with the approach, asked John Harvey from the US. Surely it's best first to decide what you want to do, then find the right tool for the job, not the other way round. In other words, you should make grants or run programmes or make impact investments as the need arises, rather than calling yourself a grantmaker or an impact investor. For him, there is too much focus on grantees as contractors. We should think more strategically as grantmakers about how we use our slim resources.

Heather Grady noted the pressure to make big grants because small grants cost proportionally more, but this often excludes smaller organizations. Regranting organizations who *can* administer small grants are therefore essential, but they too are under pressure to make successful grants or lose their funding.

There was a general feeling that grantmaking is a necessary tool in the philanthropic toolbox, indispensable for encouraging innovation and supporting small organizations operating on slender margins in places where there are often few other resources. But defense of grantmaking should not lead to neglect of other approaches, nor should it, as Barry Knight said, distract attention from the fact that the grantmaking community needs to raise its game.

Other voices pleaded for the space for a multiplicity of approaches. If you call yourself a grantmaker, warned Gerry Salole, Chief Executive of the European Foundation Centre (EFC), you're giving priority to one tool when you're using many. He emphasized the role of associations in helping foundations to raise their game. 'We need to move away from stupid grantmaking and stupid VP.'

The key for Stephen Pittam of the Working Group on Philanthropy for Social Justice and Peace, is to strengthen civil society, an often-repeated plea throughout the Forum. Democracies, he said, need civil societies and funders need to be responsive to their needs. Very few foundations launch social change initiatives, he observed, but they can support the organizations that do. In similar vein, another participant remarked that the crucial thing is to ensure the presence of rights-based thinkers and activists in the funding fold.

As Peleman stated, and participants agreed, 'we use different words, that's why we think we disagree.'

New & Emerging Trends in Philanthropy: *Exploring the Toolkit* Presented by Charities Aid Foundation

Jane Wales, President and Founder of the Global Philanthropy Forum, opened this session by noting a few recent trends in philanthropy:

- High net worth philanthropy is growing – and its getting younger.
- Inequality is an increasing problem and a significant threat.
- Traditional boundaries have gone: multi-disciplinary, multi-sectoral approaches are the order of the day, and the boundaries between the social and private sectors are blurring.
- Innovation is coming from unexpected places.



Chid Liberty



Wales then introduced Chid Liberty, founder of Liberty and Justice, the first fair trade social enterprise in Liberia, which trains women to work in the garment industry and which now employs 300 women. Following the end of the civil war in Liberia, he said, unemployment was running at around 80 per cent. There was an urgent need for investment to create jobs, but traditional investors wouldn't take the risk. Foundations were the first to invest in Liberty and Justice, and their funding brought in others.

Subsequently, it has been able to attract market-rate investment. But, he stressed, this wouldn't have happened without foundation money to start the process. He mentioned one unintended side-effect: between 25 and 30 per cent of the women working in the factory had subsequently got divorced. Many of these had been married either as children or very young; with a new sense of affirmation from their work, they were reclaiming their identity.

Lucia Dellagnelo

Philanthropy has changed, believes Lucia Dellagnelo, of Brazil's Greater Florianopolis Community Foundation (ICOM). It is a way of making your mark, no matter what approach you take. When ICOM began, there were no donors in Brazil and they needed to engage people in community issues. This often meant doing things community foundations don't usually do, like building houses.





ICOM is particularly interested in how young people want to use technology to solve social problems, and has set up an innovation laboratory called Social Good Brazil to encourage them. In five days 5,000 young people had registered. Young people need to develop their own theory of change and their own forms of empathy, said Dellagnelo. There is a big appetite for using technology to solve social problems, and we need to harness that. It won't be done through grantmaking. We need

to change the language and create spaces to encourage new thinking, new contacts and new relationships; we need, as she phrased it, 'to bring different tribes together'.

Crystal Hayling from the Lien Centre in Singapore wondered what happened if the young people involved didn't know enough about the social problems they were trying to tackle, but thought they did. It was precisely to counteract this that the lab was set up, replied Dellagnelo. They insist on participants doing a three-month workshop to develop their idea. Only five or six from the first intake were feasible. Another safeguard is that ICOM always partners the young person with a small local organization.



Shelagh Gastrow from Inyathelo in South Africa objected that there are a lot of social innovators from outside the continent who 'play' with Africa and then turn their attention elsewhere when solutions don't fall rapidly into place. She pointed to the need for ideas to come from 'Lagos or Johannesburg'. The good news, Wales responded, is that indigenous philanthropy is growing and that the balance of power in knowledge transfer is changing thanks to technology and to platforms like WINGS. In general, she noted, the ideas that will stick are those that come from the communities concerned.

"The topics that have been covered are really relevant to my areas of work. When I go back to my foundation in Africa, I will be able to look at its work holistically in the context of the way the world is now. I particularly enjoyed the session on the implementing of a university programme on philanthropy. I think it is well timed. It is something that should have come a long time ago and we should have a course in our universities to deal with philanthropy.'

- Anthony Igecha, KenGen Foundation, Kenya

The Barry Gaberman Lecture: *The Role of Philanthropy in Difficult Times*

Presented by Dr. Avila Kilmurray, Director, Community Foundation for Northern Ireland



‘It was the best of times, and it was the worst of times.’ Avila Kilmurray started the Barry Gaberman Lecture with this quote from Charles Dickens’ *A Tale of Two Cities* – one of many quotes she came up with during the lecture. Her brief was to look at the role of philanthropy in difficult times, but her optimistic subtext would be: why miss the opportunities in a good crisis?

The challenges facing the world certainly seem to justify the view that we live in the worst of times, she said, citing the seven challenges identified by the Elders:

- Growing inequality (this issue is ‘a bit ticklish’ for philanthropy, she said, given the emphasis on giving by the ultra wealthy).
- The prolonged global economic crisis, shifting attention from international relations to domestic issues and fomenting nationalism and xenophobia in its wake.
- Disillusion with political leadership (the Aga Khan, she said, had castigated governments for being inadequate to their task).
- A failure of governance at all levels, leaving fertile ground for corruption and transnational crime, such as human trafficking, drug dealing and the illicit arms trade.
- Growing threats to human rights.
- Armed conflict, often long running and almost forgotten.
- The failure to deal with climate change.

She also identified three positive trends: increasing civic activism, wider recognition for universal human values, and the digital revolution and the opportunities it offers for information and communication.

What is the role of philanthropy in this ever-changing world? Philanthro-philosopher Michael Edwards emphasizes the need for an ecosystem of different funding styles. Integrity, courage, compassion, equality and perseverance are values identified by the Elders – ‘All values that stand at odds with those examples of well-endowed foundations that in practice prefer courtiers to critical thinkers’. But they do need to be deconstructed if we are to apply them in our daily work.

‘I come here and look at the list of participants and this is a complete picture. These are those who are working in the space to support the space, to support the infrastructure, support the advocacy in the policy dimensions of it. The convening itself is very good, as well as any research that can be done within the membership and beyond. And that linking of who’s doing what to make sure there’s no duplication, I think, is extremely important. It’s a very worthwhile venture, and there’s going to be an incredible amount of movement in this space in the coming years.’

- David Schwartz, International Development Research Centre, Canada

Kilmurray then went on to list the ten 'commandments' enumerated by Barry Gaberman when speaking at the US Council on Foundations some years ago. 'In terms of the potential of philanthropy I think we need go no further.'

- Take risks
- Tackle sensitive issues
- Support activities that are not sustainable without subsidy
- Sustain services for deprived groups that are not the priority of government
- Think long-term
- Be flexible and be willing to make course corrections
- Act rapidly ('well, sometimes')
- Test new initiatives
- Fund policy analysis and criticism
- Fund advocacy

All of these things, she said, will be necessary in difficult times.



Community philanthropy in global development

What about community philanthropy? Kilmurray went on to sketch out the role that community philanthropy organizations can play in global development. They can be the antennae of the philanthropy world, she said, 'the source of social capital that can bridge the global and the local contexts'. 'It is at the level of more locally based community philanthropy that we can gather the evidence that is essential for horizon scanning in a global context in order to establish (a) what factors are constant; (b) what is changing; and (c) what are the consistent changes that we are picking up – those straws in the wind – that are particularly important.' These organizations are already working, for example, in the megacities and know the challenges involved in civic activism. They should know of the impact of inequality and migration and xenophobia in their communities; they can address challenges that are emerging.

'Grounded information from community philanthropy could be mobilized to inform higher level aspirations and policies.' In order for such groups to fulfil their potential, we need more creative and forward-looking partnerships that will open a channel of communication and expertise between the international and the local. This is the underplayed potential of community philanthropy in addressing global challenges, she said.

One objective of the recently established Global Alliance for Community Philanthropy, which Kilmurray will head up, is to draw on learning in community philanthropy to complement the work of others. Community philanthropy needs to be supported to enable it to contribute not just to surviving difficult times but to shaping the future. In this way it can demonstrate that it can be far more powerful than acting as an ATM cash machine.

When it came to questions, Barry Gaberman noted the difficulty of living up to the 'ten commandments'. Kilmurray responded that philanthropy could draw inspiration from what it had done in the past, in supporting human rights or the women's movement. The challenges ahead look daunting, but philanthropy, whether foundations or associations, isn't tackling them whole or alone; it is starting chain reactions.

WINGS IMAGine Recognition Ceremony

Honoring the Charles Stewart Mott Foundation

Next, Atallah Kuttub presented the WINGS IMAGine Award to the Charles Stewart Mott Foundation. It's difficult to fundraise for philanthropy infrastructure, he said. It's like the plumbing in a house – as long as it's not leaking, nobody thinks about it. It needs resilience, persistence, commitment and faith in the future to keep funding infrastructure; WINGS was honouring the Charles Stewart Mott Foundation for displaying precisely those qualities.

Shannon Lawder, Program Director - Civil Society for the Mott Foundation, accepted the award, and wondered: 'If infrastructure is the plumbing, what does that make us?' More seriously, she paid tribute to Mott's president, Bill White, who had displayed long-term vision and support for WINGS, to other funders, past and present, and to the staff and board of WINGS.



The Launching of: UBS Global Philanthropy Compass Panel

Presented by UBS

In the final session of the day, Silvia Bastante de Unverhau, Head of Philanthropy Advisory at UBS, introduced the UBS Global Philanthropy Compass, a primer for philanthropists which, she said, sets out the key questions involved in engaging in philanthropy and takes the donor through them in logical sequence.

- How to create change
- How to plan and implement your philanthropy
- How to involve others, such as family members or personal networks



It is, she said, the result of UBS's ten years' experience of philanthropy advice. The decision to share it more widely demonstrated the bank's commitment to the sector. Maria Chertok, Director of Charities Aid Foundation, and chair of the session, declared herself impressed with the Compass. It's not prescriptive, she said, and lays out a wide range of choices.

Several of those present had already seen and used the Compass, among them Paula Johnson, formerly of the Philanthropic Initiative (TPI), also a panellist for the session. She described the Compass as 'one of the best tools I've seen' and said that it was in the tradition of TPI's motto of serving 'those who want to dream big but act wisely'. Bastante stressed that it is a tool to be shared freely. In the same spirit, UBS is keen to broker introductions between clients and philanthropy organizations as and when appropriate.

There were questions about the role of bankers as philanthropy advisers. How do they have legitimacy to advise on giving, it was asked. Banks are having real success in increasing the pool of philanthropic capital, said Johnson. 'We as infrastructure organizations should be seeking links with private banks as they increasingly influence the spending of wealth,' said Chertok.

The launch was followed by a cocktail reception hosted by UBS.



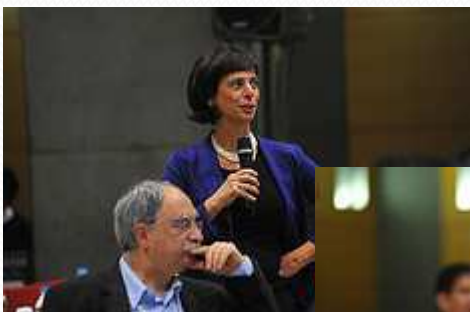
Plenary Sessions

Saturday 29 March, 2014

Shaping Our Future: A Consultation with WINGS Members

Before general proceedings began on the last morning of the conference, there was a closed meeting for WINGS members. The main points to come out of this included:

- Sharing of information among members (one suggestion was for twice-yearly updates) and cultivation of links with other global bodies continues to be an important function of WINGS. Other specific suggestions included a series of webinars to keep members in touch with developments around the world, and dissemination of the substance of a recent bill in Brazil on endowments, which could prove useful to members in other regions.
- In addition to sharing information, is there potential for pooling resources and co-investment by members in instruments that could be used in common? An example given was the joint creation of a technology platform that could be used by members.
- Corporate giving is an important element of philanthropy in many members' regions, and often volunteering is central to such giving, but so far little attention has been paid to it by WINGS.
- In many countries there are greater threats to the legal and regulatory space for philanthropy than previously. The creation or preservation of an enabling environment for philanthropy should form part of WINGS' agenda in the immediate future.



Associations on Trial



The first session of the final morning took the form of a trial of philanthropy associations in which they stood accused of ***'failing to adequately serve the philanthropy sector and lacking vision, creativity and collaborative spirit in pursuit of their goal'***. This was not the first such trial to be held at a philanthropy conference. At the EFC conference in 2008 foundations stood accused by prosecutor Diana Leat of 'caring for their own and holding lovely family reunions (like this EFC AGA) while the situation in the real world gets worse in every dimension'. Three years later, at the Council on Foundations

2011 conference, Gara LaMarche, then president of Atlantic Philanthropies, accused foundations, among other things, of failing to speak effectively on behalf of the most marginalized.

For this year's trial, and fully entering into the spirit of the proceedings, were the following:

- **Christopher Harris**, for the prosecution (in another life, a member of the Working Group on Philanthropy for Social Justice and Peace)
- **David Cutler**, Director of the UK's Baring Foundation, defending
- **Halima Mahomed**, also of the Working Group, the judge
- **Nalia Farouky**, Executive Director of the Arab Foundations Forum, as jury foreman

And since this was a trial with a difference, the audience would have a chance to cast its vote, too.

'They have failed with devastating effect'

How can we test guilt or innocence, asked Christopher Harris, elaborately costumed but rejecting the use of the wig as a relic of a British colonial past (as did Mahomed and, inexplicably, Cutler, who has a representative of the colonial nation should surely have felt comfortable thus attired?). He proposed that we take associations at their own word. He had looked at the mission statements of a sample of associations. While most contained the expected aims to support the legal and regulatory environment; the convening and networking of foundations, etc., WINGS mission also includes advancing global philanthropy, while CoF and EFC make claims about furthering the public good. GIFE and TUSEV make similarly ambitious claims. Associations should be applauded for taking on such noble responsibilities, he said. But do they help advance the public good and more just and equitable societies around the world? We can't hold them responsible for Ukraine and Syria, but what about longstanding injustices? How well have associations delivered?



He focused on three longstanding issues – growing inequality and the concentration of wealth in a few hands; the crisis in the Democratic Republic of Congo; and access to firearms in the US. There is not one example of an association that has helped its members to deal with any of these issues, he accused. They have failed, he said, ‘with devastating effect’ to live up to their missions.

‘They sometimes stop in unexpected places, but they get you there in the end’

In response, David Cutler castigated the prosecution’s ‘underhand’ tactic of ‘taking you at your own words’. He pointed out that the charge against foundations was not failing to cure the ills of the world but failing to serve their community.

Here, he said, they have succeeded. Trade associations are seldom loved by their members, he noted, but philanthropy associations have succeeded in bringing together a group of independent and individualistic foundations. On points of detail, he insisted, the African Grantmakers Network *would* have a response to the situation in DRC and a view on how to help its members to deal with it, while in the UK, the Association of Charitable Foundations (ACF) was actively campaigning against a bill that would reduce the voice of civil society. In Europe, the EFC had been leading on the creation of a European Foundation Statute over the last few years.



Cutler concluded the opening defence with an inspired comparison between associations and the lifts in the conference hotel: ‘You need patience. They sometimes stop in unexpected places, but they get you there in the end and you meet some nice people on the way.’

Views from the floor

Jenny Hodgson of Global Fund for Community Foundations remarked that she had been in DRC three times in the last year, working with TrustAfrica and the EFC on a local initiative, and that platforms like WINGS are needed to start such initiatives. Carole Mack of ACF reiterated the defence’s stance that associations are not set up to intervene directly in global questions but to assist their members to do so. But Stephen Pittam, founding member of ACF, challenged the defence: don’t associations have a duty to raise issues and to lead on difficult problems?

Barry Gaberman wondered from the floor about the credentials of both counsels: neither had shown any knowledge of the field, he claimed. When had there been any mention of a theory of change, or of the logic model of catalytic philanthropy? Sheer ignorance! The case should be thrown out, he argued.

The two verdicts

Interestingly, though the jury returned a unanimous verdict of not guilty – on the grounds that it is not associations’ role to drive policy but to serve as platforms for dialogue – the audience vote was fairly even split. The key issue here is whether associations should take a lead on the big issues facing the world and how foundations can respond to them – an issue that surfaced in the interview with the WINGS chairs, past and present.

In Conversation with Ian Bird & Vikki Spruill

Moving Toward an Engaged Network Approach



In the second plenary of the morning, South African philanthropy consultant Tina Thiar prompted Ian Bird of Community Foundations of Canada and Vikki Spruill of the US Council on Foundations to discuss their views on networks.

Not just about infrastructure

Place matters to a network, said Bird. There is no one approach. He noted that he had never given a grant or made an impact investment. His work is linking up organizations so that what they become together is more than the sum of their

parts. The biggest benefit of involvement in a network, in his view, is the sense of leadership and the feeling of being part of something bigger. With an echo of Avila Kilmurray, he spoke of redeploying the sense of possibility created by the network into the local work of community foundations. Networks are not only about drawing out assets, not just about infrastructure; they can also inspire.

Canadian community foundations have 20 years of experience of working together. In order to extend their influence, he is reaching out to other sectors – to government, the media, academia and business. One of the biggest challenges is the issue of credibility. CFC is beginning to take on more ambitious questions such as the problems confronting young people. What are the credentials of community foundations for confronting such challenges? He urged networks and their members not to be inhibited by this. Community foundations have a long history of tackling most problems at local level and a long tradition of independent work to build on.



'As a newcomer to WINGS, there were lots of insights that I can take back to my work in Italy. I really appreciated the different methodologies used to present this information – from the plenary sessions to concurrent workshops and networking opportunities. The fishbowl debate was the highlight for me.'

- Carola Carazzone, Associazione Italiana Fondazioni e Enti di Erogazi (ASSIFERO), Italy



More a network than an organization

A network is about building a community and increasing knowledge, said Vikki Spruill. For CoF, the network is a tool, not an outcome. Based on a consultation with members, she had seen the need for CoF to become more like a network than an organization in order to keep pace with the times and serve its membership better. For her, the watchwords were: trust, not control; humility, not brand; mission over institutional form; and node, not hub.

There is a tension within CoF, she said, over the question of whether it is a membership association or a leadership association. The biggest source of resistance, she noted, has been CoF's internal culture. The Council, she believes, needs to look outward not just inward, and to do so, it needs to be more like a network. It has now begun partnering more with external organizations like the Center for Disaster Philanthropy. This partnership allows it to mobilize members more quickly in response to disasters. It is also in the process of creating a national platform for youth philanthropy; it is convening a summit on this in June.

'We never have all the answers'

Finally, Tina Thiant asked the two to identify the most important lessons they had to pass on. Focus on the goals of the network, said Spruill, not on how it works or what it looks like. She also urged the need for trust and humility. We never have all the answers, she said, and we have to be prepared to let our guard down a bit on occasions.

Look for the early leaders and promoters of ideas, said Bird, and don't waste time trying to convert the resisters. He mentioned CFC's Vital Signs project, which in a sense acts as both compass and yardstick. He also urged the need, endorsed by Spruill, to assess the effectiveness of the network approach by listening to 'what others say about us'.

Closing Ceremony

Framing a Future We'd All Like to See

In closing the Forum, Barbara Ibrahim recapitulated some of its major themes and preoccupations:

- The shrinking space for civil society; grantmaking is needed to help foster ideas.
- The growing availability and subtlety of data and how to turn it into 'wisdom in action'.
- The inequality of relationships based on power: they exist, they colour what we do and we have to acknowledge them honestly.
- The blurring boundaries between disciplines and sectors.

Finally she quoted two of Avila's Kilmurray's sayings from her lecture: first, that 'we shouldn't miss the opportunities of a good crisis'. Second, that 'the future has a tendency to arrive before we are ready for it'. WINGS frames a future we'd all like to see, acknowledging and dealing with differences, showing a willingness to take the extra step. We should all take that spirit on, she urged.

The Forum closed with Basak Ersen of TUSEV thanking the participants for bringing their 'expertise, enthusiasm and joy' to Istanbul, and Jorge Villalobos of Cemefi issuing a general invitation to the next WINGSForum in Mexico in 2017.



'It's an amazing and unique gathering. As an association of associations, or a federation, there's no other place on the planet where I can come and learn from my peers. One takeaway I have found is the commonality of needs around the world, despite all the differences and the cultures and stages of economic development. As associations, we all have common challenges and I think that now we're going to try to collaborate a lot more.'

- Michael Litz, *Forum of Regional Associations of Grantmakers, United States*

Concurrent Workshops

Thursday, 27 March: Session #1

The Global Data Charter – Because Data is Worth It

Presented by WINGS

Track: Knowledge & Skill Building

‘Not a document, but a development process’

Building on a key theme of the morning plenaries, this session introduced WINGS’ work in elaborating what it calls the Global Philanthropy Data Charter – a set of principles and a framework to improve the use of data. This first version of the Charter, said Ana Pinho of WINGS, came out of a meeting in Rio de Janeiro and three webinars involving between 60 and 70 people. The findings of this were consolidated in a second meeting and will be reviewed next year. It was, stressed Barry Knight, one of the panellists, ‘not a document, but a development process’.



Fellow presenter Patrick Collins outlined the difficulties involved. First, when it comes to something new, he observed, everyone wants someone else to go first. The Charter could help by collecting and publicizing successes. Second, and related to this, follow-up is difficult. It needs public commitment from a few foundations to make it work. That’s why the Data Charter is signed: it involves a symbolic commitment which is more likely to be binding than a verbal

indication of intent. Third, foundations seldom have the expertise to act on the precepts of the Charter so they need outside resources. That is where associations as a central and coordinating resource come in. The Charter will both persuade associations to do this and give them a means to do it. Finally, there is the familiar question of funding. People, said Collins, want data to be free, but free data is often not useful. Its cleaning and management can be dear.

In the Middle East and the Arab region, said Heba Abou Shnief of the Gerhart Center for Philanthropy, philanthropy is being transformed, with new forms of giving developing alongside more traditional, but also changing, forms. However, there is no comprehensive survey of giving, which affects its visibility and coordination. There are few infrastructure organizations, openness is lacking, and panelists about the value of data is common. The Charter will be useful in drawing lessons from other areas (enabling the region to ‘leapfrog’ one or more stages of development) and in advocating for the collection and sharing of data.

In response to questions about its use, the panelists stressed that the Charter is enabling, not prescriptive. It is meant to provide a common understanding of the different elements of philanthropic research. It can be tailored for different contexts. Rosa Gallego wondered about having some form of 'badge' of compliance that organizations could put on their website – and in fact such a step is planned.

What the Charter doesn't do at the moment is give guidance on putting data collection into practice. That is seen as the next level, to be informed by the experiences of those who are implementing it. Some of these were actually in the room.

One of them, Brad Smith, said the Charter has made the Foundation Center more sensitive about imposing data standards on others; he sees it as the start of building a global data system on philanthropy. Hans Fleisch of the Association of German Foundations (BDS), another early implementer, said that, despite the fact that BDS already has an extensive database, the Charter has been valuable in providing grounds for comparison with other national associations. Common principles, he argued, give rise to common questions. He suggested meetings of people who use the Charter to create conversations and pilots in different regions to sample the experience of using it in a wide spread of places.



There is still a long way to go, Collins emphasized. Most foundations don't even have specific roles for the collection, analysis and management of data, whereas in the private sector every company has a data group. We need to learn from this, to take tools from other sectors and adapt them.

Concurrent Workshops

Friday, 28 March: Session #2

100 Years from Cleveland: Mapping the Global Community Philanthropy Field
Presented by Global Fund for Community Foundations & WINGS
Track: Networking & Collaboration

The session title refers to the centenary of the establishment of the first community foundation in Cleveland, USA. It seemed an appropriate moment, said Jenny Hodgson of the Global Fund for Community Foundations, to look at the 'state of play' in community philanthropy, based on research conducted over the previous several months, which shows the leading characteristics of the field, its contribution, its strengths and weaknesses, and begins to explore how to move it forward. What, in other words, comes next? Barry Knight, one of the researchers, added a caution that the atlas is based entirely on self-reported data (in fact, the project had been used to pilot the Global Data Charter he said).



Four hundred responses had been received from 2,200 community philanthropy organizations, broadly conceived, that had been identified. Knight outlined some of the main findings:

The respondents came from 40 countries, more than half from the USA.
Over three-quarters have an endowment.
Those with the largest incomes are getting richer (in many cases, because of their endowment).
Those that are worse-off tend to be those started through community activism.
The three characteristics respondents believe are most important are accountability to the local community, building inclusion and making grants.

When it comes to achievements, these differed between North America and the rest of the world. North American CPOs feel that their main role is to help create a culture of giving. In the rest of the world, respondents feel they contribute to the creation of trust, greater responsiveness from authorities and social change.

And support organizations? Grantmaker associations generally rank fairly low in terms of helpfulness to individual CPOs. Most often, a particular foundation is the mainstay.

What did community philanthropy look like in different places? Nathalie Wierre from Centre Français des Fonds et Fondations remarked that there is now a group of some 60 community foundations in France but, significantly, they don't call themselves that. What has been important in creating such a group has been finding a language to define their work and a common framework through which they can point to others doing the same or similar things. This creates both a sense of solidarity and the possibility of mutual learning.

Alina Kasprovschi from the Romanian Federation of Community Foundations said the development of CFs in Romania had exceeded all expectations. There are now 30 but they struggle with funding. None of them yet has an endowment. In general, there were more questions than answers, especially from those areas where CPOs are yet to take hold. Joyce Teo from Community Foundation of Singapore wondered about good models to help CFs develop. How do CPOs cooperate and what do they find useful, asked Stefan Cibian from the Association for Community Relations in Romania.

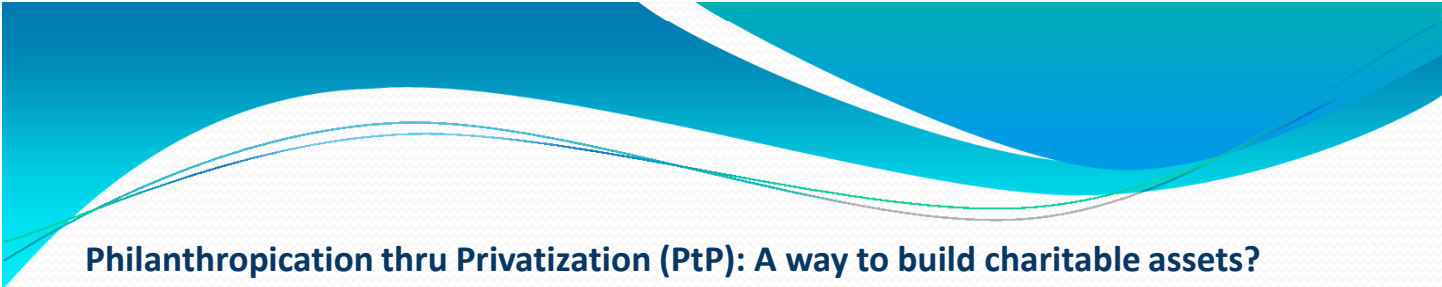


Chandrika Sahai of the Working Group on Philanthropy for Social Justice and Peace said that CFs in India are seen as a 'western' import. One of their hallmarks is the building of social capital, usually measured by 'soft' indicators. Is there any quantitative data on this, she wondered. If so, it would help make the case for CFs in India.

Nick Deykachiwsky from the Mott Foundation highlighted the importance of the mapping exercise. CPOs are great vehicles for citizen participation, he argued, and that is the real point, not the amounts of money involved. This survey helps to shed light on both the 'hard' and 'soft' data produced by the community philanthropy sector.

'It's exceptional, really excellent. This is my first time, and for me it's been so helpful because in Bulgaria, representing the largest foundation, we don't really have peers; as a manager, I don't have a peer to compare with, so this has been an incredible learning opportunity and a chance to meet colleagues. We are a foundation not an association but it has been helpful in many aspects.'

- Desi Taliokova, America for Bulgaria Foundation, Bulgaria



Philanthropication thru Privatization (PtP): A way to build charitable assets?

Presented by Instituto para o Desenvolvimento do Investimento Social (IDIS)

Track: Knowledge & Skill Building

‘There are those who see things as they are and ask why. But I dream things that never were and ask why not?’ This was Senator Robert Kennedy paraphrasing George Bernard Shaw, said Marcos Kisil of IDIS, introducing the session. Organizations around the world are starved of funds. Where will indigenous funds come from? Where will capital come from for community foundations?

There is a solution right before our eyes, said Lester Salamon of Johns Hopkins University, presenting. It is most visible in the story of the Italian foundations of banking origin, where the banking functions and charitable functions of Italian savings banks were separated, with the foundations retaining 100 per cent stock in the banks. Today the Cariplo Foundation is bigger than the Ford Foundation, and this is just one of 88. In New Zealand the savings banks were transformed in the 1980s. The Czech Foundation Investment Fund was formed from 1 per cent of the proceeds of privatization and the money was distributed between 70 odd different foundations as endowments. The California Endowment was formed out of the Blue Cross insurance company in 1993. And these are just a few examples.

The first step for the Philanthropication thru Privatization (PtP) project was conceptualization. ‘Concepts are the lenses through which we view the world,’ said Salamon. ‘We didn’t have the PtP concept so we didn’t see the potential.’ While privatization is the transfer of ownership from government to private hands, philanthropication refers to public or quasi-public assets being transformed into charitable endowments under control of meaningfully autonomous charitable institutions. This could be a state-owned enterprise or other asset, e.g. La Scala opera house in Milan, or control of the flow of proceeds, e.g. National Lottery funds in Belgium going into King Baudouin Foundation, or debt swaps where a country’s debt is relieved in return for a foundation being formed. Salamon insisted that he had ‘no position for or against privatization’, but if it’s occurring people should get some tangible benefit from privatization of what are people’s assets.

The PtP project has discovered 539 PtP foundations throughout the world in 21 countries owning at least US\$135 billion in assets, mostly formed in the 1990s. Most are small but over 12 per cent are worth over \$2 billion. It seems that philanthropication happens when it’s helpful or necessary – as a practical solution to a real problem, for example where there is public opposition to a proposed privatization or legal obstacles.

With significant assets still available for privatization, there seems to be great potential for PtP, provided civil society and others seize the opportunities and push for it. The session attracted surprisingly few participants given its enormous potential importance as a way of bringing new funds into the foundation sector.

‘I loved the conference. It’s always refreshing to get perspectives from peers from around the world. The delegates are amazing; there are people from absolutely every corner of the globe, and it gives you insights you don’t get when you’re talking to people from your own country.’

- Carol Mack, Association of Charitable Foundations, United Kingdom

Concurrent Workshops

Friday, 28 March: Session #3

The 'Networked' Network: Collaboration for More Strategic and Effective Philanthropy

Presented by The Foundation Center & International Human Rights Funders Group
Track: Networking & Collaboration

Prompted by Jo Andrews of the International Human Rights Funders Group (IHRFG), who chaired this session, participants highlighted the difficulties of collaboration: different or unclear expectations, picking the right partners, differences in organizational cultures, excessive optimism about time, and having to prove results to your board.

So why do it? On the panel, Mona Chun from IHRFG said that her organization had been exercised about the lack of data on human rights funding. Five years ago, they had decided to partner with the Foundation Center in order to get access to their expertise in collecting and panelists data. The focus of both organizations, however, was very much on the US, so they had brought in others – Ariadne and the International Network of Women's Funds (INWF).



What had the partners got out of it? The Foundation Center had realized, said Larry McGill, that the taxonomies they used for panelists grants data were not well suited to the human rights field. As a result of the collaboration, not only had they developed a more sensitive taxonomy, they had also got to work with a set of organizations outside the US, which had widened their ideas on collecting grantmaking data.

Mona Chun echoed this sense of expanded horizons. Though the initiative had started as a mapping exercise 'of members for members', it had identified others human rights grantmakers, thereby offering the opportunity to grow the field and to open dialogue with a fresh set of funds. Lucia Carrasco from the International Network of Women's Funds (INWF) felt that the best result from INWF's point of view is the change at the Foundation Center, which did not previously track grants of less than \$10,000, while most women's funds make grants of less than \$6,000.

Also represented on the panel was the Bridge Project, a collaboration between TechSoup Global, GuideStar and the Foundation Center in the person of Sheila Warren of TechSoup Global. Each of these organizations uses different definitions and taxonomies, which was an obstacle to collaboration, so they had worked together to produce a global identifying number. The success of a collaboration, she stressed, isn't just a matter of working through differences in organizational culture; it's about personality, too. If the people involved don't get on, you need different people. Trust is a key factor, all the panelists agreed.



organizations,

Even so, it is important to have a written agreement, setting out responsibilities and expectations, and drafting such a document can be difficult, given the need to reconcile differing viewpoints. For Larry McGill and Mona Chun, the terms of the relationship had posed a particular challenge. While IHRFG wants a partnership, the Foundation Center is a service provider, as Larry McGill pointed out, so it sees the relationship in different terms – 'for us, it's business'. And the work itself was problematic. At bottom, four US

said Sheila Warren, are trying to create a global identifier.

What are the limits and how do you ensure that you take other views into account without widening the collaboration to the point where it becomes unmanageable. To help overcome this, Bridge is careful to stay in touch with other sources of information, she said.

Members of the audience raised other questions: one was the need for partnerships to remain open. Any change can derail it, but it is a dynamic process and change is inevitable. You just have to cope with it as well as you can. Finally, for the whole group, two elements are seen as crucial to the success of a partnership: trust and flexibility.

'WINGS provides an important venue through which each of our associations, which operate in different cultural contexts and represent diverse types of members and funding interests, can share successful strategies and lessons learned about contributing to structural change.'

- Christen Dobson, International Human Rights Funders Group, United States

Effective Philanthropy for Countries in Transition: How Foundation Networks Can Make the Difference

Presented by Institute for Integrated Transitions and John D. Gerhart Center for Philanthropy and Civic Engagement, American University in Cairo

Track: Discussions from the Field



‘It is clear that foundations are custom-made for transition moments,’ said Mark Freeman of the Institute for Integrated Transitions, one of the panelists. ‘They have a set of comparative advantages that are incredible if used well.’ Foundations are nervous – and should be, he went on, but they can do great things. There are democratic and post-conflict transitions all over the world. These are the moments in a country’s history where they really can take a big step forward; opportunities to achieve disproportionate positive impact.

Freeman met with Barbara Ibrahim of Egypt’s Gerhart Center for Philanthropy in Tunisia a few years ago, and from that meeting *Supporting Countries in Transition: A Framework Guide for Foundation Engagement* was born. What they realized, explained Ibrahim, who was the moderator, was that there are decades of experience of transitions in different places but none of this experience is brought together. Over the next year they talked to people within the field of ‘transitology’ – a new term for me – as well as with funders and think tanks; they tested out their findings with groups of funders in Europe, New York and Cairo.

What are foundations’ comparative advantages in ‘transition moments’? Independence and flexibility are two ... one European official is reputed to have said that the Egyptian revolution had arrived at the wrong time in their two-year budget cycle! Foundations, by contrast, can move quickly – though Ghanim el Najjar of the Arab Human Rights Fund warned that funders can come in too quickly because they see it as a moment that mustn’t be lost.



Transition environments are different from more static times; you need to do everything differently. Yes, foundations have to do extra due diligence; they have to be more willing to take risks – in general, it was said, they need to ‘go up a level’. But if they do so, this can reap big rewards in terms of social impact.

Foundations also have the potential to support controversial processes, to help create a political culture of dialogue – something a government funder couldn’t do. Not that this is always easy for a foreign foundation – hence the importance of local philanthropy.

But where a foundation has been in the country for decades, like the Ford Foundation in Egypt, said Noha El-Mikawy, it really feels like part of the community and can play a key role. Ford was part of the Development Partners Group, which included all development partners in Egypt. They also held regular reflection meetings with grantees, which was really important in helping to create solidarity.

What about networks? Do they have a role? One crucial role they can play is gathering information. Following the Tunisian Revolution, suddenly everyone wanted to know about civil society. Over a dozen separately commissioned civil society mappings were done; these were not shared and a lot of people were annoyed in the process. Information gathering, civil society mapping, knowledge sharing – all these are tasks for networks.



Avila Kilmurray of Community Foundation for Northern Ireland made the point that intervention is needed before, during and after a transition, not just at the ‘moment’ identified by the media. She emphasized the importance of getting activists from different sides in the conflict away to a neutral place to reflect – a point echoed by Shelagh Gastrow of Inyathelo in South Africa. Afrikaners and ANC members met in various countries before the transition in South Africa, she said, and the meetings included networks of poets, military, etc. – all funded by philanthropy.

‘I feel lucky to be here. It is clear that planning for the sessions over these three days goes back many months. I’ve attended incredibly interesting sessions—practical, from the viewpoint of what we do on a daily basis, but also sessions that dealt a lot with vision, and that is the best part of this meeting. And of course, the opportunity to meet with peers from around the world and talk about issues.’

- Rosa Gallego Garcia, Spanish Association of Foundations (AFE); Donors and Foundations Networks in Europe (DAFNE), Spain

Concurrent Workshops

Saturday, 29 March: Session #4

Emerging Philanthropies, Emerging Philanthropists:

Private Donors in Emerging Market Countries

Presented by Edmond de Rothschild Foundations, Emerging Societies-Emerging Philanthropies, and Inyathelo: The South African Institute for Advancement

Track: Knowledge & Skill Building



How do networks work for private donors in emerging market countries? The session set out to explore this question through the example of three peer exchanges: Inyathelo's philanthropy circle in South Africa, the Edmond de Rothschild Foundation's Empower Families for Innovative Philanthropy (ERFIP) and the Emerging Societies – Emerging Philanthropies initiative.

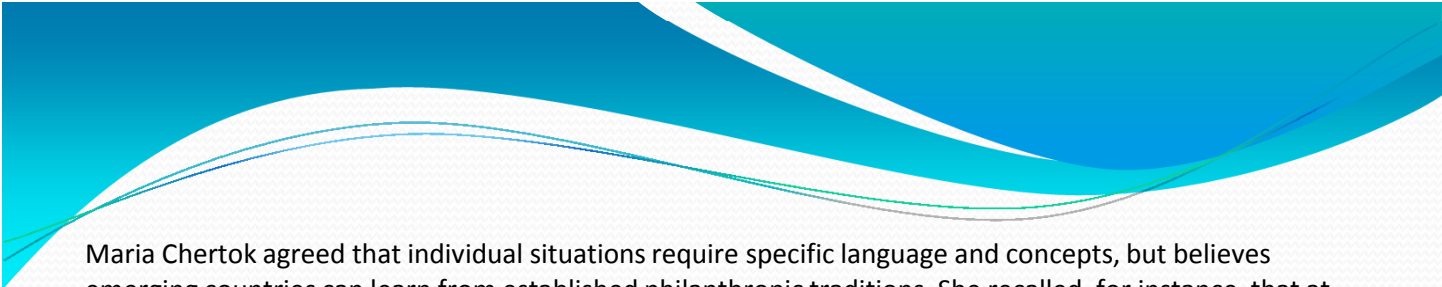
Inyathelo, said Shelagh Gastrow, set up its network in 2010. South African philanthropy had traditionally been secretive,

and at first it had been a 'nightmare' getting people to talk. But it has stuck to certain rules: it is self-funded, it sets its own agenda, and participants must be local. From nine members, it has now grown to 35. Trust has developed (members will now discuss their failures), it continues to be peer-driven, and it has clout because of the money and the collaboration involved.

The Emerging Societies – Emerging Philanthropies Forum, said Maria Chertok of CAF Russia, brought together a hundred or so donors from around the world in St Petersburg last year. They had found a great deal in common, including the problems posed by working in an environment where private philanthropy has little official recognition. She also mentioned CAF's ongoing involvement in another project designed for donors from emerging markets, the Foundation School. It brings together 15 or so people over five days, who pay their own way because 'if it is given for free, it is not valued', she said.

ERFIP sprang out of a sense of frustration among donors in the Global South, said Firoz Ladak, executive director of the Edmond de Rothschild Foundations. Courses don't give them what they are looking for, and at big gatherings like the Clinton Global Initiative there is no real knowledge sharing. Consequently, Rothschild organized a retreat specifically for such donors last September. They were encouraged to bring professional advisers and family members. There was no one from Europe or North America.

The three presenters noted some common challenges. The contexts in which donors are working are very different within and between regions. Societies in emerging market countries are often dynamic and fast-moving. Moreover, Global South donors often want to differentiate themselves from northern debates about philanthropy and about the relationship between the state, philanthropy and civil society.



Maria Chertok agreed that individual situations require specific language and concepts, but believes emerging countries can learn from established philanthropic traditions. She recalled, for instance, that at one Foundation School donors from emerging countries had found a surprising consonance with the situation of Italian philanthropy. Similarly, Prapti Upadhyay from the Lien Centre in Singapore remarked that, differences notwithstanding, there are some common challenges across many middle-income countries in South East Asia – growing youth unemployment, for example.

As regards donor education, Amanda Bloch from the Inyathelo Philanthropy Circle, who is also a donor, said that donors don't necessarily want formal education and would rather learn from their peers. From this collaborations develop, she said, giving the example of the Green Matter Trust which has grown out of the circle's environment and education hub and has created university posts and other jobs and helped protect the environment.

The liveliest controversy of the session was provoked by Ruth Jones of SVPI asking whether the groups challenge their wealthy members to use their wealth wisely and confront them with the circumstances from which their wealth often insulates them. Shelagh Gastrow responded that it is impossible to be isolated in South Africa since poverty is 'right in your face'. What's more, remarked Amanda Bloch, many donors have set up foundations whose money is 'institutionalized' and not to be used on a whim. 'We engage with partners,' she said, 'and the missions of foundations are formulated in response to a need. We *are* in touch,' she insisted.

It was left to Maria Chertok to pour oil on to waters that were becoming turbulent. The question might be reframed, she said. Sometimes donors don't appreciate that there are NGOs who are already working on the same issues, but donors want to do their own thing. Some brokering of partnership and collaboration is therefore required.

'Everybody wants what we see around us in this conference. Everybody wants to be a part of this global movement. This is perhaps the most exciting conference I've attended in many years, simply because there's a sense of anticipation that we're on the verge of breaking through a lot of old silos that have existed for a long time in the field, and that we're finally recognizing that if we come together at the level of broad principles and the desire to be transparent, we can make something happen that makes philanthropy much more effective in a way that we've never had the possibility before. In my opinion WINGS has finally taken off.'

- Larry McGill, *The Foundation Center, United States*

Interviews

Interview with WINGS Chairs, Past & Present

Barry Gaberman, Independent Philanthropy Professional

Monica Patten, Director, Resources for Development, Anglican Church of Canada

Atallah Kuttub, Founder, SAANED for Philanthropy Advisory in the Arab Region

With three out of four WINGS chairs in Istanbul for the fourth WINGSForum, it seemed like a good opportunity to get them all together and ask them how WINGS has changed since its early days, how they see the organization now, and how they'd like to see it develop. Caroline Hartnell spoke Chairs past and present – Barry Gaberman, Monica Patten and Atallah Kuttub.



The achievement of surviving at all

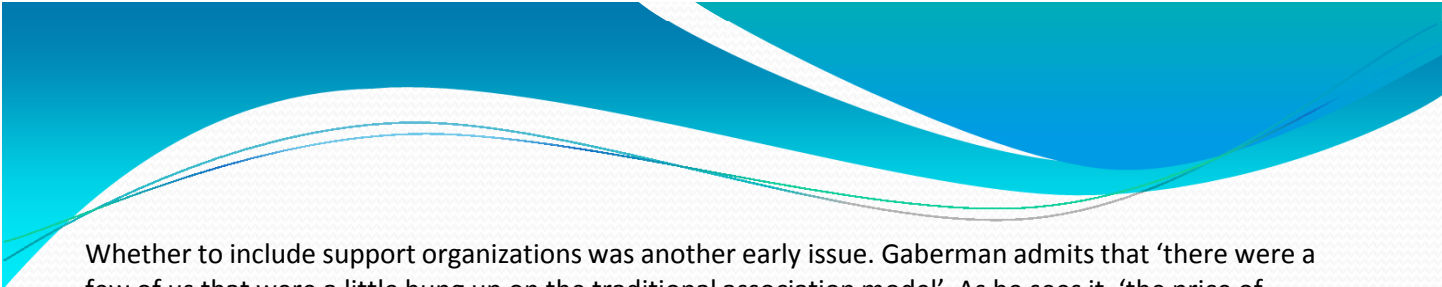
For Barry Gaberman, WINGS first chair and true ‘founding father’, the most significant thing about WINGS is that it has survived. ‘It’s 16 years since IMAG and it’s still here. It survived in an environment that has been somewhat hostile to supporting infrastructure organizations, and it survived the naivety of some of us who were there at its creation. I sometimes laugh when I think that we were going to rotate WINGS every two years – all we’d have done is pack! It’s outrageous, it’s a stupid idea!’

The idea apparently came from the feeling that ‘we didn’t want it captured by anything’. The idea that WINGS didn’t have to be a legal entity also came from ‘a positive notion that you didn’t want to create another structure that had to be captured some place that was going to require a whole lot of resources and all that’. But, says Gaberman with the benefit of hindsight, ‘it would never develop and mature as an organization unless it was grounded. So there were these well-meaning, idealistic notions, and it has survived those and evolved.’

Monica Patten agrees that the idea of rotating WINGS every two or three years was ‘the right stupid idea’. ‘We wanted to go where philanthropy was growing and emerging,’ she explains. Philanthropy was at a different place at that time. ‘I love to see the way philanthropy has grown and WINGS with it. It’s been fascinating to observe how very inclusive WINGS has become.’

Who to include?

For Patten, this is not just about geography. For her, the questions in the early days were: where does community philanthropy fit in? what about corporate philanthropy? And so forth. ‘For the most part I think that WINGS has done this well,’ she says. ‘Speaking through the community philanthropy lens for a moment, that was a struggle. I remember having conversations among ourselves about how community foundations fitted in, and we broadened the notion of community foundation to community philanthropy, which I think was an important step.’



Whether to include support organizations was another early issue. Gaberman admits that ‘there were a few of us that were a little hung up on the traditional association model’. As he sees it, ‘the price of bringing community philanthropy into the umbrella was including philanthropic support organizations because they existed with the community philanthropy slice, but not with the broader one.’ Again with hindsight, ‘you realize having that other slice in the pot enriches the pot so much.’

The decision to include community foundations and support organizations was taken in 1999, the year after IMAG. In fact, Gaberman recalls, ‘it was the community foundation side that had the energy at that point. At the same time, what the funders were saying was that we’re not about to support both, somehow you’ve got to get your act together.’ Patten agrees about the energy: ‘I think Barry is right that the community foundation network had a huge energy at that time and brought some of that energy to WINGS. So there really were two pieces that came together to form WINGS.’

‘Monica had a wonderful drawing of an umbrella,’ Gaberman remembers, ‘and the spokes were like affinity groups or subsets – community, corporate, regional, support – and the notion was that the umbrella included everything. But there were distinct subsets with particular needs, and that’s still the case.’

Should we let funders in?

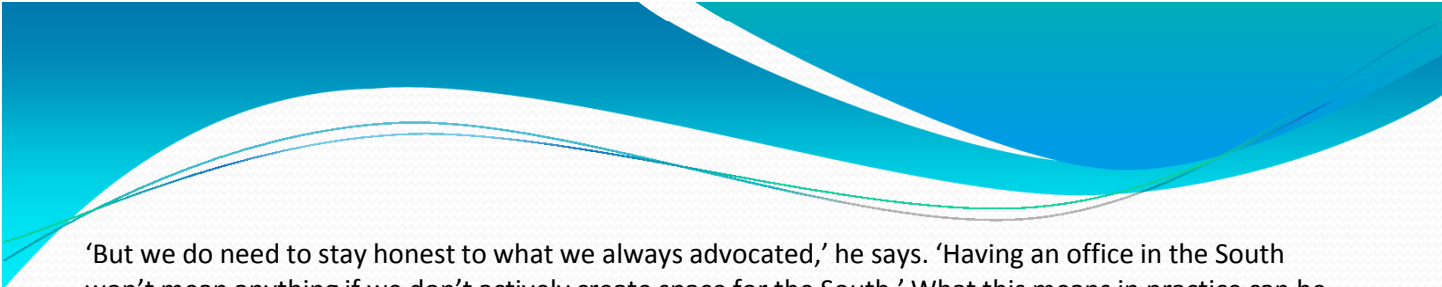
Still focused on the ‘who to include’ issue, Patten reminds Gaberman of ‘the spirited discussions we used to have around the WINGS table about whether we’d let funders come to WINGSForum. We felt that we needed to limit it because if we had too many funders, they would have too much influence.’ For the Istanbul Forum, associations and support organizations made up just 32 per cent of participants. ‘The construct of this conference is quite different from in the past, and I think that’s where WINGS has evolved to, and it feels right to me.’

Several people she talked to during the Forum, ‘people I don’t know, not from membership associations, but other consultants or funders’, have said that the biggest value of the Forum is the networking. ‘A predominant *raison d’être* for WINGSForum is its ability to connect people with each other across the globe.’

Incorporation and the move to Brazil

The decision to move to Brazil more permanently, with an incorporated office in the US, was made when Fernando Rossetti was chair, based on a feasibility study. The chair of the ‘new look’ incorporated WINGS with its office in Brazil and dues-paying members is of course Atallah Kuttub. How does he feel things are going with WINGS?

‘At a structural level,’ says Kuttub, ‘I think we are around the corner. It took us quite a while to move from being a coordinating committee that manages to a board of directors that governs, but I think we have made that transition.’ This is made easier because there are so many new members – as evidenced by participation in the Istanbul Forum – who are not familiar with the older ways of doing things.



‘But we do need to stay honest to what we always advocated,’ he says. ‘Having an office in the South won’t mean anything if we don’t actively create space for the South.’ What this means in practice can be seen in WINGS’ relationship with the Foundation Center. ‘WINGS and the Foundation Center have a joint project on philanthropy data where the Foundation Center brings data collection and data analysis expertise and WINGS brings global reach and global perspective.’

Should WINGSForum focus on big issues?

Another question for Patten – and one that arose sharply in the ‘trial of associations’ (p XX) – is whether the Forum should focus on big issues. ‘I remember this very lively discussion at Como about corruption, but there hasn’t been any of that here; it’s been a much more practitioner orientated conference. That may be how WINGS is evolving – although I personally would prefer a slightly different kind of agenda.’

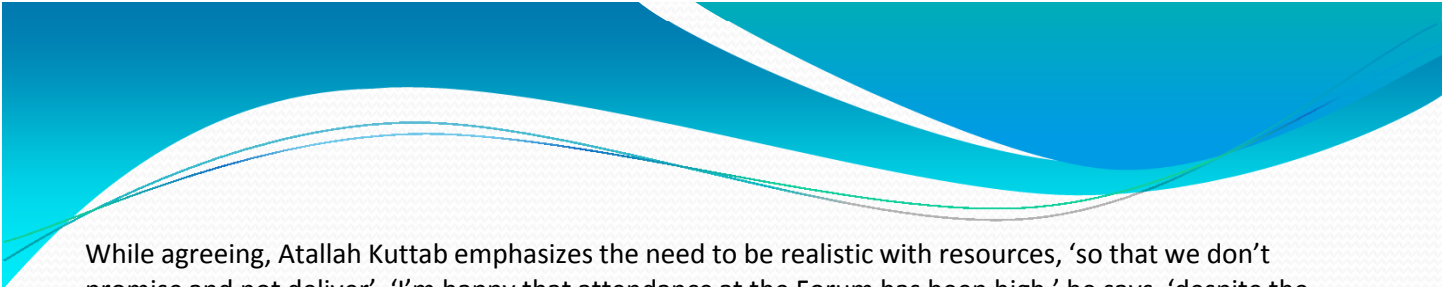
In Kuttab’s view, associations tend to oversell themselves – as reflected in the trial. ‘We say we have to change the world when in fact governments are not able to do that. We have to be more modest in defining exactly what WINGS is delivering, so that we can be held accountable and expectations are right.’ It wasn’t by chance that the Forum avoided taking up global issues, he says. ‘We wanted to define the role of an association, and to separate out the role of associations, foundations, advocacy players, and so on.’

One thing he does see as a key role for WINGS is building a global perspective for philanthropy. And this means ‘doing better as a processor of knowledge from the various regions. As a global network our strength lies in the diversity and knowledge of our members. To maintain our leadership we must encourage all of our members to share their knowledge, ensuring emerging philanthropies have the space to express their experiences and be heard.’

Imagining WINGS in five years’ time

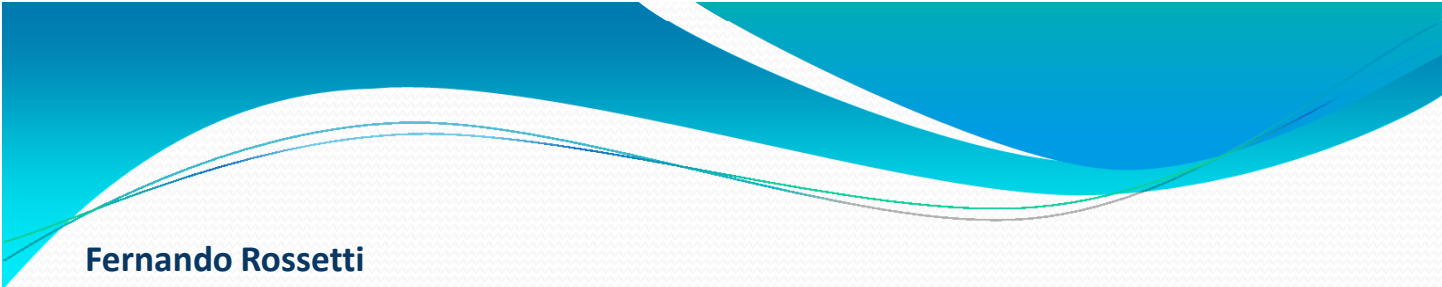
How would you like to see WINGS five years from now, and what are the challenges in getting there? ‘The debate for the next five years,’ says Barry Gaberman, ‘is going to be does WINGS remain a knowledge hub, a place for practitioners and member services, or does it move a notch above that? It probably needed to go through the phase it’s in now to establish its grounding and its bonafides and all that, but I see no other network in the world that can speak to really important substantive issues. Of course it will need to be selective about those, and some may really be self-interest. Take the enabling environment – it’s not just about helping to build it; it’s protecting it. WINGS has forged this wonderful alliance with the Foundation Center on data – is there a way to form something with the International Center for Non-for profit Law? Monica raised the issue of corruption – I don’t know what the issues will be but it seems to me there ought to be a few really meaty things that go beyond serving associations – and that’s the nature of debate that I would hope will take place when WINGS looks at its next strategic plan.’

Monica Patten focused on collaboration and WINGS remaining global. ‘We have the example of the partnership with the Foundation Center and the ICNL suggestion. I think that there are other opportunities for collaboration, so I hope that happens. I think the other hope for me – and I have no reason to be doubtful about this – is that WINGS remains really global. I’m thrilled that we’re located in the South, and that we’ve got a lot more southern membership and participation, but I do think we need to remain truly global in the fullest sense of the word.’



While agreeing, Atallah Kuttub emphasizes the need to be realistic with resources, ‘so that we don’t promise and not deliver’. ‘I’m happy that attendance at the Forum has been high,’ he says, ‘despite the attractions of Istanbul! This morning at the members’ meeting people were proposing ideas and offering support to help implement them. I think the next step will be to have sub-constituencies within the bigger one, so we have grantmakers with their agendas and pushing WINGS to deliver what they want, and the service providers (what I call the support organizations) doing the same.’

Asked about his elevator speech on WINGS, Kuttub replies: ‘You know, if we have just one floor to go, I would say it’s a platform for a truly global perspective on philanthropy.’



Fernando Rossetti

Executive Director, Greenpeace

Sadly, Fernando Rossetti, WINGS chair 2008-12, was not able to attend WINGForum and be part of the interview with the other WINGS chairs, so we asked him for his comments on developments at WINGS under his watch.

The period in which I chaired WINGS was a turning point not only for WINGS but for the whole philanthropy sector. While infrastructure reached saturation point in North America, philanthropy generally became more focused and more results-oriented, with more funders deciding to operate their own programmes.

WINGS was created with generous grants from a handful of predominantly American foundations, such as Ford and Mott. By the mid 2000s this kind of funding for infrastructure had practically dried up. Although philanthropic initiatives were mushrooming in the Global South, neither grantmaking nor the building of civil society was a major strategy.

So WINGS was challenged to build a new business model, in which its members would pay annual fees. What would they get in exchange? Knowledge? Services? Leadership? A network of peers? While members from the South tended to favour a services approach, those from the North, notably the US and Europe – where resources are still much more plentiful – favoured leadership. The crucial debate was: how are we going to sustain the organization, considering these different demands? The solution so far had been to build a portfolio of activities that aims to meet the many needs of the field.

The decision was taken to incorporate WINGS in the US, due to its favourable legislation, and to relocate to Brazil, politically and economically stable with a booming philanthropy sector. The new structure, which came into being in 2011, brought huge, unexpected challenges. Brazil's bureaucracy and its baroque labour legislation took enormous chunks of the secretariat's limited time. While experimenting with the creation of new services and products, much work had also to be done to ensure, for example, that the organization's limited resources flowed to where they were most needed.

The board of directors and secretariat did a great job keeping WINGS afloat in such turbulent waters. The success of the third and fourth WINGSForums, in Italy (2010) and Turkey (2014), reasserts the demand for global philanthropy infrastructure.

But the fact that WINGS is based in the South radically changes what global philanthropy is about. It is no longer only about grantmaking abroad – mostly from North to South. It is about the many different ways in which private resources are being used for the public good worldwide. So I conclude by endorsing Atallah Kuttub's statement in the joint interview: WINGS has become 'a platform for a truly global perspective on philanthropy'.

Tevfik Başak Ersen

Secretary General, Third Sector Foundation of Turkey (TUSEV)



As the secretary general of the host organization, TUSEV, how does it feel to have WINGSForum here?

It's really great because this is not just hosting a WINGS event. Part of our purpose as a foundation is to try to bring WINGS-like structures to Turkey, so that Turkish civil society can benefit as well as our members. So it's not just about bringing WINGS here, but also sharing all this expertise and knowledge with Turkish civil society organizations. We also hope the Forum will help in our efforts to strengthen philanthropy development in Turkey, which is one of TUSEV's core working areas.

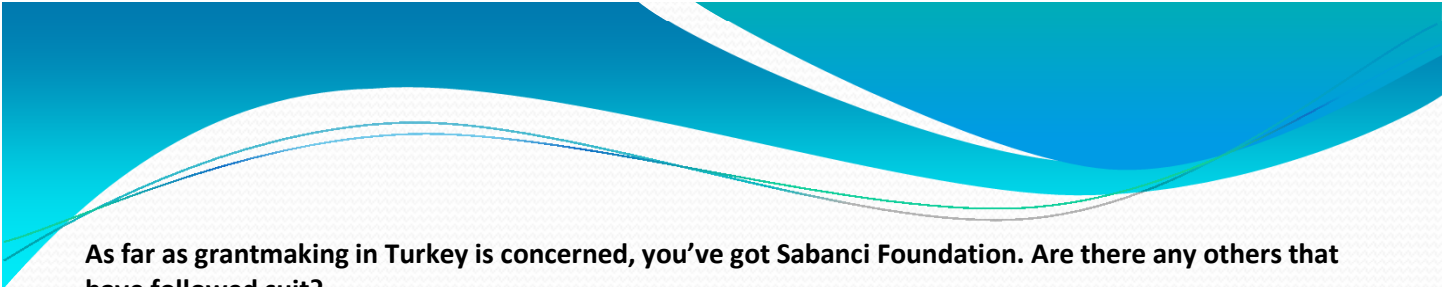
How is TUSEV structured and what is your mission?

Actually we're a private foundation. The main reason is that the old associations law in force in the 1990s provided an unattractive legal structure for an association. We should be an association of foundations like the EFC because that was the model. The founders of TUSEV, the biggest foundations in Turkey, realized that there were some big problems to solve, and that was the main purpose of establishing TUSEV. So for almost ten years TUSEV's main role was to deal with legal issues and government relations. In time we took on other programme areas, but the legal reform programme has always been our main area.

Now we also have social investments where we try to encourage giving, and to introduce new models like community foundations or venture philanthropy. So in that sense we try to lead the sector and bring these new concepts to Turkey. We also have the international relations programme, and it's under this programme that we are hosting WINGS. As I mentioned earlier, if we can bring all this expertise and all these organizations and events here, Turkey can directly and indirectly benefit. We have hosted the EFC before and ISTR, among others.

So is TUSEV for foundations, i.e. for the donor side, rather than for civil society more broadly?

This is a very problematic question in the Turkish context because we simply don't have the concept of grantmaking. So even if you're talking about foundations, I cannot call them donor organizations because they're almost 100 per cent operating foundations. Our members are almost all foundations, and we do also have some associations as our members. But we position ourselves as a civil society serving organization, meaning that we deal with both associations and foundations. So we don't do anything just for our members; we try to do it for the whole sector.



As far as grantmaking in Turkey is concerned, you've got Sabanci Foundation. Are there any others that have followed suit?

Actually, Sabanci wasn't the first. The biggest so far, and really the only grantmaking foundation in Turkey, is Open Society Turkey Foundation, which was established as a Turkish foundation. Sabanci has a grantmaking programme, but it's not a pure grantmaking foundation. When you consider the foundation's total budget, their grantmaking programme is small – though they are trying to increase it. Still, the grants they have given out are important for the sector.

So though you could say there are seven grantmaking foundations in Turkey, only Open Society is purely grantmaking. The others have small grantmaking programmes, and among those Sabanci is the biggest.

Are there any other associations like TUSEV in the civil society sector in Turkey?

There are some organizations that deal with specific issues, but I can't name any like TUSEV because we cover a huge variety of different programmes and projects. On the legal side, we're the only specialized foundation in Turkey, and there are no others working in areas like international relations and research. There are some other organizations working on social investment infrastructure, but this is just one of our programme areas.

How have you personally found the Forum?

I think it's a great gathering because WINGS is a unique structure. I love the sessions, there are great and inspiring speakers. One good thing that makes it different from others like the EFC, for example, is that it's not just the big names like the presidents or the trustees that are here, but the people really working on the issues, the real practitioners. It makes a lot of difference, and gives people a good opportunity for networking.

Janaina Jatobá

Community & Institutional Development Manager, C&A Institute



How did the C&A Institute come to support WINGS?

The C&A Institute has a tradition of supporting the infrastructure for civil society and for philanthropy – or for private social investment, as we call philanthropy in Brazil. We've been doing this in a systematic way, within a programmatic framework, for five years now, but the C&A Institute has supported private social investment infrastructure projects and organizations in Brazil since the 1990s, especially through seed grants.

When it was known that WINGS was coming to Brazil, it seemed very important to have Brazilian recognition and to support WINGS' arrival. So we helped WINGS establish themselves in Brazil; we were one of the seed donors. We also believe that Brazil has a role to play in sharing our new approach to private social investment. We want to share with the rest of the world and learn with the rest of the world.

Did the fact that WINGS is a global organization make it more difficult for you to support them?

Yes, it did. Although C&A is a global corporation, as C&A Institute we only work in Brazil. So the issue for us was very specific: how can we support WINGS to arrive in Brazil and to align with the strategy of GIFE, which we also support, to improve the transparency and accountability of institutes and foundations? For us, having Fernando Rossetti [then Secretary General of GIFE] on the WINGS board really helped us to dialogue better, and having Helena Monteiro as WINGS director, a professional known in the sector and in Brazil, also helped.

Can you tell me about your support for the Global Data Charter?

WINGS and C&A Institute had an institutional recognition meeting during which we identified that the Charter proposal was in line with the accountability and transparency work that we were developing for the Brazilian sector in partnership with GIFE. So actually it was very aligned with the work we were doing; it was very easy for us to partner with WINGS! As a Brazilian institute that wants to improve accountability and transparency, we think that being involved in this global discussion will help us to influence other local foundations and institutes. As a partner of IDIS and GIFE as well as WINGS, we will be able to build a common (and complementary) approach to other institutes and foundations in Brazil.

I participated in both meetings about the Global Data Charter. It was very nice to be really engaged in the thinking and the discussion and in helping to create this awesome document.

And how have you enjoyed WINGSForum?

Very much. It was important for me to see that some issues in Brazil are like a fractal piece of the global picture. We are especially struggling with grantmaking issues there: people want to move already to venture investments and impact investments before even trying grantmaking. The C&A Institute is a traditional grantmaker; we have 23 years of grantmaking in Brazil.

Patrick Collins

Chief Information Officer, The William and Flora Hewlett Foundation

When did the Hewlett Foundation start supporting WINGS?

We gave WINGS a general support grant for \$25,000 towards the end of last year. That came about because I participated in the Global Data Charter meetings. In the course of that project it became clear that it would be helpful for WINGS to have additional resources, first of all to bring the report to this meeting in a nice printed form and then to look at some follow-on activities. It's a one-year grant, so to be revisited soon.



What sort of follow-on activities are you interested in doing?

Well it's really what the WINGS members want. The Global Data Charter is so new that it's not entirely clear what the follow-ups will be. But I do think that there's going to be some kind of ongoing role for WINGS. Not that they're necessarily going to become a data aggregator, but it's really about helping in their usual way with networking and education and highlighting use cases and best practices.

One of the reasons I'm participating in the Charter is that each association and each region has very different levels of maturity. We had a gentleman speaking up from Western Europe during the session on the Charter yesterday who already had a very developed data collection programme, and they're looking at the Charter as a way to take that to the next level, whereas there are others that are not even collecting detailed data, they just have aggregate data from their region. I know we had a number of people sign on to the Charter yesterday after the panel, so it will really come down to what their needs and interests are. Will a networking group come out of this? Will future conferences have a work stream or programmatic theme around data? This is all to be determined.

How is the Foundation Center involved in the Charter?

Well, they participated in both the meetings for the drafting of the Charter and they have been partnering with WINGS and providing some support because they see this as strategic. The Foundation Center is moving beyond just being a resource about US philanthropy; they want to increasingly provide a picture of global philanthropy. But they can't do that themselves; they need organizations like WINGS to work with the associations. The politics and styles of philanthropy in different regions are so different, you need local knowledge and you need trust. Foundations, as was mentioned in yesterday's keynote speech, are very private; they need to trust the data will be used appropriately. So really it has to be a bottom-up model. The data has to come from the field itself. We had a great turnout yesterday, so there's clearly an interest.

How have you found the Forum so far?

It's my first WINGS meeting, so I had no idea what to expect, and this whole world of grantmakers' associations is a little hard to get your head around at first, but what has been interesting to me is the level of energy of the people here and the openness. Every single person you sit down next to or stand in an elevator with introduces themselves. The commitment to networking among this group is the strongest I've seen at any meeting. I think some of it is the size – it's a very manageable size – but it's very welcoming for a newcomer.

Jorge Villalobos

Executive President, Centro Mexicano para la Filantropia (CEMEFI)



CEMEFI has a long-standing involvement in WINGS. How did it start?

We hosted the IMAG (International Meeting of Associations of Grantmakers) meeting, from which WINGS developed, in Oaxaca in 1997. Subsequently, we were involved in the organization of the first Forum in Sydney, Australia and Lourdes [Sanz] became part of the WINGS Coordinating Committee and the WINGS-CF Committee. We have also held two peer learning events in Mexico and CEMEFI participated in an exchange with CAF Russia.

What has changed over the years?

Well, the world has changed and the world of philanthropy has grown considerably. There is a new vision. It's important to take into account that WINGS' development has taken place at the time when the polarization of the world into two camps ceased, at the time of the collapse of the Soviet Union and the opening up of Eastern Europe, of Africa, of Asia. Philanthropy has a key role in developing a new vision of the world, and WINGS has a key role in sharing different views of philanthropy. I don't know any initiative that has played such an important role in expanding philanthropy. It's the only platform that currently exists.

What do you think have been the highlights of this Forum so far?

Several 'generations' are represented. Some have been at all the WINGS Forums, but most of them are at their first. That means there is a transmission of ideas from those long established in philanthropy to those who are new to it.

How do you see the future for WINGS?

It's very important for WINGS to continue its expansion. In order to do that, it needs to adopt new technologies. Social networks, technology and social media are certainly the way forward if WINGS is to continue to grow and reach other countries and other people. I also think that building collaboration between corporate social responsibility programmes, foundations and civil society is a key element to expanding philanthropy and creating social good.

WINGS' role will be to continue providing a platform for meeting, networking and learning and to ensure information flows. In addition, for example, in Latin America, there is huge potential for the expansion of philanthropy but there is very little support for it and few opportunities for learning about it. I think there is an opportunity for WINGS to work more in the region.
reinforced.

How useful has the networking – the informal discussion between sessions – been?

It's been very important. It's an opportunity to share new ideas with people you know, but have not seen for a long time, and to meet new people, which also offers the chance of listening to new ideas and considering new possibilities of collaboration. I think that the title of the Forum, 'The Power of Networks', was well chosen because it reflects very well the potential we have as the WINGS network.

Chandrika Sahai

Network Coordinator, Working Group on Philanthropy for Social Justice and Peace



The Working Group is a fairly new member of WINGS. Why did you join?

We became members last October. Our mission is to influence mainstream philanthropy through the social justice discourse and we thought WINGS was an important forum to do that. Many of their board are leaders in social justice philanthropy forums and organizations. I thought the low membership fee was an indicator of those values. WINGS also seemed to be emerging as a true network, which would bring in voices in philanthropy that were at the margins.

You've talked about what you could bring to WINGS – a means of infiltrating mainstream philanthropy discourse. What did you think you would get from it?

WINGS' influence is growing and we thought they could help to spread a social justice philanthropy approach by grounding it in their infrastructure. Also, I believe WINGS can provide a platform for associations to hold each other to account. Associations are generally led by the dominant discourse and neglect voices on the margins. Some of the foundations I work with are working in conflict situations, in divided societies that don't have resources or influence. Associations have the resources, the knowledge and the power of numbers, but they are not putting in enough effort to be supportive of them. So we felt that, if we could influence WINGS, we would ultimately benefit our community of philanthropy practitioners who are on the margins of the philanthropy world.

Has the Forum lived up to your expectations?

The substance was very good, especially the focus on data. The kinds of foundations I work with, particularly, are often accused of only making moral arguments. In this world of market forces, if you can't show the numbers, people think you are not doing anything. Data was a constant theme, even at the sessions which were not specifically about it, and I think that has been a valuable aspect of the conference. From a lot of the conversations I've had in the corridors, many people have taken in the importance of data.

What was the highlight of the Forum for you?

Avila Kilmurray's speech. I also enjoyed the last session [In conversation with Ian Bird and Vikki Spruill], particularly Ian Bird's presentation, which was excellent. Philanthropy associations tend to be more organizational in structure and he talked about how his approach to his association is more of a real network approach, the focus on relationships and the fact that we fail a lot of the time because we are dealing with personalities.

Are there any specific things you would like to see WINGS doing between now and the next Forum?

Lead debate on what associations can do to support members who are on the margins. And, as a network coordinator myself, I would like more discussion about network approaches, building on the theme of this conference.

Silvia Bastante de Unverhau

Head of Philanthropy Advisory, UBS



Can you tell me about the Global Philanthropy Compass, what it does and what it's for?

The compass is a tool for advisers to use with philanthropists and entrepreneurs to help guide them through the philanthropic journey. It's a very structured approach that takes them through the building blocks of their philanthropy. It asks the questions that every philanthropist should ask themselves and it provides a number of examples to guide them. But at the end of the day it's not a prescriptive thing: it's meant to elicit reflection and to help philanthropists find their own answers.

What material have you used to create this?

We built in quite a bit of UBS's experience of advising clients all around the world on philanthropic matters and we worked with two other organizations, FSG Social Impact Advisors and Cass Business School, to take the frameworks that have been used in the past to refine them and bring them together into one body of knowledge that makes sense.

What are the different sections – could you just take me through them?

So the first section is about embracing philanthropy, and that's really about what philanthropists can get from embarking on the philanthropic journey. Often they underestimate how much benefit they themselves derive from this.

The second section is all about planning. This is very much forming a vision, developing a strategy, thinking about what are the best approaches to philanthropy. And the third section is really about implementing philanthropy. It has to do with thinking about who you would partner with and how you would set up the projects. The final section is about engaging others, and this has to do with involving your family and being part of wider networks..

You could have put together a document just for UBS advisers. Why did you decide to share it more widely?

This document was initially put together in 2011 and has been used successfully when advising clients. We realized that many others could benefit from this advice. So in the spirit of sharing and making a contribution to the sector, we thought we would make it public.. It will be valuable not only for our clients but for many other individuals who are thinking about how to plan their philanthropy, for other philanthropy advisers, and for the sector in general.

And why did you decide to launch it at WINGSForum? Were you pleased with it's reception?

We see WINGS as a well-established network that brings together grantmakers and foundations from different parts of the world. We thought it would be one of the best venues to launch the Compass because the whole point is to share it widely and with other organizations. Certainly, there was a lot of interest – both in philanthropy advisory as such and in the Compass itself. I was very pleasantly surprised with the level of engagement that we had from the audience at the presentation.

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