



Community foundations: Symposium on a global movement

Current issues for the global community foundation movement

informed by knowledge shared and
lessons learned

Eleanor W. Sacks



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Eleanor Sacks, as lead consultant for the planning and management of the Symposium, brought a depth of knowledge of the field and organising skills which were a major factor in the event's success. The Berlin-based conference organisers, *eventation*, were very effective in overseeing local arrangements and used their extensive contacts to plan evening events that provided an added dimension to the Symposium.

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From left to right:

Elan Garonzik (Mott Foundation)
Bettina Windau (Bertelsmann Foundation)
Monica Patten (Community Foundations of Canada)
Linetta Gilbert (Ford Foundation)
Heribert Meffert (Bertelsmann Foundation)
Peter Walkenhorst (Bertelsmann Foundation)

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Background

Community foundations: Symposium on a global movement, held in Berlin, Germany, 2-4 December 2004, was the first global meeting to bring together three groups of people: community foundation practitioners, organisations that support and promote such foundations, and independent and academic researchers, to explore current and future issues facing community foundations. The programme was drawn up by an Advisory Committee convened by Worldwide Initiatives for Grantmaker Support – Community Foundations (WINGS-CF). A list of the members of the Symposium Advisory Committee can be found in Appendix II to this report.

The Symposium was first proposed to WINGS-CF in 2001 by the Charles Stewart Mott Foundation and the Ford Foundation, long-time supporters and funders of the community foundation movement. The WINGS-CF Advisory Committee heartily endorsed sponsorship of the Symposium. It believed that the time was right for a global gathering of community foundations because the concept had spread well beyond North America and the UK, even to areas where prospects for local philanthropy had seemed to be less promising.

Further information about the Symposium, including participants, presentations and presenters' biographies, can be found on the Symposium website: www.cfsymposium.org

About Worldwide Initiatives for Grantmaker Support and WINGS-CF

WINGS is a network of more than 120 associations of grantmakers and other bodies which promote and develop foundations and grantmakers associations in more than 50 countries around the world which have joined together to strengthen and promote philanthropy. Within WINGS, constituent groups have formed to pursue their specific interests. The primary example is WINGS-CF, an active network that includes more than 70 organisations supporting the development and work of community foundations.

For more information about the report contact:

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About the author

Eleanor W. Sacks is a researcher and consultant on community foundation issues, and was the lead consultant for the Berlin Symposium. She specialises in community foundation programme, management and governance issues, in addition to tracking the global development of community foundations. Active in the field since 1991, she served on the staff of the Community Foundation Services group of the Council on Foundations as the Programme Coordinator for the Organisational Development Assistance (ODA) Programme. She is the author of numerous reports and articles on the growth of community foundations around the world, published by the Council on Foundations, Worldwide Initiatives for Grantmaker Support – Community Foundations (WINGS-CF), the Bertelsmann Foundation, and the Maecenata Institute. A number of her reports and articles are available in Spanish and German. Her email address is: ewsacks@earthlink.net.

162 participants at the Symposium

- from 33 countries from all continents
- researchers, practitioners and supporters of community foundations
- from mature fields as well as countries with emerging interest

Introduction to community foundations

The rapid growth of community foundations around the world is well documented, as is their value as a local pool of resources to support community development and to make grants to a range of projects and services.

Community foundations are one important element of the grantmaking field: their focus is on geographic communities and how they can improve the quality of life for all people in a defined area. Unlike most other grantmaking foundations, they build up their resources gradually from many donors. One of their primary purposes is to encourage the generosity of new donors (including local citizens, corporations, governments, and other foundations and nonprofits) and provide services to donors to help them achieve their philanthropic goals.

Community foundations – and their donors – make a long-term commitment to their community. Traditionally this has been through the creation of endowed funds, though new ways of creating permanence are being devised in countries where the banking and other financial systems are fragile or the market not conducive to growth. Alternative long-term investment in property is one solution; creative approaches to sustaining regular sources of income another, for example through regular giving by thousands of people (Pondong Batangan, Philippines) or a trading activity which produces a stream of income (The Beautiful Foundation, Korea).

Community foundation grantmaking is based on detailed knowledge of their communities, and expertise in addressing a wide variety of emerging and changing needs. Many community foundations link their grantmaking to social justice (an approach discussed extensively at the Symposium). Even where this language is not used, their commitment is to the whole community, including minorities of all kinds, and to informing donors about root causes and strategic approaches to tackling issues.

The independent boards and committees of community foundations are made up of citizens broadly reflective of the communities they serve; they see themselves as accountable to the community, informing the general public about their purposes, activities and financial status on a regular basis.

External funding has been vital in many places to support community foundation development while local donors learn about the concept. In the UK, for example, the Charles Stewart Mott Foundation enabled the first community foundations to become established. Such enlightened donors have helped the concept take root in many places, though each community foundation's goal is to achieve sustainability through the contributions of donors closely connected with its geographic area.

Community foundations can take many years to become fully viable. In countries as varied as Mexico and Russia, emerging community foundations are fulfilling diverse roles in their communities even though their grantmaking may still be quite small. In-country support organisations (national grantmaker associations, development agencies, other foundations) are helping development, by offering information, training, seed funding and other resources, and communicating the concept to opinion-formers and potential donors.

Characteristics: community foundations

- serve all those living in a defined geographic community
- provide grants for nonprofit organisations and community-based activity, addressing a wide variety of needs in the community
- provide services that help donors – individuals, families, corporations, other foundations, public bodies – fulfil their vision for the community
- encourage a wide variety of donors to meet local needs
- seek to build a permanent resource for the community (most often through the creation of endowed or permanent funds)
- engage in a broad range of community leadership and partnership activities, serving as catalysts, conveners and facilitators

The globalisation of community foundations

Until the 1980s very few community foundations existed outside North America. Even though community foundation-like organisations can be identified in Europe and Asia from the twelfth century, these were, for the most part, formed around communities defined by a common religion.

Community foundations today are defined by their focus on serving the population in a specific geographic area, rather than serving only one group that is based on citizenship, caste, ethnic identity, class or religion.

One of the difficulties in spreading community foundations globally is that not all countries have words in their languages to describe a community defined by geography alone. It can be hard for the people in a defined geographic area to see that they have common interests and a common future.

In a world where people move around freely, another issue that arises is: What defines our geographic community? Is it only those who live in the area, or can it be those who have a connection to the community and its well-being? While large numbers of people seek economic and personal opportunity away from home, many remain committed to giving back to where they were born and raised.

The first North American community foundations were products of a particular moment in time. They were shaped by concerns for improving communities, especially in cities affected by immigration, poverty and a lack of social support systems.

In the 1980s community foundations tested the waters in Europe when they were introduced into the United Kingdom. The success of community foundations there made international funders and others realise that such foundations could be spread worldwide.¹

As our world becomes increasingly interconnected, it is clear that globalisation is not confined primarily to the economic and environmental spheres. Global issues are having an impact on philanthropy as well. As governments look to citizens to carry more of the burden of providing social services; as people move around the globe seeking a better life; as environmental, economic and social issues in one region have effects well beyond its borders, the need for individuals to come together to address the social and economic needs of their communities is growing. Community foundations provide one of the best mechanisms for harnessing local philanthropic resources and the goodwill of individuals.

Community foundations in the world

In 2004 there were at least 1,175 community foundations in 46 countries. Most of them as yet are in the northern hemisphere, notably in the United States (700), Canada (150), Mexico (19), United Kingdom (64), Germany (84), central Europe (35) and Russia (19). They are beginning to take root in many other countries of Asia-Pacific, Latin America, western Europe and Africa, and several development programmes are offering support.

Source: Community Foundation Global Status Report (2005)

¹ For a more in-depth examination of the global community foundation movement, see the 2005 Community Foundation Global Status Report, www.wingsweb.org/information/publications.cfm

Introduction to the Symposium

This report documents some of the key elements of *Community foundations: Symposium on a global movement*, the first global meeting for people involved in community foundations. Over the last seven or eight years, there have been several gatherings of the national and regional organisations which support community foundation development, mainly under the auspices of WINGS-CF – the specialised constituency of Worldwide Initiatives for Grantmaker Support. Through projects like the Transatlantic Community Foundation Network, smaller groupings of community foundation practitioners have also worked together across national boundaries and proved the worth of cross-cultural exchange.

Community foundations: Symposium on a global movement, however, aimed to be global in its reach and to link individuals across three areas of community foundation involvement: local practitioners (staff and board members), people from support organisations, and scholarly researchers. Convened by WINGS with the collaboration of the International Society for Third-Sector Research (ISTR), the Symposium attracted 162 participants from 33 countries across the three areas of community foundation involvement. In all the planning it was emphasised that this was not a “how-to” conference but one that hoped to dig deep into the meaning and value of community foundations, exploring diverse developments and sharing aspirations for higher achievements.

What was important about the event? It was clear from the outset that there were some very special factors. Participants were carefully selected. For the researchers this was a peer-reviewed process, managed by ISTR. Others had to apply and discuss what they would bring to the Symposium, what they hoped to learn and what commitment they would have to disseminating learning. Members of the Advisory Committee worked hard to ensure fair scrutiny of applications and good choices so that the event would not only have representatives of most countries where community foundations are developing, but that the content would be of a high quality.

Timing was important too. Community foundation development has accelerated in recent years. More people are starting to see community foundations as a good way of raising and holding resources to allow local people to find their own solutions to problems, and to assist community development. These people and organisations are turning to others around the world who have experience of developing community foundations, believing that they may save time and effort, and get positive inspiration from other people’s experience.

The Symposium exceeded expectations. This summary gives a good picture of the exchange of ideas and experience. Professional links were formed which have led to collaboration on development activity, participation in each others’ training events and conferences, answering queries and sharing written material. Insights from the Symposium have informed action in local settings – new ways of encouraging generosity, new tools to measure the potential of geographic areas to sustain community foundations, new ways of looking at rural development. WINGS-CF has many examples, from every part of the world, of these practical outcomes from the Symposium.

International links: South Africa, Kenya, Philippines and Thailand (from left to right: Christine Delpont, Janet Mawiyoo, Oman Jiao, Benjamas Siripatra)



The Symposium also gave people the sense that there really is a global movement. No longer is there one country where the concept began, and other countries following their lead. The scale and longevity of community foundations in the United States are rightly admired, but the concept is no longer seen as the property of any one place – it is now universal and adaptable to a variety of contexts. Growth in the number of community foundations is now mostly outside the US, and some of the debate at the Symposium explored ways of using this to increase interconnections for development. For the present this may focus on donors – encouraging their interest in multiple places and fostering diaspora giving – but participants at the Symposium looked forward to a time when community foundations, cooperating across borders, could tackle social issues together.

There are high hopes that the Symposium will not be a one-off event. Although there are no immediate plans to repeat it, a high proportion of participants urged WINGS to aim to do so, at least every five years. More practical in the short term will be:

- smaller gatherings around specific topics
- exploration of the value of fostering continuing networks around key topics
- advocacy for community foundations in the business world, to governments and to multilateral agencies
- sharing of research briefs and reports
- sharing brief summaries or case studies on aspects of community foundation development and operations
- development of a listserv or other mechanism for queries and exchange of information
- increasing the resources for community foundation development, whether through the new Global Fund for Community Foundations or by identifying new sources of assistance for support organisations.

WINGS-CF will review these ideas and either work directly on their implementation or encourage other partners to do so.

Gaynor Humphreys
Executive Director, WINGS



Elan Garonzik (Mott Foundation) and Margery Daniels (International Society for Third-Sector Research)

Lessons learned

- *Community foundations: Symposium on a global movement*, the first global gathering of community foundation practitioners held in Berlin in December 2004, was both a reflection of and catalyst for the emerging global community foundation movement.
- Community foundations now exist on every inhabited continent; interest in community foundations and community philanthropy is growing as communities look for local solutions to local needs.
- Community foundations are most successful when established and run by local citizens – that is, when local people build community foundations with resources from their own communities. In this way they take ownership of the concept and the organisations they create. (See *Ways to grow*, page 15)
- International funders have played a major role in helping spread the community foundation concept around the world; funders have been most successful when providing grants for infrastructure organisations and for programmes that challenge local citizens to raise money from local sources. Community foundations that have been established by external funders, or have received most of their capital from outside their communities, have found it more difficult to grow. (See *Ways to grow*, page 15)
- Community foundations aim to meet the needs of all those living in a specific geographic area, rather than communities defined by religion, racial or ethnic identity, or other types of affinity. As a result, community foundations seek ways to be inclusive and to bridge local divides, not just through their grantmaking, but also through their staffing and by bringing diverse donors into their foundations. (See *Inclusion*, page 22)
- Even though community foundations are designed to benefit specific geographic areas, the definition of who belongs to a community can be broad. Those who have an interest in supporting a local area may live and work outside their communities, but want to give back to where they were born and raised, or feel a close connection. (See *Diaspora giving*, page 18)
- The mix of donors to community foundations varies. In the US, individual donors predominate; elsewhere corporate wealth, diaspora donors and government funding play a larger role. There may be more convergence, over time, especially as individuals are encouraged to give larger amounts and as community foundations become better known.
- Outside North America, most community foundations are small and in the early stages of their development. Community foundations have been very creative in finding ways to make a difference in their communities with little money. They have been involved in creative grantmaking programmes and as catalysts for change by bringing local people, businesses and governments together to identify problems and find solutions. (See *Community impact/community leadership*, page 30)
- Community foundations play a role in promoting philanthropy by encouraging the generosity of local citizens, governments, and corporations, and by helping to create more supportive environments for philanthropy. (See *Encouraging generosity*, page 26; *Community impact/community leadership*, page 30)
- Face-to-face meetings such as the Berlin Symposium are highly effective in spreading expertise about community foundation development.

Facing global challenges

Three plenary addresses challenged participants to think more broadly about the changing world in which community foundations operate, the role foundations play globally, and the primary focus and roles for community foundations. Together they offered perspectives that ranged from the global to the local.²

The world changing ... the world staying the same

Political commentator and Professor of Economics Solita “Winnie” C. Monsod from the Philippines opened the Symposium by explaining why future planning is essential, when “uncertain” and “unpredictable” are adjectives that go hand in hand with “future”.

Focusing on the future helps us prepare for whatever the future brings. We can identify threats and opportunities and create more options for effective action. We explore what might happen so that we can “better shape what we want to happen”.

This prompts us to ask why community foundations, whose primary mission and focus is local, should think about the future of the world. Professor Monsod proposed two reasons: 1) global events affect even the most isolated corners of the world, and vice versa – the events in one small place may have global repercussions, and 2) the mental process is the same – what we learn about the state of the world, now and in the future, can be applied to our own communities.

The process for thinking about the future involves three key steps:

- Examining **The state of the present – what is**
- Looking at **The state of the future – alternative scenarios**
- **Changing/reshaping/creating the future**

The state of the present – what is

The 2004 United Nations Human Development Report shows improvements over the last 50 years. There has been:

- growth in the world economy and real per capita income
- greater participation by women in formal education and the cash economy
- increased life expectancy, a decrease in child mortality, and slower population growth
- increased access to safe drinking water, food and health care
- increased adult literacy and secondary school enrolment
- increased international cooperation to reduce the threat of disease.

In addition, good news is happening on the political front, in terms of peace and order, and in science and technology.

The bad news is that not all peoples of the world share equally in this process. The overall statistics mask great variations between countries. Many countries have seen per capita income fall, poverty rise, disparities in wealth grow, and unemployment and hunger increase. Just as progress at the international level is unevenly distributed, great disparities can be found within countries. The richest nations all have pockets of poverty: some of the poorest nations have parts that are as affluent as the developed world.

The state of the future – alternative scenarios

What will the future be like? There is an entire spectrum of scenarios for alternative futures, from the most gloomy to the very rosy. The indicators of progress (or decline) point to where there is potential for conflict and disaster. The lack of food, clean water and sanitation increases the risk of disease, migration and conflict. Population is growing fastest in areas that



Plenary speaker
Winnie Monsod,
University of the
Philippines

² The full text of all three plenary addresses can be found on the Symposium website: www.cfsymposium.org

can least afford it. Advances in medicine, science and technology create the potential for individuals with bad intentions to do harm. Our increasingly computerised management systems leave us vulnerable to cyber-terrorism and to transnational organised crime. Global warming and HIV/AIDS can create global catastrophes.

On the other hand, technological optimists see a brighter future. They believe that advances in information and computer technology and in molecular biology and genetics will be able to overcome the challenges facing our world. The “synergies and confluence of nanotechnology, biotechnology, information technology and cognitive science (NBIC)” will create tools that range from biometrics to counterterrorism systems, will restore brain functioning and eyesight, and increase longevity and agricultural productivity. NBIC, they believe, can even overcome the problems caused by depletion of natural resources to ensure sustainable development.

Changing/reshaping/creating the future

A vision for the future is important because it provides a focus for collective activity. Those who participate in articulating the vision and are committed to it will have more incentive to make it happen. Professor Monsod’s vision for the future focused on the values articulated in the United Nations Millennium Declaration, adopted by 189 countries:

- freedom, based on democratic and participatory governance
- equality of rights and opportunities
- solidarity, defined as burden sharing in accordance with principles of equity and social justice
- tolerance
- respect for nature
- shared responsibility.

The Millennium Declaration envisions a world at peace, secure and disarmed, free from poverty and want, and with good governance within each country and internationally, a world which protects the environment and is devoted to democracy, the rule of law and human rights, and where even the poorest nations are brought into the world economy as equal partners.

This new world vision is encapsulated in the eight Millennium Development Goals. Most of the goals have specific, time-bound targets for success. However, the last goal, number eight, does not. This goal seeks to “develop a global partnership for development”. It specifically involves the developed countries and has relevance for community foundations everywhere.

Fitting in: the role of community foundations

There is no doubt that community foundations are needed, because there are poor and marginalised people in all communities. Community foundations can focus on health, education, the needs of women, debt, democracy, the environment and youth, and other issues relevant to their communities.

Professor Monsod summarised her presentation in four sentences:

- 1 The world is constantly changing.
- 2 Progress around the world has been uneven.
- 3 There are an infinite number of “futures”, ranging from the most pessimistic to the most optimistic.
- 4 Getting the future we prefer involves vision, mission, goals, targets and strategies.

Professor Solita “Winnie” C. Monsod is Professor at the School of Economics of the University of the Philippines in Diliman. She has served on many boards and commissions on human development and agricultural policy, both in the Philippines and internationally. She has also held senior posts in the Philippine government. Professor Monsod writes a weekly column for *Business World* and the *Philippine Daily Inquirer*, and is co-host of DEBATE, a weekly TV show on current political and socio-economic issues.

“The changes that are taking place in the world today, and the speed at which they are taking place, is breathtaking – it makes the Industrial Revolution of the 19th century look like a slow boat ride.”

“Community foundations are an expression of collective responsibility for the well-being of all: they enlarge the concept of community itself.”

Philanthropy in the era of globalisation

Tim Brodhead, head of the J.W. McConnell Family Foundation in Montreal, asked participants to think about the role of philanthropy in an increasingly integrated world.

Philanthropy is not a new phenomenon. Charity, its older form, has existed as long as humans have had culture. What sets “philanthropy” apart from charity is its emphasis on purpose. Charity is gift in the pure sense, expecting no recognition or reward. Philanthropy is more hardheaded: it is deliberate and expects results.

Community foundations are a relatively new form of philanthropy, but their roots go back a long way. Globalisation is more recent and its impact is beginning to be felt by all. One can debate whether this is good or bad. However, for the present discussion it is enough to recognise that it exists.

The Symposium, which brought participants from around the world to Berlin, is itself an illustration of globalisation. It demonstrates the reality of an international network of grantmaking organisations. In some ways community foundations are similar, reflecting common values, beliefs, structures and ways of working. Yet community foundations also exhibit extraordinary diversity, coming from different countries and cultures with different attitudes toward charity and philanthropy.

Philanthropy

First, Brodhead sought to dispel certain myths about philanthropy:

- 1 Philanthropy is not a replacement for government, even though some of the research and writing on philanthropy emanating from the United States may try to suggest this. The role of organised philanthropy is to do what government cannot: meet particular needs, explore new approaches to solving social problems, channel individual generosity and initiative into improved well-being for all. Philanthropy should complement government, providing “social venture capital” to try new approaches.
- 2 Philanthropy is not a substitute for social justice. The two greatest challenges of our day – the threat to the environment and the persistent gap between rich and poor – cannot be met simply by generous giving. What is needed is something much greater: a generosity of the spirit and a willingness to embrace others who are different from ourselves.
- 3 The final misconception is that philanthropy is essentially about giving money, for what more people have to give is their time. Community foundations expend enormous efforts to raise money, but they must remind themselves constantly that money is just a means to an end. The real end is to build healthy communities and provide leadership and a place for people to meet to identify solutions to common problems.

Globalisation

Globalisation helps us see the world in a different way, by enlarging our concept of community. What affects one, affects all. Communications are breaking down old patterns of money and knowledge flowing primarily in one direction from north to south, and are replacing it with more complex relationships in which creativity, innovations, resources and information flow in all directions.

The opportunities created by globalisation may not all be positive, but globalisation challenges those engaged in philanthropy to see the world through new eyes. And with this realisation comes “a new capacity to *connect*, to *communicate*, and most importantly to *act!*”

Tim Brodhead is President and CEO of the J.W. McConnell Family Foundation based in Montreal, Canada. Earlier in his career he worked in several organisations focused on community development in Africa, and studied the impact of Canadian NGOs on development. He currently sits on the boards of a number of foundations in Canada, and is a member of the Social Science and Humanities Research Council.

The road not yet travelled: a community foundation movement for social justice

Using the words of the American poet Robert Frost, Dr Emmett D. Carson, President and CEO of the Minneapolis Foundation, challenged Symposium participants to “take the road less travelled” in building a global community foundation movement. Instead of following the trend in the United States towards “donor-focused” community foundations, Dr Carson advocated strongly for foundations that are community-focused and devoted to achieving social justice.

He chose the term “movement” deliberately over terms more commonly used in the US, such as “field” or even “industry”, to describe the direction he hoped community foundations everywhere would take. At present, community foundations in the US tend to focus on the mechanics of operating their organisations and not on the “larger purpose of what we want our institutions to achieve within our communities”.

Carson suggested that models for how to create and sustain a community foundation movement based on social justice could be found outside the US. For example:

- Community Foundations of Canada manages a Social Justice Initiative for its members.
- In 2003 Community Foundation Network (UK) focused its national conference on the role of community foundations as social change agents.
- The Community Foundation for Northern Ireland is leading a global network of foundations in conflict societies, Foundations for Peace, devoted to bridging divides, opening dialogues and peace building.

Through grantmaking, community foundations have the capacity to alter fundamentally the power relationships that exist between citizens, and their relationship to government, business and the non-governmental sectors. The relationships between the three sectors represent a delicate set of checks and balances. Through social justice grantmaking, community foundations have the ability to determine the cause of social inequities and correct them at source.

Carson identified four barriers to social justice grantmaking that are especially relevant in the US:

- 1 *The unwillingness to acknowledge power relationships.* Community foundations have power, but they are reluctant to use it for fear of retaliation by the government or business sectors.
- 2 *Foundations owe allegiance to the social systems that created them.* Community foundations may shy away from social justice grantmaking if they perceive that this will make it more difficult to attract wealthy donors from the business sector.
- 3 *The lack of courage to withstand controversy.* Foundations are uncomfortable with controversy and worry about their public reputations. Taking controversial positions or engaging in social justice grantmaking could generate a negative reaction and adversely affect fundraising efforts.



Emmett Carson,
CEO of the Minneapolis Foundation,
plenary speaker

4 *The fear/perception that social justice grantmaking requires significant resources.*

This has not proved to be the case. Convening people to talk about an issue publicly is often enough to begin to influence public opinion, and give the issue a public legitimacy and importance that it was previously lacking. Raising the public profile about social inequities that do exist, however, requires the will and courage to put the foundation's reputation on the line.

Carson conceded that turning community foundations into a global movement based on social justice will not be easy. Community foundations will need to declare that their larger purpose is to be social change agents, and affirm that their "distinctive competence in building civil society" can translate the "abstract concept of the common good into tangible examples". The financial model as well would need to focus primarily on building up unrestricted assets over time for the common good rather than on individual donors' interests. Carson's vision for foundations and NGOs in a democratic society is to balance "the competing interests of government and business in providing social equity for all citizens".

Dr Emmett D. Carson has been President and CEO of the Minneapolis Foundation for over ten years. Previously he was the first programme manager of the Ford Foundation's international and US grantmaking programme on philanthropy and the nonprofit sector. A practitioner-scholar, Dr Carson has published over 75 works on philanthropy and social justice issues and is well known for his seminal research on black philanthropy.

The global spread of community foundations

Community foundations exist or are at early stages of development in the following countries:

The Americas

Anguilla
Brazil
Canada
Ecuador
Jamaica
Mexico
Puerto Rico
St. Lucia, BVI
Tortola, BVI
United States of America
US Virgin Islands

Europe and the Middle East

Belgium
Bosnia and Herzegovina
Bulgaria
Croatia
Czech Republic

Estonia
France
Germany
Ireland
Israel
Italy
Latvia
Lithuania
Netherlands
Poland
Portugal
Russia
Slovak Republic
Ukraine
United Kingdom

Africa

Ghana
Kenya
Mozambique

Uganda
South Africa
Zimbabwe

Asia Pacific

Australia
India
Japan
New Zealand
Philippines
South Korea
Thailand

There are several more countries where the concept is under discussion, for example Albania, China, Egypt, Indonesia, Kazakhstan and Moldova.

Issues for the global community foundation movement

Ways to grow: the Russian experience

In the early 1990s, Russia was a most inhospitable place for community philanthropy to take root. For nearly all of the 70 years of communism, community philanthropy was actively opposed by the regime. Philanthropy was considered a decadent remnant of the tsarist era, and those who dared perform acts of private philanthropy risked punishment, banishment or worse.

Even though most people and funders had little hope for success, the Charities Aid Foundation's Russian office (CAF Russia), led by its director Olga Alexeeva, began to promote the concept of community foundations in 1994. They saw community foundations as a way to instil citizenship, reinvigorate traditions of local giving in Russia, and help communities make the transition from reliance on a centralised state.

Alexeeva was convinced that community foundations could be established in Russia, but it took CAF Russia nearly four years of effort before the Togliatti Community Foundation, the first community foundation, was formed in 1998. In a 1998 article written for *Alliance Magazine*³ Alexeeva described some early lessons from their efforts to establish community foundations in, as she described it, a "country without a community".

- Community foundations cannot be imposed from the top down, but must be formed from the bottom up – from the desires and vision of local leaders who realise the impact community foundations can have on their communities.
- Outside funding – especially from international funders – raised suspicions about who controlled community foundations, and therefore could not be part of early development. Community foundations needed to be built with local money.
- Boards of community foundations had to be balanced to overcome mistrust and avoid control by any one faction. In the beginning this meant that constituencies rather than individuals had to be represented. Board members were drawn in equal measure from the government, corporations and local leaders.
- Trust is the most important community foundation asset. To build trust, all operations of community foundations must be open and transparent, including governance, grantmaking and asset development.

Alexeeva felt it was lucky that CAF Russia at the time did not have the financial resources to help form new community foundations. What they could provide was inspiration and information, explaining how and why community foundations work. CAF Russia initially targeted local businesses for donations, explaining the benefits of giving to community foundations. Companies, as one of the few sources of wealth in local communities, were being inundated by requests for donations. Community foundations would not only make effective grants to organisations, but they would also relieve companies of the burden of dealing with all the individual requests, and eliminate the bad image that could come from disappointing grantseekers.

Based on her early experience with community foundation development, Alexeeva believed that there was an essential difference between community foundations in Europe and the United States. Whereas community foundations in the US were built primarily on gifts from individuals, she saw that in Europe institutional donors – other foundations, corporations and governments – played a greater role in community foundation development. This is now changing as private philanthropy, especially family philanthropy, is growing in importance.

In the Symposium session on Ways to Grow, Alexeeva brought participants up to date on recent developments. Russia now has about 20 community foundations. Although CAF Russia continues to provide technical assistance and support, the movement has developed to the point where community foundations have formed their own association, which holds an annual

³ Alexeeva, Olga. "Community foundations in a country without a community," *Alliance*, vol. 3, no. 2, May 1998, pp. 16-19.

conference and networks to share lessons learned. Not only have community foundations in Russia become established institutions, but major changes are beginning to take place in their structure and operations.

Changes in the Russian donor base

Until 2000 most of the money for community foundations, and for nonprofit activity in general, came from companies. In part this was because corporate giving was more acceptable to the public (companies had been expected to give “voluntarily” under the former regime) and in part because individuals preferred to give through their companies. It was not common for individuals to give, and wealthy individuals feared that they would provoke hostility, or even become targets for extortion or kidnapping. There was no separation between corporate money and private money, and neither corporations nor individuals paid taxes.

More recently personal giving and corporate giving have begun to be separated, in part because Russian business operations have become more transparent so they can compete in the global economy. Wealthy people are becoming more open and pay taxes. Local corporate donors also face a precarious political situation, as exemplified by the very public prosecution of the owners of Yukos Oil. It is acceptable for companies to give to national cultural institutions, such as the Bolshoi Theatre, but if a corporation gives money to support a local NGO promoting human rights, it could find itself in trouble with state authorities. It is now much safer to give as an individual and, as individual giving has come to the fore, it is becoming prestigious to be a philanthropist.

Changes in governance

Just as there has been a move from companies to individual donors, changes are taking place in board structure. Russian society was divided not by classes, but by sectors. The three main sectors were: the state and its bureaucrats; the business sector; and the public. People identified with their sector, seeing themselves as officials, businessmen or, for example, teachers – but not as citizens. The boards of community foundations reflected this reality, based on a one-third principle: one-third representing local government; one-third business people or donors, and one-third respected community leaders who might be drawn from education, the arts or other nonprofit organisations. No single sector was seen as controlling the community foundation. Now, especially in mature foundations, the one-third principle is starting to break down. People are beginning to see themselves as citizens and, as a result, board members are beginning to be selected for their individual qualities, rather than for the sector they represent.

Sustainability

During its formative stage the local supporters of the **Togliatti Community Foundation** brought senior officials of international foundations to Togliatti in hopes that it would lead to international support, but this did not materialise. Forced back on their own local resources, community people pooled their ideas, their proposals and their donations. Within three months they had set up the foundation with no foreign funding.

Today the Togliatti Community Foundation has assets of over €1 million, and is known for its creativity. It has pioneered workplace giving to the community foundation by employees of local factories. Another idea for sustainability, brought back from a visit to the Milton Keynes Foundation in the UK, was to own its own office building, to cut down on expenses, and to earn income by letting office space to other nonprofits. It adds to the foundation’s security because, depending on political currents, local government officials can put an organisation out of business by evicting them from public office space that is rented.

In the 1990s many NGOs in Russia thought that to be sustainable they needed to engage in commercial activities. Alexeeva believes this is a myth – first, because nonprofits cannot compete with the corporate sector, and second, by engaging in commercial activities nonprofits compromise themselves. They are either diverted from their original mission or go bankrupt. Rather than pursuing this route, community foundations in Russia are urged instead to be business-like in their operations and charge fees for their services (eg on donor-advised funds). Russian community foundations have managed grants programmes from donor-advised funds, thereby balancing the interests of donors with community needs. Community foundations have

also provided grantmaking services for international companies. There are different ways to fund community foundation operations, but they should be within the mission of the foundation.

Building civil society

Russian community foundations give well over a half million US dollars in grants each year. The value, however, is not only in the amount of money.

In Russia the nonprofit sector is not well known or understood by most people. Community foundations have played an important role in helping to build civil society at the local level by, for example, supporting the establishment of local groups, such as neighbourhood committees, that become representatives of the public. Community foundations in Russia have also helped improve the quality and effectiveness of nonprofits by teaching them how to write grant proposals, and showing them how to be accountable in their operations and programmes.

Community foundations are the only foundations in Russia that give small grants to local community programmes. Even if nonprofits receive government funding it covers only between 30 to 40 percent of basic operating costs. There is no money for innovation. Community foundations may not be able to fund construction or renovation projects, but they can fund innovative programmes such as arts therapy for disabled children, or after-school programmes or summer camps for young people. These are things that government would never fund, but which make a difference with small amounts of money. Nonprofits can create leverage from these small grants to receive larger grants from other funders.

Lessons learned

- Community foundation structures can be adapted successfully to a wide variety of local environments, even where resources are scarce and local conditions appear to be unfavourable. Every community has resources – both money and people.
- Patience is a virtue. There are no shortcuts to community foundation development and no substitute for the commitment of local leaders.
- Local conditions for philanthropy are not static. They change constantly in response to external and internal forces. Community foundations themselves are helping to create new environments for philanthropy.
- Community foundations do not need to be large to be successful; they should fit the communities they serve.
- The transparency of community foundation operations provides a model for how nonprofits and institutions in society should operate.
- In Russia the keys to community foundation formation are not money but the vision of a number of people in the community; inspired and strong leaders; and donors who understand their role as donors in the community, not as representatives of a sector or a profession.

“Community foundations should not sell vodka and socks.”

“A community foundation ... in eastern Siberia – thousands of miles in each direction nothing – managed to get local funding. So when somebody tells me there is no local money, I don’t believe it.”

Community foundations in the United Kingdom

From a relatively late start in the 1980s and 1990s, the community foundation movement in the United Kingdom has grown to the point where:

- In 2003-04 community foundations made grants of over £52 million to local causes.
- More than 18,500 community groups received a community foundation grant in 2004.
- Since 1992, community foundations have distributed grants worth over £175 million.
- In 2004, 19 foundations gave over £1 million each; two foundations gave over £5 million.

Source: *Annual review 2004*, www.communityfoundations.org.uk

Diaspora giving: a worldwide community

In the opening plenary Professor Monsod discussed the process of globalisation and its consequences: resources are not shared evenly; people move to where economic opportunities are more abundant; and technology brings us closer together across space and time.

Even institutions that are essentially local, like community foundations, are being challenged by forces that are transnational in scope. In a globalised world, how do we define community? Although community foundations focus their efforts in a defined local area, problems in their communities may cross borders, the people they serve may come from many countries, and a large number of local people may have left to go abroad or elsewhere in the country to seek work and the chance of a better life.

Local donors may not be the only ones interested in aiding the community. In areas where local resources are scarce, diaspora donors may be able to provide resources to further the work of community foundations in their hometowns.

Presenters from organisations that work with diaspora donors in the Philippines, the Czech Republic, Scotland, the US and Mexico shared their experiences. They explored diaspora philanthropy as a strategy for raising funds and grantmaking, and whether diaspora giving is more than just the transfer of funds from one country or population to another.

First-generation diaspora: Mexican immigrants in the US

Many Mexicans cross the border to find work in the United States. They send enormous sums of money back to Mexico: remittances in 2003 alone were an estimated US\$13.4 billion. Remittances have become a large part of the Mexican economy and are recognised as such by the government.

Mexican migrants from the same towns and regions in Mexico tend to settle and work near each other in the US. Often they form social clubs known as Home Town Associations (HTAs), to provide mutual support and retain links with their hometowns. One of the ways the HTAs do this is by raising funds for public works projects in Mexico by organising dances and raffles – the traditional ways of raising money in Mexico. This is done on a voluntary basis, and the volunteers often put in 30 hours a week.

As individuals, migrants receive little attention from their national and local governments. As members of the HTAs, which multiply the effect of many small donations, they receive a lot of attention from governments as well as international funders. The HTAs from Zacatecas are especially well organised and have had legislation passed in Mexico so that funds donated by their HTAs are matched by the Mexican national government: for every four dollars sent by the HTAs, the Mexican government adds another dollar.

Currently the HTAs provide support primarily for public works, often making up over half the public works budgets in their hometowns. However, the HTAs could also support broader social programmes if they were convinced of the need. Partnering with local community foundations would be advantageous for both parties. There are between 20 and 25 community foundations in Mexico and their numbers are growing. There is a tremendous opportunity for Mexican community foundations to work with local HTA partnership committees to expand their grantmaking areas and expertise to cover social programmes.

First-generation diaspora: The Philippines

The Ivory Charities Foundation is a community foundation in Butuan in the southern Philippines, where more than half the population lives below the poverty line. It was established in 2000 and has 57 local members. These volunteers donate their time, transport, and money for grantmaking and operating expenses. After forming the foundation the members quickly realised that local resources were too small to have a real impact. They needed to find funding elsewhere.

About ten percent of the population of the Philippines works outside the country, including many in the health professions. Over US\$7.5 billion is sent home in remittances each year, which is approximately 11 percent of the country's gross domestic product. Butuanans abroad feel they still belong to the Butuan community, keeping close ties with family and friends. They have long wanted to help but they had no reliable way to channel their giving – until the foundation provided the means.

Many Butuanans live in southern California. When a Butuan diaspora group heard about the Ivory Charities Foundation, they immediately formed a sister foundation called the Butuan City Charities Foundation of Southern California. The partnership, referred to as “Butuanans helping Butuanans”, has proved very effective because it is based on trust. The founders of the Ivory Charities Foundation are well-known and trusted individuals at home and abroad. By the end of 2004 Butuanans in southern California had donated over US\$29,000 in cash, and almost US\$1 million worth of material, medical supplies and services. The Ivory Charities Foundation has identified four priority areas for funding: rural clinics; the drilling of artesian wells for potable water; a school library; and microlending.

The foundation has been creative in finding ways to fund its projects at low cost. One of the main projects was founding a clinic for neurosurgery and bringing a neurosurgeon to Butuan. The surgery equipment was donated by the sister foundation in the US. The city government provided the clinic. A doctor was attracted to work in this rural area by showing him the possibility of building a private practice, in addition to his work with the poor at the clinic.

The foundation is diligent in keeping its donors informed about how their donations are making a difference in Butuan. When diaspora donors come home, they meet the people who have benefited from their donations and visit the projects they have funded that are helping to improve the quality of life.

Engaging earlier generations of immigrants: Czech Republic

The **VIA Foundation** based in Prague decided it wanted to attract donors from the Czech diaspora in the US for a number of reasons:

- VIA hoped that the example of giving by Czech-American donors would help revive and inspire philanthropic behaviour in the Czech Republic.
- Diaspora giving appeared to have potential, as there had been little effort to renew bonds between Czech-Americans and the Czech Republic in the period after 1989.
- VIA had experience with a Czech-American donor who emigrated before the Second World War and thought that other donors could take advantage of VIA’s knowledge of local charities.
- VIA has a base and good contacts in the US.

The Czech diaspora in the US arrived in several waves beginning in the mid-nineteenth century. The “old immigrants”, from 1848 to the First World War, emigrated primarily for economic reasons and were typically farmers and manual labourers. Between the two World Wars there was a second wave of immigration, which included Czech Jews. After the Second World War, a third wave was composed of educated professionals and elites. Typically, these waves of Czech immigrants do not mix.

As VIA had little experience with diaspora donors, it began by first conducting research on where Czech-Americans live, and on their organisations and their charitable interests, to find out if they would be interested in giving back. VIA found that descendants of the early immigrants to the USA maintained a rich number of associations focused primarily on maintaining Czech-American culture in the US. The newer immigrants were more difficult to identify as they have tended to blend into the larger American culture. After locating potential Czech-American donors, VIA carefully prepared its approach: it set up a fiscal agent and a Friends of VIA organisation in the US, and two US advisory boards. It partnered with the Pittsburgh Foundation (a community foundation) and a private foundation to set up a donor-advised fund to serve as its US base. It held a major event in New York City in 2001 with 500 people. This enormous amount of work proved disappointing, however, yielding only 17 contributions.

Even though all the early work had a meagre return, it was not in vain. When floods in 2002 destroyed a sizeable portion of the cultural heritage of the Czech Republic, the VIA Foundation was in a position to give diaspora donors the opportunity to help save, restore and rebuild the country’s historic buildings and other treasures. Donors could give to an organisation that was trusted and accountable, and could report back to them on the results of their giving. Disaster relief and cultural restoration were causes that motivated Czech diaspora donors.

“Butuanans abroad feel that they still belong to the community of Butuan. The geographic boundaries of Butuan do not limit the community of Butuanans.”

“A Czech-American couple told us, ‘This is what we were looking for – we were looking for somebody in the Czech Republic to help us realise our charitable giving back to the Czech Republic’.”

VIA learned through these efforts that it needed to be persistent and consistent in its approach, and to establish a relationship between donors and the foundation that went beyond a mere thank you note. Diaspora donors, like all donors, want feedback on the good that has been accomplished with their gifts. VIA is now devoting significant resources to its development efforts. It has hired a development staff person and is producing a newsletter to inform donors about the work of the foundation.

Domestic diaspora: Scots in London

Migration is not always international; often people migrate domestically to areas with greater economic opportunity or the possibility of a better quality of life. People from Scotland have a long history of migrating to England and especially London.

The history of the **Scottish Community Foundation** provides a case study of multiple approaches to diaspora giving. When it was formed in 1996, its board decided to raise funds by asking Scots who had emigrated to the US, Canada and Australia to give back to Scotland. It set up an International Friends of Scotland group and made approaches to individuals through the many Scottish societies and clan groups around the world. This approach failed. The donors were for the most part not recent immigrants, the foundation and its founders were unknown, and they had no track record of grantmaking or operations that would make the foundation attractive to diaspora donors. Potential donors wanted to give to an organisation that was operating and could show results, not just an organisation on paper with a business plan. The development effort was under-resourced and inconsistent: board members tried to raise funds themselves while on business trips overseas.

In 1999 the foundation was re-launched as a community foundation based on local giving though initially it was primarily a redistribution mechanism for £2 million of government funds. More recently the foundation has begun to work with individuals from Scotland who are living and working in London. The focus on individual donors has given the Scottish Community Foundation a new start, and led to the Foundation being rebranded in 2004. It has adopted as its slogan “Giving Back to Scotland”. Asset development now focuses on contacts with high net worth individuals in London through their professional advisors; with existing charitable trusts; and in organising the annual Caledonian Challenge.

The foundation is working with a London couple to help set up a fund for Argyle, where they were born and have a family home. Argyle is an area west of Glasgow with a high level of poverty. The foundation commissioned a community report on the needs of Argyle which led the couple to focus their giving on the needs of an ageing population and children in Argyle.

The Caledonian Challenge is a sponsored Highlands walk that draws thousands of walkers each year, primarily from the London area. The Royal Bank of Scotland promotes and sponsors the walk, flies participants to Scotland and doubles their gifts. The Foundation views these walkers as a potential source of future gifts and is working to develop a continuing relationship and convert them into long-term donors. Participants in the Challenge are increasingly choosing to fund projects in Scotland in order to maintain their Scottish roots.

The Scottish Community Foundation has developed a diaspora strategy that works. They have found that:

- Prospects need only to connect with a part of Scotland, not the entire country.
- High net worth individuals are used to paying for services and will pay to have the extra work done to make their giving more effective.
- In order to be successful with diaspora givers, the foundation must know its community well and match donors with areas and projects. It first attracts them with good stories and the ways they can help, and then shows them the tax benefits of giving.

Global philanthropy and the US

Donors are becoming more interested in making grants outside their own communities. In part this is due to the number of donors who maintain ties to their homelands, and in part because of the international nature of issues that donors care about. More and more US community foundations are engaged in international grantmaking from donor-advised funds. In some cases this means that they must change their founding documents in order to be able to make grants outside their community.

The **International Community Foundation** based in San Diego, California was formed specifically to facilitate cross-border giving from residents in the United States to communities across Asia and the Americas, especially in Baja California, the northernmost state of Mexico that borders California. The immigrants who work with the International Community Foundation are for the most part first-generation immigrants who maintain strong connections to their homelands. The Foundation researches giving opportunities for donors and makes the cross-border grants. Donors in return receive the tax advantages of giving through a US public charity, and know that their donations will be going to organisations that are well managed and effective.

The question was raised why the US, rather than other parts of the world, has been the main focus for seeking diaspora giving. The answer for the VIA Foundation was that the US has the most developed philanthropy culture, and that they could start with existing contacts in the US.

For the Ivory Charities Foundation the decision was based on the fact that nearly one-half of the Filipinos working abroad are in the US, many of whom are health professionals who can afford to give back. For Mexico the reality is that 98 percent of Mexicans abroad are living in the US and this is where HTAs have been formed.

The focus for Scotland is currently on Scots living in London. However, the recent transfer of some political power to Scotland and the establishment of the Scottish Parliament has become a new focus for Scots abroad. The Scottish Community Foundation may try in the future to work with donors abroad, even though finding the right balance with UK donors may prove a challenge.

As the number of community foundations grows around the world, the exciting possibility has arisen that donors in one part of the world can make their gifts abroad from community foundation to community foundation. There is some evidence that this is already beginning to happen in California, and in response to natural disasters.

Lessons learned

- Diaspora giving is currently most successful with donors who are first-generation immigrants, who left their homelands primarily for economic reasons and maintain close ties, and who may already be sending remittances back home.
- Immigrant populations, especially those that left their original homelands more than two generations ago, are primarily concerned with maintaining the culture and traditions that sustained them in their new homelands. However, they may be motivated to give back to maintain and restore the cultural heritage in their countries of origin, especially in response to natural disasters.
- Diaspora donors who are looking for ways to give back often do not have a mechanism for giving or knowledge of local nonprofits. Community foundations are trusted and transparent organisations that diaspora donors can use to give back to their home countries, knowing that their gifts will fund the most appropriate and effective nonprofit organisations.



A cross-cultural conversation – Czech Republic, Germany, and USA
(from left to right:
Jirí Bárta, Nina Spallek, Christine Soto)

Inclusion: a tale of two communities

Community foundations serve a defined geographic area and seek to improve the lives of all those who live within their boundaries through the application of local knowledge, local resources and local initiative. One of the values that community foundations hold dear is the importance of being inclusive. Inclusion is not about counting faces to make certain the community foundation is quantitatively representative. It is not merely about grantmaking – having local residents on grantmaking panels to help the foundation decide where grants will have the greatest impact. Inclusive community foundations reflect the community in all their operations – in fundraising, in staffing, and in governance too. Being inclusive involves making hard choices about opening the foundation to power sharing and bringing people together across longstanding divisions.

New Haven, Connecticut: Separated by poverty and class

The Community Foundation for Greater New Haven is based in the southeastern part of Connecticut. The western part of the state, which borders on New York, is home to many wealthy people who commute to and from New York City. Connecticut has one of the highest per capita incomes in the US, but it also has some entrenched pockets of poverty, especially in its cities.

The city of New Haven reflects this pattern. New Haven is home to world-class educational and cultural institutions such as Yale University, the Yale Medical School, and the Yale Center for British Art. The small towns surrounding New Haven are affluent, but outside the central university core the city is home to groups that are not prosperous and have been traditionally excluded: African-Americans, Asian-Americans, and an increasing Latino population, composed of immigrants from Puerto Rico, Mexico and Central America. Over the last ten years New Haven has been increasingly referenced as having one of the broadest gaps between rich and poor in the US.

The Community Foundation for Greater New Haven was established in 1928 in the first phase of US community foundation development. It is organised in trust form, the type of organisational structure common at the time. US community foundations today are more likely to be in corporate form, in which the board takes responsibility for the management of its own resources and for appointing new board members. Trust form foundations, on the other hand, have relationships with trust banks that oversee and manage the money. They typically have appointing authorities – institutions or organisations in the community that are responsible for appointing members of the board of trustees.

In New Haven, the institutions that appoint board members include the mayor, Yale University, the Chamber of Commerce, the Bar Association (composed of members of the legal profession) and the trust banks themselves. The community foundation has responsibility for appointing only a few of the eleven board members.

Community foundations in the US

The community foundation movement was born in the United States, and it is well established there. In the US in 2004:

- Gifts by donors to community foundations reached a total of \$4.2 billion, up from \$3.8 billion in 2003.
- Grants made by the field totalled \$3 billion, up 14% from the 2003 total of \$2.6 billion.
- Net assets increased to \$39.4 billion, up 13% from the previous year's total of \$34.9 billion.

Source: www.columbusfoundation.org

When it surveyed the community, the Community Foundation for Greater New Haven learned that it was not thought of as being representative of the community: the board in particular was not seen as reflecting the community, and the community foundation knew it had very few donors of colour.⁴ Given its reliance on appointing authorities, there was very little the foundation could do to affect the composition of the board, other than to try to persuade the appointing authorities to select a more diverse set of trustees. The community foundation has had some success working with the appointing authorities, as there are now two persons of colour and three women on the eleven-member board.

⁴ In the US the term “of colour” is applied to groups that have a history of being marginalised.

The Community Foundation for Greater New Haven conducted market studies which identified the foundation's key strengths: it was well known in the community, was perceived as a venerable institution, and as having a sense of the community. However, the foundation was not perceived as vital or dynamic, and certainly not inclusive. Next they held focus groups with minority communities to find out what they thought about the foundation. The response was dismal. The foundation was perceived as being remote and exclusive, since most of the interaction with these groups had taken place on the grantmaking side.

Based on their studies, the Community Foundation for Greater New Haven decided to establish its Communities of Color Initiative.

The purpose of the initiative is to engage communities of colour in all aspects of the community foundation, increase their philanthropic opportunities and offer continuous learning. Speakers were brought in to increase understanding of the concept of philanthropy. Many people attended these events, which showed there was real interest.

The community foundation at first sought to engage African-Americans, Asian-Americans and Latinos by getting them to pool their resources to create funds that would benefit their own groups. Giving by communities of colour would focus initially on supporting the nonprofits in their own communities, in order to build capacity and ensure there were strong nonprofits in each community sector.

The community foundation learned that it had to have a different approach for each group. Asians would not participate in group meetings; the foundation had to conduct one-on-one interviews in order to make the relationship work. African-Americans, on the other hand, were happy to meet as a group to discuss issues in front of one another.

Initially, the communities of colour did not trust the community foundation enough to place their funds with the foundation. However, once they understood that they could be engaged with their giving and see its results, they were more receptive.

As part of the Communities of Color Initiative, a subcommittee for each of the three groups was set up within the foundation, and a joint Communities of Color committee was established, composed of representatives of the three subcommittees. The committees help the foundation understand community needs and how it can better serve these constituencies.

"Communities of colour wanted to be invited to the table without having to necessarily put money on the table. Well, I had to give them the bad news. The way you get to the table is really to be engaged on the donor side. And you don't have to be wealthy".

Northern Ireland: Divided by violence and exclusion

There can be no more difficult place to express the values of inclusion than a community divided by a long history of antagonism, injustice and sectarian violence.

The Community Foundation for Northern Ireland, established in 1979 to help bridge the Protestant-Catholic divide, and to support community action in deprived communities, has worked hard to heal the divisions in society. From the very beginning the board and staff have had equal representation of Protestants and Catholics. However, this is not enough to create conditions for peace in Northern Ireland. The community foundation has tried to make every grant a force for reconciliation and inclusion, by creating grantmaking programmes that bring together both sides of the conflict to increase understanding, create networks across the divides, and break down the barriers to peace.

Throughout its existence the Community Foundation for Northern Ireland has seen the rollercoaster of the Peace Process, violence flare up and die away, then flare up again. Helping bring people together to build peace in this environment is a laborious process. All their actions have to be rooted in social justice and human rights. In conflict societies, social injustice is often a cause of conflict, while human rights are often a casualty.

In 1995, one year after the ceasefire, the community foundation, with funding from the European Union, began its peace building programme. The community foundation, as a local funder, sees its role as putting projects in place, supporting people, and creating a space for peace building.

"It wasn't enough to just do things to people or for people – you actually had to do things with people."

The foundation found that most difficult areas to fund are:

- ex-prisoners
- victims of violence
- people living in interface communities, divided by Peace Walls
- reintegrating into society young people who fought in paramilitary organisations
- women

When trying to assess the size of the problem the community foundation turned to the government to find out how many political prisoners there were. The government said it did not know – it did not keep figures. The answer was the same when asked about victims of violence. The community foundation was left on its own to develop ways to bring people together.

The foundation decided to go to all the paramilitary organisations, on both sides of the conflict, and ask each to select two representatives to sit on a joint grantmaking panel to address the needs of all ex-prisoners. Since 1995 this panel has met every two months – even during the break in the ceasefire in 1996-97. Just as, or perhaps more, important than the grantmaking was the business that took place on the side. The panel members kept in touch and cross-checked everything with each other, even during the most difficult times of increased suspicion and conflict.

Peace building after conflict must happen at many levels. There is the political level that takes place at the negotiating table. Also important are the institutions in society: the churches, trade unions, educational institutions, employers, and the community. A community foundation, as a funder, has the ability to work among the various groups and bring them together in different combinations – although this has not always been easy or successful.

There is a need to look at things from the perspective of other people. A Protestant farmer forced off his farm by the Irish Republican Army (IRA) has a different experience from the city father and son shot by security forces. There is no shared understanding. The best the community foundation can do is try to get people to see other points of view – the experiences that have shaped how others react.

The Community Foundation for Northern Ireland has developed the following approach to creating a more just, peaceful and inclusive society:

It's not just about the money. It is more about putting the credibility of the foundation on the line and the fact that the foundation has reserves of social and political capital. Even if community foundations have little or no endowment, as funders they are invariably in a privileged position.

Independence is critical. Community foundations can do things that governments either cannot or will not do, or even do not want community foundations to do. Part of the community foundation's credibility in the Republican areas went back to the 1980s when the government withdrew a funding programme because some of the people involved were community activists whom the government suspected of being IRA members. Yet the community foundation funded them. This small gesture, with a small amount of money, allowed the community foundation to work in those areas after a ceasefire.

Work with grassroots leaders. Emerging from decades of violence has the effect of destabilising individuals psychologically. It is important to help local leaders not only improve their community development skills, but also help them to manage change and alter their own mindsets.

Look to the needs of those most affected by conflict. Working with victims of violence is the most difficult. This is in part because the victims can be politically mobilised and manipulated as a result of their understandable hurt and anger, to oppose deals and compromise.

Give voice to victims and political prisoners. This is very difficult but crucial, because over years of conflict very often their voices are not heard. It is important to create a framework where people can express their suffering.

Create safe spaces. There is a need to create a neutral space where people can meet in societies that are divided not only psychologically but physically. Neutral territory is important for getting people together on an equal basis.

Broker relations between the grassroots and middle range leaders. The community foundation can bring issues, such as the needs of ex-prisoners, to community leaders who can champion and carry the issues and solutions to a higher level.

Keep communications channels open. In divided societies, the power of stereotype and the power of rumour are often difficult to overcome. The community foundation has been able to defuse potentially violent situations by the simple act of setting up a mobile phone network between the loyalists and republicans to check out rumours and speculations.

Do not forget the past. Too often people think they should forget the past, but if the past is not dealt with, it will come back to haunt us all.

Although the situations in New Haven and Northern Ireland could not be more different, the two communities share some of the same concerns about divisions in their societies. In Northern Ireland the longstanding conflict is based on religious difference. In New Haven the divisions are along economic, racial and ethnic lines. It is not easy to bridge the divide in order to create organisations and societies that are more inclusive and just. However, with thoughtful consideration, firm commitment, and a bit of bravery, lasting change can be achieved.

Lessons learned

- To become trusted institutions in their communities, community foundations need to be representative of those communities. They cannot appear to be controlled by only one or two sectors or factions.
- Inclusion is more than just having a token number of members from disadvantaged or excluded groups on grants review committees. Inclusion is about power sharing. If community foundations value inclusion, they seek to have a broad spectrum of the community represented on their own staffs and governing boards – and as donors.
- Being inclusive is not easy. It takes vigilance, hard work and a well thought out strategy for inclusive practices to succeed and be accepted, both within the community foundation and by the community at large.

“True reconciliation is to remember and change.”

John Paul Lederach



Avila Kilmurray, The Community Foundation for Northern Ireland

Foundations for Peace

Working in divided societies poses unique challenges for community foundations. To learn from and share with others facing similar challenges, the Community Foundation for Northern Ireland in 2003 initiated Foundations for Peace, a global network of grantmaking foundations working in areas with a history of, or the potential for, violence. The network focuses on bridging those divides through a commitment to the values of peace building, social justice, human rights and inclusion. Initial funding for the network came from the European Union.

The eight members of Foundations for Peace are working in some of the most divided societies around the globe. In addition to Northern Ireland, the network includes another community foundation, the Greater Rustenburg Community Foundation in South Africa, and other foundations from India, Israel, Nepal, Sri Lanka, and the Balkans.

Encouraging generosity

Encouraging generosity is not just about raising money. It is much broader than that. Generosity encompasses the many ways that community foundations encourage philanthropic behaviour in all sectors and all levels of society.

Generosity is connected to two sets of issues. The first is what motivates donors – the ways that community foundations reach out to donors and connect them to the work that community foundations do. The second is the environment in which philanthropy – generosity – develops. This includes the existing traditions and attitudes toward charity, and the local laws and regulations governing philanthropy.

A series of Symposium sessions explored the ways in which community foundations encourage generosity, what makes philanthropic institutions like community foundations attractive to donors, and how community foundations improve the charitable landscape for giving.

Donor motivation

When community foundations talk about giving, the focus is usually on tactics, activities and strategies for raising funds. Less attention tends to be paid to donor values, philosophy and motivation. Worldwide, donors to community foundations are primarily living donors who make gifts during their lifetimes. These donors are meeting a need, but community foundations must recognise that donors have their own needs which community foundations can help meet. What are some of the issues for donors?

- Donors want to feel that they belong. Community foundations can give them a sense of belonging and a space where they can make decisions and lead together.
- Living donors often want to see, feel and touch what their investments do. One of the roles community foundations play is to create these experiences for donors. Community foundations connect donors to the needs in their communities by showing them what those needs are.
- Community foundations meet donors' needs for results in the community – less hunger, healthy babies, homes for the homeless.
- Being generous also meets individual donors' psychological needs for meaning in life – for something beyond themselves. Community foundations help fulfil the donor's desire for immortality by leaving a legacy that will last forever.
- By focusing on donors' motivations, community foundations have the opportunity to encourage generosity at the same time they meet community needs.

Local philanthropic environments: Mexico

In Mexico, the multi-decade rule of the single-party state monopolised the public sphere. The government could be abusive, but it also struck a bargain with its people, offering to look after their social needs in return for their loyalty. It encouraged people to look to the government to solve their problems, and discouraged the development of an independent civil society and philanthropy. Even though single-party rule came to an end with the election of Vicente Fox in 2000, the legacy of the prior regime has had a lasting impact.

Mexico has comparatively few nonprofit organisations. The government still does not trust civil society. Its population amounts to 100 million, but it has only 5,000 civil society organisations that have been certified by the tax authorities to receive tax-deductible donations.

Mexico has been described as a low-trust culture, and this is substantiated by survey data. In answer to the question “Do you feel most people can be trusted?” only 21 percent answered in the affirmative, which is about half the European average. Giving tends to be small-scale, informal, and personal rather than through nonprofit organisations and philanthropic institutions. People would rather give to beggars on the street than to give through, or work with, organisations that are dealing with the problems of poverty and homelessness.

Nevertheless, community foundations are being established by citizens who choose to take a leadership role and bring about cultural changes that break with the former paradigm – the mindset that help must always come from the state.

In Mexico, the community foundations that have been most successful in encouraging generosity are those with local rather than outside resources. Boards are aware that they are leading by example. They are active, they meet regularly, and they are donors themselves. In this way they demonstrate that generosity is much more than money: it means participation, engagement, ownership, trust and leadership.

Local philanthropic environments: Slovakia

Slovakia has a relatively small population of only 5.5 million people. It recently joined the European Union, but its GDP per capita is only half the EU average. It has a number of socio-economic problems ranging from high unemployment, major regional disparities (mainly between the capital and the rest of Slovakia), and areas and groups affected by persistent poverty, especially the Roma population. In addition, the development of Slovakia has been hampered by its history: a legacy of two world wars, and then communism. However, since 1989 the country has been relatively stable and prosperous, even during the dissolution of Czechoslovakia in 1993.

The development of civil society in Slovakia since 1989 has been shaped by a continuing tension between the civil society sector and the state. The state was a major obstacle to developing civil society for many years, and many people still believe that the government will care for them. The civil society sector is considered meagre, even though it is large when compared to Mexico. Twenty-six thousand different associations have been established since the collapse of communism, which corresponds to one for every 211 citizens (compared to one for every 20,000 in Mexico). This is due in part to the liberal legal framework enacted in the early 1990s in the former state of Czechoslovakia.

People are still adjusting to the radical transformation of society since 1989. Capitalism has increased emphasis on money, and powerful economic elites have emerged out of the privatisation process. Not everyone has benefited from the financial reforms, and there has been a loss of trust in people and institutions.

Given the rapid changes and the growing mistrust, it is difficult for people to believe a community foundation when it says it will be here for the next 100 years, even if its operations are open and transparent.

Despite this legacy, Slovakia was the first country to establish a community foundation in continental Europe after 1989. The community foundation in Banská Bystrica was formed in 1994. Since then the number of community foundations in Slovakia has grown to eleven or twelve, so that 25 percent of the population of Slovakia is now served by a community foundation.

In the overall structure of giving in Slovakia, corporations currently play a larger role than individuals, because they have the highest concentration of wealth. However, surveys report that 50 percent of individuals give to charitable causes. Even though this share has remained constant, the frequency of their giving is rising.

One percent tax law. The national government in Slovakia sought to use the fiscal and legal framework to encourage individual giving by creating the so-called “one percent tax law” in 2003, whereby individuals can earmark one percent of their own taxes to go to a charitable institution. This mechanism was designed to create a new dynamic for giving and lead to a more philanthropic culture.

After several years it is apparent that encouraging philanthropy is not that simple. Fundamentally, the one percent giving is not a gift from an individual, but a gift from the state. It is taken from the tax that is paid, not from an individual’s own pocket. The law does not provide a tax incentive for giving, which has been used successfully in other countries. At the moment the one percent assignment of taxes for charity is providing only six percent of the income of nonprofits.

Other strategies, independent of the government, have been used in Slovakia to encourage local giving and community foundation development. One of these is challenge grants, which have been highly effective not only in Slovakia but in other countries as well.

“Community foundations promote the principle of co-responsibility among political, economic and social actors, and encourage those who have resources – time, talent, and money – to share and invest and learn together ... in resolving their community’s problems.”

Challenge grants

In Slovakia a challenge grant was established to help build the endowments of community foundations. Over a two-year period (2000-02) community foundations were asked to raise one million crowns (about US\$25,000) each to be matched on a one-for-one basis. Several conditions were set on this challenge to encourage generosity. The money had to be raised only from local sources and from diverse donors. In spite of the restrictions, seven community foundations succeeded in raising the funds to meet the challenge.

The overall distribution of donations showed how successful the design of the challenge grant programme was. Donations to meet the challenge came in nearly equal amounts from individuals, corporations, and public funding, with corporations providing slightly more funds than public sources, and public funding slightly more than individual gifts.

Challenge grants can be successful because they provide a clearly defined focus (and timescale) for giving. Donors are highly motivated when they know that their act of giving will be matched and multiplied. Challenge grants also provide a way for communities to come together in a common endeavour to create something enduring and beneficial for all.

Challenge grants were important early on in the UK in helping to boost their community foundation movement. In the 1980s the Charities Aid Foundation and the Charles Stewart Mott Foundation collaborated on a challenge grant competition to help build endowments in three community foundations. It was a 2:1 challenge, which meant that each community foundation needed to raise two-thirds of a million pounds, in order to receive the match of an additional one-third, thereby giving each community foundation £1 million in endowed assets. All three community foundations selected to participate in this challenge programme successfully met their match. It is perhaps no surprise that they are now among the largest, best established and most secure community foundations in the UK.

The UK recently completed a second innovative national challenge grant programme. The Esmée Fairbairn Foundation put up £1 million so that ten community foundations could receive £100,000 each over a three-year period towards their operating costs to increase their capacity for fundraising. The challenge for each foundation was to raise £2 million in new endowed funds. All ten met the challenge, even though a few just barely made it. For the £1 million it committed to the challenge, the Esmée Fairbairn Foundation saw its investment increase by 20 times. Ten communities stretched their giving capacity to reach the challenge goal, and ten community foundations increased their capacity to raise funds and were further strengthened by their efforts.

The few downsides to challenge grants should be noted. In the UK there is no overlap in territory among the community foundations. If there had been, it is possible that UK community foundations might have found themselves in competition for funds from the same group of donors, which would have put a strain on the community foundation movement.

Another concern that arose in the UK was that the Fairbairn challenge grant was an opportunity that community foundations felt they could not miss. This may have led some to apply for the competition when it was not the right time for them. In order to participate in a challenge grant programme a foundation needs to structure its entire organisation to focus on raising a large amount of money within a relatively short period of time.

Corporate giving

Corporations have become major donors to community foundations, especially in areas where individuals are less wealthy and corporations hold more assets. Corporations involved in banking, accounting, heavy manufacturing and the extractive industries (mining, forestry and wood products, oil and gas) – have all been working with and through community foundations in a number of countries.

Partnering with community foundations can be advantageous for corporations. Community foundations:

- provide open and transparent operations that ensure corporate donations are well managed and spent;
- have the grantmaking expertise and the local knowledge of community needs and local nonprofits to be sure that the grants made are highly effective;
- relieve corporations of the need to respond to multiple grants requests;

- put a buffer between corporations and the public in cases where grants may cause controversy;
- have the ability to tailor programmes and grant competitions for corporations to their areas of interest – for example, educational scholarships, sports facilities, programmes for youth;
- help corporations carry out their corporate responsibility agenda in a cost effective manner;
- increase the reputation of corporations in the community; and
- improve employee morale and make corporations more attractive for staff recruitment due to their socially responsible behaviour.

Community foundations have to build relationships with corporations, as with any living donors, based on trust. This may take a long time. To be successful, community foundations must understand the corporations' culture, their ability to give, their language, and their needs.

There is always the question of how much control and influence corporations, municipalities or any living donors may exert over community foundations. In addition to the advantages community foundations offer corporations, they also need to make the case that community foundations must represent the entire community. They cannot be "owned" by one segment or one donor. The relationship must be a true partnership, and the community foundation must be seen to be neutral and above influence.

In the age of globalisation, corporations are less bound to a single place. Mergers have taken many corporations out of the local communities where they originated, and out of the prominent role many of them played in supporting the nonprofit infrastructure in their communities. An advantage community foundations offer national or multinational corporations is the chance to maintain a local presence even though they are no longer based in the areas that originally contributed to their wealth and success.

At the moment a number of the local offices of multinational corporations are working successfully with community foundations. However, the existence of local partnerships has not resulted in this knowledge or experience being spread throughout the multinationals into other areas, regions or countries where they maintain offices. The learning that has come out of the local partnerships between community foundations and corporations in one region should be shared widely with branches of these corporations around the world.

Lessons learned

- Community foundations work in charitable environments shaped by history, traditions and culture that are unique to each country, region and locality.
- Generosity is not just about money. It is about encouraging philanthropic behaviour in all its forms, including gifts of time and talent.
- Community foundations provide a means for donors to connect to their communities and to their giving passions.
- Community foundations are more than just charitable banks for their communities. They help shape the environments in which they operate by:
 - encouraging giving by individuals, corporations, governments and other funders;
 - providing examples of charitable behaviour through their transparent operations and the actions of their board members; and
 - helping to improve the legislative, legal and regulatory underpinnings for philanthropy.
- Community foundations have a variety of proven and effective strategies and techniques with which to encourage generosity, including the provision of donor services and challenge grant competitions.
- Corporations can be advantageous partners for community foundations, especially in areas where individual wealth is not high, although corporations like all major donors must understand that community foundations are for the benefit of the entire community and cannot appear to be unduly influenced by any single donor.

"Challenge grants are a specific, practical method for getting people giving."

Community impact/community leadership

Community foundations are not just about creating a pool of financial capital for their communities. Although an endowment may contribute to the long-term stability of a community foundation, the impact that community foundations have in their communities goes well beyond the size of their financial assets and the amount of grants made.

Growing an endowment takes patience and a long-term view. Most community foundations outside the United States are in the start-up phase and have very few financial resources. A little-appreciated fact is that even in the US the majority of community foundations are small and work with limited amounts of capital. The largest US community foundations are, for the most part, in major metropolitan areas and were established in the early and mid-twentieth century. Their relatively large endowments have resulted from growth over a span of 50 to 90 years.

Fortunately, community foundations have other types of resources besides money that they can draw on to provide leadership. These include: the use of volunteers, the capacity to bring groups together to identify and address local needs, the ability to form partnerships and act as catalysts, and to nurture projects, community groups and nonprofit organisations.

Community foundations play a role in promoting the concept of philanthropy. Philanthropy is more than charitable giving that meets immediate needs: it is concerned with addressing issues strategically, attacking root causes and focusing on the future.

The non-grantmaking functions of community foundations can be just as important, and often more important, than their financial resources. The Symposium explored how community foundations are having an impact on their communities by building social capital, addressing systemic issues, encouraging philanthropy in rural areas and participating in public policy debate and decision making.

Rural philanthropy

Worldwide there is a movement of people from rural areas to cities where greater cultural, social and economic opportunities exist. The United Nations projects that for the first time in human history, the world population will be more urban than rural in the year 2007.⁵

With rural populations in decline, governments have tended to withdraw services and let rural communities fend for themselves, focusing instead on urban areas and urban issues.

Community foundations are a means to help rural areas continue to survive as vibrant communities with distinctive values and traditions.

Rural community foundations can capture and retain local capital, so that financial resources do not depart as ageing populations die off and young people leave. They also can bring new resources into the community.

It is not surprising, given the needs of rural communities, that rural community foundations have tended to adopt a community development focus. In the process they have learned to do a lot with very little money, by maximising their use of human capital.

Tomorrow:Today – A Foundation for Rural Community Development illustrates how creative and effective community foundations can be in rural areas where financial resources are scarce. The foundation is located in Benalla in the state of Victoria in southeastern Australia. The town and district of Benalla have a population of 15,000 spread over a large area.

The foundation was formally launched in 2002 with start-up funding from the Foundation for Regional and Rural Renewal, a partnership between the government of Australia and the Sidney Myer Fund, an Australian philanthropic trust. Tomorrow:Today's mission is to "create a stronger, more resilient and prosperous rural community".

Much of the work that Tomorrow:Today does is not visible. It operates behind the scenes, taking good development ideas and turning them into sustainable programmes.

When the community foundation asked the community for suggestions about projects to support, one teenage mother, who lived on the family farm with her parents, siblings and her

⁵ *World Urbanization Prospects: The 2003 Revision*. Department of Economic and Social Affairs, Population Division, United Nations. New York: 2004.

baby, asked if a young mothers' support group was the sort of thing the foundation had in mind. She felt isolated and thought that there must be other young mothers like herself who would benefit from having the opportunity to meet on a regular basis. The community foundation encouraged her to identify other young mothers and make a proposal.

With a very small amount of money, about AUS\$300, the community foundation found it could support this group for a year to meet on a weekly basis, set up a toy library for their children and undertake other activities. For its part the community foundation began talking with the professionals in the district – the youth workers, the maternal and child health nurses – about providing resources for this group. The local agencies saw the benefits of having a support group for young mothers, and were initially supportive, but later backed off because they felt they were fully committed. It took the community foundation several months of working with these agencies and professionals to get them to adopt this new group as a professional responsibility. The Young Mums Support Group is now successfully up and running and has received funding for a second year to provide swimming lessons for the mothers and their children, and to negotiate with adult education groups about their return to studies and their childcare needs.

Even though the amount of money invested in the group was small, the community foundation's investment of time and effort was substantial. Tomorrow:Today took one person's idea and became the catalyst for creating a cohesive group that now is planning for its future, and no longer needs the foundation's support.

Rural Australians, like many people living in rural areas, tend to be practical and results-oriented. Tomorrow:Today has been successful in raising local funds for grantmaking because donors can see immediately how their gifts are making a difference. The foundation has been less successful in raising funds locally for its operating expenses, as this is less tangible. For the moment it relies on external funding for operating support.

A second challenge, which is common to many community foundations, is to prevent the foundation being taken over by a single faction or those promoting a single issue. Trust, transparent operations and high standards are the keys to community foundation success, but in areas with small populations these attributes are critical. Without credibility no one in a small community will give to the community foundation.

Systemic issues

In a world that is becoming more integrated, there are many hard and pressing issues which may not be confined to one town, city or region. There also are issues within communities that have no short-term solutions and need a strategic focus and creative strategies to be solved effectively.

Systemic issues, whether local or transnational, are often too big for community foundations to tackle on their own. They require partnerships and alliances, bringing together people who have the knowledge and expertise to think strategically about issues and effect meaningful change.

Foundation Boroondara is a relatively new community foundation in the City of Boroondara located in the suburbs of Melbourne, Australia, with a population of about 300,000 people. The foundation is interested in encouraging active citizenship and a spirit of community not only on the part of individuals, but also by the agencies, businesses and others in the community. It goes about this by "studying and responding to issues in the community, promoting effective giving, and raising awareness of social problems within the city". The foundation is not reactive – it does not invite grant applications. It decided from the beginning to find out what the community believes are its greatest issues and concerns and to concentrate on these.

After a series of discussions in the community – public meetings, round tables and the like – the community identified critical issues, the pre-eminent one being social isolation. The community foundation held another series of round tables to identify factors that contributed to this. The community decided it was the lack of public transportation; people were isolated because they had no way of getting out and participating in the life of the community. The next round table discussion focused on transportation issues. Both providers and users of bus services were invited to attend. As it turned out, there were a large number of buses owned by the schools and other agencies in the community that were not being fully

"We have not been able to access international funds, and in the long run it's been good for us. It's helped us to be much more creative and to really listen to our constituents and answer their priorities."

"There are large issues which can be resolved in your local area simply by asking citizens to work in conjunction with the community foundation."

used and could provide transport for older people, mothers with young children and disabled people. One school bus company was happy to have its buses used during the middle of the day when they normally sat idle, sharing them at cost. It also made its call-in system available so that users could call the company and schedule their transport needs. The foundation recruited a local community agency for older people to manage the transport operations and persuaded a large international corporation in their community to provide a middle manager for two days a week for two years to help get the effort off the ground.

As this example shows, many types of resources already exist within communities. With a little creativity and effort, all the pieces can be pulled together. Foundation Boroondara believes its role is to help identify major systemic issues in the community and find ways to address them – not to run programmes themselves.

One of the most important things community foundations can do is to help donors to think about systemic issues and involve them in addressing root causes rather than just symptoms. Donors have areas they are interested in, such as the problems of children and youth, but they often work within a charity paradigm, wanting to fund the organisations and institutions that are dealing with consequences, not with systemic issues themselves.

A powerful programme for educating donors was developed by **The Community Foundation for Boulder County**, Colorado: the foundation asked local judges to come and speak to their donors. The judges in their community are not political and so they often feel they cannot or should not speak out on major community issues. Donors who attended the forum heard how the judges viewed the community – who was coming through the courts, what the obstacles to justice were, and what institutions in the community best helped to rehabilitate people. Both the donors and the foundation staff were shocked by what they heard. Some programmes and ideas they thought were the most productive were not the ones the judges saw as having the greatest impact. The foundation's donors still talk about that forum as being a transformational experience. It caused both the foundation's staff and donors to think about justice issues in a new way, and to fund programmes that reflected their new understanding and outlook.

Community foundations also confront systemic issues that are transnational in scope, such as environmental degradation, immigration and sex trafficking. The challenge for community foundations, given their local mission and focus, is to find ways to deal with issues that extend beyond their borders.

Community foundations have already come together to address a number of regional problems, such as environmental issues in the Great Lakes region and the Gulf of Maine in the United States. The global spread of community foundations provides a platform for greater cooperation on problem solving. Community foundations can now share their local expertise about aspects of a systemic problem, such as how poverty in one area leads to immigration and the exploitation of vulnerable people in other parts of the world.

Social capital

When Symposium participants were asked to list the most pressing issues in their communities, the issue on top of most people's list were the linked topics of low public participation in public life, lack of voice and a lack of space for participation. These issues can all be understood through the concept of social capital.

The definition of social capital is still up for debate, but the attributes identified by Robert Putnam have great resonance for community foundations, in part because of his work with US community foundations to measure social capital in their communities.⁶

Putnam refers to several types of social capital, which in the broadest sense consist of social networks and linkages in society. The types that are directly related to community foundations are bonding social capital and bridging social capital. Simply put, bonding social capital is all the ways in which like-minded people come together in voluntary groups. Bridging social capital consists of linkages that bring these groups together within communities.

⁶ Robert Putnam, *Bowling Alone: The collapse and revival of American community*. Simon & Schuster: 2000. For more on civic engagement research in the US, see the website of the Saguario Seminar, an ongoing initiative of Professor Putnam at the J.F. Kennedy School of Government at Harvard University. www.ksg.harvard.edu/saguario.

Bonding social capital is not necessarily a universal good. In the best sense bonded groups work to improve their own lives, the lives of others and their community. However, bonded groups can also be exclusive and hostile toward individuals and groups that are not like them.

The panellists and Symposium participants explored why social capital is important for community foundations, what community foundations bring to building social capital, and how a concern for increasing social capital can be made an integral part of the work of a community foundation.

In Northern Ireland 90 percent of Unionist Protestants and 95 percent of Catholic nationalists live in what are called single-identity communities – communities composed of only one group. The concept of social capital made a lot of sense to **The Community Foundation for Northern Ireland** because they were working not only within these single-identity communities but also seeking to bridge them to overcome a longstanding history of mistrust, antagonism and violence.

The foundation began by working within the single-identity communities to encourage bonding. They found that there were many self-help groups within the communities, but they also found that there was no guarantee that community activists spoke for the community as a whole. Segments of the community, such as single parents or the unemployed, might have no one to speak for them. In addition they found that the most marginalised communities had not developed effective community structures. The foundation worked to foster new groups for those who had no voice. They helped groups develop confidence and encouraged them to express their hopes, aspirations and fears. They did skills training to get them to articulate their feelings and attitudes. Only after bonding was accomplished could the foundation begin to bridge the two communities.

One way the Community Foundation for Northern Ireland builds and mobilises social capital is to analyse which communities rarely apply for grants. The foundation then goes out and works within communities to develop structured groups that can become recipients of grants, thereby helping communities give their social capital a formal structure.

Measuring social capital can facilitate the bridging process. The Community Foundation for Northern Ireland in its grants assessment asks applicants to profile their community in terms of the number of unemployed, ethnic groups, single-parent families, elderly people and young people, etc. The community foundation can then engage with the management committees of organisations and community activists about why certain people are not included. This dialogue is used to get people and organisations to reflect on the diversity in their community and think of success in terms of bridging.

In order to measure social capital a community foundation needs to know where it is starting from and why. What is the specific stock or supply of social capital that it is trying to increase, and what is the current baseline? Researchers have found that it is possible to map existing community networks and in five years time to do another map to chart how networks in the community have increased and if they are working to a better end.

The **Central Minnesota Community Foundation** of St Cloud, Minnesota, used the Putnam short form survey to measure social capital. They did not want the survey to just sit on a shelf; they wanted to use it to get people talking about how social capital affected their community. The local newspaper was approached about sponsoring the effort, but it decided it wanted to do more with the survey and used the data to write a number of front-page articles about the nature of social capital in their area. The high profile given to social capital raised the issue for many who had not previously thought in those terms.

The newspaper organised dinner clubs for about 80 people new to the community so that they could get to know each other and build connections. Other groups began focusing on what they could do to increase social capital in St Cloud. The legitimacy the community foundation gave to the issue of social capital became a catalyst for increasing social capital.

Social capital can make communities more effective, more vibrant and possibly more creative. However, social capital does not necessarily make a community more just. Bonding social capital by itself can lead to a reinforcement of stereotypes. It must be accompanied by bridging social capital that serves to increase understanding and create a more just society.

“A problem of one dimension in one country is a problem of another dimension in another country.”

“Our community is rapidly changing ... Seventeen percent of our population is new to the area within the last three years so what is happening to connectedness in our community is of great concern.”

Public policy

Community foundations choose to participate in public policy debates because the foundations:

- are affected by how public policy issues are addressed by governments, nonprofits and other funders at the local, regional and national levels;
- have in-depth knowledge and expertise about the root causes of local problems, as well as effective approaches to solving them;
- have an interest in promoting and encouraging philanthropy at local and national levels;
- have a stake in supporting effective philanthropy that is open, transparent and free from corruption and negative influences; and
- are concerned to improve the environment for philanthropy in general through changes in the laws, tax structures and other regulations.

There is no doubt that community foundations should contribute to public policy debates. The main questions are to what extent, and how. A group approach to public policy reform by national associations of community foundations is often effective in countries with many community foundations. However, individual community foundations can also be influential in public policy discussions.

In Kenya the national government became increasingly concerned about the operation of *harambee*, a type of public collection that is based on a traditional mode of giving, which originally was more than just fundraising. It was designed as way to redistribute wealth and provide funds to pay the school fees for poor children, for famine relief, and for services in poor communities. Very little oversight of these collections existed and there were complaints of corruption, extortion, using the money for political purposes and other abuses.

The **Kenya Community Development Foundation (KCDF)**, a national community foundation, had been concerned for some time about the need for new legislation governing philanthropy, and was looking for a way to influence government.

When the government set up the “Kenyan Task Force on Public Collections or Harambee”, it asked the Kenya Community Development Foundation to participate. This was significant because KCDF was the only public foundation in the country known to be promoting the institutionalisation of philanthropy and endowments, and transparency and accountability.



Monica Mutuku, Kenya Community Development Foundation

The Kenyan task force was an example of a combined public policy effort, drawing on the perspectives of society, government and academia. It was asked to research the origins, relevance and impact of harambees in Kenyan society and also the extent and nature of corruption, extortion and other abuses of harambee, to make policy and legislative proposals to prevent abuses. They were also asked to review the Public Collections Act with a view to institutionalising philanthropy, charities and endowment funds in Kenya.

The task force held public hearings around the country to hear from the public firsthand, because the abuses of harambee were of great public concern. The task force then developed broad recommendations for policy reform in Kenya at the national level. The major recommendations included: legislation requiring audits of all proceeds from public collections; review and harmonisation of statutes dealing with public collections and the de-linking of political campaigns from philanthropic activities; new regulations and policy on philanthropic institutions and the provision of tax incentives for donations by corporations and individuals.

KCDF is knowledgeable about philanthropy issues and saw the need for reforms and enabling legislation. When the government decided that reforms needed to be made, the foundation was an obvious choice to advise them. It was prepared and poised to play a major role in helping to identify the problems, shape the discussions, and formulate solutions.

Not all community foundations will have the opportunity to shape public policy on a national level, but their knowledge about philanthropy and local needs puts them in a position to inform the public policy debate. They can start discussions around public policy issues and raise their profile among the public, with other funders, and with government authorities.

Lessons learned

- Community foundations have many types of assets besides finance at their disposal to provide community leadership and have community impact.
- They provide opportunities for individuals, groups, and organisations to get more involved in the lives of their communities.
- They create partnerships that bridge divides and bring communities together.
- They act as catalysts for new ideas.
- They link communities and their issues with governments and policy makers to bring about meaningful change.

Information sources for community foundation development

- Worldwide Initiatives for Grantmaker Support: www.wingsweb.org
- Community foundation Symposium: www.cfsymposium.org
- Transatlantic Community Foundation Network: www.tcfnet.org
- Individual web addresses of support organisations can be found at www.wingsweb.org/network/profiles.cfm
- Publications
 - *Community Foundation Global Status Report (2005)*
 - *International Connections: resources that support the growth and development of community foundations globally (2005)*

(available at www.wingsweb.org/information/publications.cfm)

Going forward: the future of the global community foundation movement

This report focuses on just a fraction of the rich experiences shared at *Community foundations: Symposium on a global movement*.

The Symposium added to our body of knowledge about the many ways that community foundations everywhere are adapting traditional forms of charity and community foundation structures to empower local communities. It provided examples of how community foundations are taking a lead in helping to shape the future for their areas.

Community foundations are encouraging generosity in parts of the world that have a long tradition of philanthropy and in parts of the world that until very recently were opposed to charitable acts of any kind.

Community foundations cannot replace governments in meeting basic social and economic needs, but they can provide the venture capital to fund new and innovative approaches to making communities more vibrant and be active players in addressing issues of social and economic development.

Their expertise in philanthropy and community needs make community foundations vital resources for strengthening the enabling environment for philanthropy and for formulating public policy in order to address systemic issues.

Community foundations are connecting across borders to learn from one another. In doing so they are speeding up the formation of new community foundations and expanding civil society and the social capital within communities.

Community foundations have the potential to become a seamless global network that can identify and find solutions for problems that cross borders. In an increasingly integrated world, they are able to facilitate cross-border giving by donors who wish to give outside their communities. Community foundations can be the experts on community needs not only for local donors, but for donors from outside, whether they are diaspora donors or those wishing to give in times of disaster or overwhelming need.

Symposium participants were energised by meeting their peers and by what they learned, and keen to develop more global opportunities for interaction and sharing.

The Symposium organisers are planning the next steps for the global community foundation movement. With input from Symposium participants, the organisers are exploring how to link community foundations to maximise their impact on global civil society. The Symposium was a major milestone for the global community foundation movement, which will lead to increased connections in the near future.

Appendix I: Symposium programme and presenters

Time	Title, Presenter(s)	Session Description
15:00-15:20	<p>Welcoming remarks</p> <p>Monica Patten, Chair, Symposium Advisory Committee Karin Schubert, Berlin Mayor's Office Nikolaus Turner, German Community Foundations Affinity Group</p>	
15:20-16:20	<p>A world changing ... a world staying the same Opening plenary Prof. Solita "Winnie" C. Monsod, University of the Philippines</p>	<p>Professor Monsod will open the Symposium by exploring global trends that will affect community foundations now and into the future. She will describe economic and societal forces that are already shaping our work, and help us understand what they mean for our ongoing work.</p>
Concurrent sessions:		
16:45-18:30	<p>Ways to grow: The real story of community foundation development Moderator: Elan Garonzik, Mott Foundation Panellists: Olga Alekseeva, CAF-Russia Max Legodi, Southern African Grantmakers' Association Nikolaus Turner, German CF Affinity Group</p>	<p>Community foundations are developing in all corners of the world. Increasingly, though, practitioners are learning just what it takes to get them started and keep them going. This session will explore the reality and expectations of growing community foundations to maturity.</p>
	<p>Community foundations and public policy: What's the connection Moderator: Judith Timpany, Whanganui Community Foundation Presenters: Richard Bridge, Parksville-Qualicum Community Foundation Catherine Brown, consultant, Australia Monica Mutuku, Kenya Community Development Foundation</p>	<p>What is public policy? Can and should community foundations participate in public policy debate in order to bring about a legislative and legal environment that is more supportive of philanthropy and a society that is more just? Three leaders will share their experience in public policy development.</p>
	<p>Community foundations: Life cycles of leadership Moderator: Linetta Gilbert, Ford Foundation Presenters: Carrolle Devonish, Anguilla Community Foundation L. Agustin Landa, Lotería Nacional, México Svetlana Pushkareva, Commercial Bank 'Automobile Banking Center' and Togliatti Community Foundation</p>	<p>This session will examine the professional and career paths of community foundation leaders. It will consider how the values of community foundations can be spread throughout the community when community foundation leaders move to other local and regional institutions.</p>
19:30-22:00 Social Event:	<p>Reception at the invitation of Bertelsmann, Klaus Tschira and Körber Foundations</p> <p>Welcoming remarks: Prof. Dr Heribert Meffert, Chairman and CEO, Bertelsmann Foundation Linetta Gilbert, Ford Foundation Elan Garonzik, Mott Foundation</p>	<p>Venue: Bertelsmann Unter den Linden 1 Berlin-Mitte</p>

Time	Title, Presenter(s)	Session Description
9:15-10:30	<p>The role of philanthropy in the global era Plenary Tim Brodhead, President and CEO, The J.W. McConnell Family Foundation Read in Tim's absence by Richard Mulcaster, Vancouver Foundation</p>	<p>Mr Brodhead will explore the role of philanthropy and foundations in the current global environment.</p>
11:00-12:45	<p>Concurrent sessions:</p> <p>Community foundations and the corporate sector Moderator: Richard Mulcaster, Vancouver Foundation Presenters: Svetlana Pushkareva, Commercial Bank 'Automobile Banking Center' and Togliatti Community Foundation Laura Warren, Essex Community Foundation Alma Cota de Yañez, FESAC Fundación del Empresariado Sonorense</p> <p>Researchers look at community foundations Moderator: Prof. Kathleen McCarthy, Center on Philanthropy and Civil Society, CUNY Panellists: Prof. David C. Hammack, Case Western Reserve University Dr Diana Leat, consultant and researcher Rupert Graf Strachwitz, Maecenata Institut</p> <p>Diaspora giving Moderator: Richard Kiy, International Community Foundation Presenters: Jirí Bárta, VIA Foundation Alejandra Cervantes (researcher), Migracion y Desarrollo, A.C. Giles Ruck, Scottish Community Foundation Dr Rene Vargas, Ivory Charities Foundation</p>	<p>This session will explore the relationship between community foundations and the corporate sector, including: power differentials and expectations; developing relationships that can be mutually beneficial; strategies for minimising difficulties; and the ethical issues involved.</p> <p>A panel of researchers on community foundations issues will discuss how they identify and carry out their research topics and what the key topics are for research on community foundations in the future.</p> <p>Can diaspora giving be an effective element in community foundations' development and grantmaking strategies? Is diaspora philanthropy a realistic opportunity for community foundations or an elusive goal? This session will tackle these issues offering and inviting examples from various parts of the world.</p>
14:15-15:45	<p>The role of foundations in conflict societies Plenary Christine Delpont, Greater Rustenburg Community Foundation Avila Kilmurray, Community Foundation for Northern Ireland Barry Knight, Centris (researcher)</p>	<p>The panel will examine how community foundations can play a positive role in crossing the boundaries in conflict societies and work to bring communities together.</p>

Time	Title, Presenter(s)	Session Description	
16:15-18:00	<p>Concurrent sessions:</p> <p>The role of community foundations in addressing systemic problems</p> <p>Moderator: Betsy Martin, Community Foundations of Canada</p> <p>Presenters: Ben Bodna, Foundation Boroondara Marissa Camacho Reyes, Association of Foundations, Philippines Linetta Gilbert, Ford Foundation</p>	<p>Worldwide there are many intractable systemic problems and issues. Although many of these require national, regional and even global attention, there are things that community foundations can do to address systemic problems, such as human rights, challenges of migration, deep and persistent poverty, environmental degradation, and the rights of indigenous peoples.</p>	
	<p>Encouraging generosity Part I: Community traditions of philanthropy</p> <p>Moderator: Christine Forrester, Herefordshire Community Foundation</p> <p>Presenters: Vyacheslav Gudalin, Togliatti Community Foundation Prof. Lusina Ho (researcher), University of Hong Kong Joe Lumarda, California Community Foundation Susan Wilkinson-Maposa (researcher), Univ. of Cape Town</p>		<p>The “Encouraging generosity” session is divided into two parts. Part I will explore how community foundations can build on the local traditions of community philanthropy and connect donors to their giving passions.</p>
	<p>Covering the spaces: Rural philanthropy</p> <p>Moderator: Dr Diana Leat, consultant</p> <p>Presenters: Liz Chapman, Tomorrow:Today Foundation, Australia Leslie Lilly, Foundation for Appalachian Ohio Katarina Minarova, Presov Community Foundation Pushpa Sundar (researcher), Sampradaan – Indian Centre on Philanthropy</p>		<p>What responsibility do community foundations have in rural areas? What are the central issues they face in serving rural areas now and in the future?</p>
9:00-22:00	<p>Special Event: Berlin Mayor’s Office – Town Hall media event and reception</p> <p>Host: Dr Heidi Knake-Werner, Minister of Health, Social Matters and Consumer Protection, Berlin</p> <p>Moderator: Dr Moritz Schuller, Der Tagesspiegel</p> <p>Panellists: Marissa Camacho Reyes, Association of Foundations, Philippines Chris Mkhize, Uthungulu Community Foundation Prof. Dr Christian Pfeiffer, Hannover Community Foundation Alma Cota de Yañez, FESAC Fundación del Empresariado Sonorense Shannon St John, Triangle Community Foundation</p>	<p>A panel of community foundation practitioners, drawn from around the world, will explore the role their community foundations play in helping to improve the communities in which they live, and to promote local philanthropy.</p> <p>Venue: Rotes Rathaus (Berlin City Hall) Rathausstraße 15 Berlin-Mitte</p>	

Time	Title, Presenter(s)	Session Description
9:15- 11:00	<p>Concurrent sessions:</p> <p>Encouraging generosity Part II: Enabling environments Moderator: Christine Forrester, Herefordshire Community Foundation</p> <p>Presenters: Vivian Blair, Vivian Blair & Asociados Hilary Gilbert, Derbyshire Community Foundation Prof. Renee Irvin, University of Oregon Dr Michael Layton, Instituto Tecnológico Autónomo de México (ITAM) Boris Strecansky, Ekopolis Foundation</p>	<p>In Part II of “Encouraging generosity” the role of enabling environments and techniques for increasing community philanthropy will be explored.</p>
	<p>Governance, mutually agreed grantmaking, and policy development Moderator: Dorothy Reynolds, Mott Foundation</p> <p>Presenters: Deborah Acevedo, Fundacion Comunitaria Puebla I.B.P. Richard Frost, Winnipeg Foundation Tony Gilbert, Hertfordshire Community Foundation Maxine B. Moul, Nebraska Community Foundation</p>	<p>This session will focus on the hard work of ensuring that community foundations hear from and speak to all areas of their community. The presenters will touch on ensuring accountability and transparency; providing a place for different community groupings within the foundation; and reconciling competing interests/power dynamics.</p>
	<p>Why inclusion matters Moderator: Marion Webster, Melbourne Community Foundation</p> <p>Presenters: Etha Henry, Community Foundation for Greater New Haven Maureen Molot, Community Foundation of Ottawa Annsilla Nyar, The Centre for Civil Society, University of Natal</p>	<p>This session will focus on issues of diversity and inclusiveness for community foundations. Presenters will discuss issues of language and culture, indigenous traditions of philanthropy, and structures that promote inclusiveness.</p>
11:30-12:30	<p>The Road Not Travelled: a community foundation movement for social justice Plenary Dr Emmett Carson, CEO, Minneapolis Foundation</p>	<p>Dr Carson will inspire and challenge us with his vision of the role community foundations can play in their communities.</p>

Time	Title, Presenter(s)	Session Description
	Concurrent sessions:	
14:00-15:45	<p>Community foundations as builders of social capital Moderator: Natasha Amott, Synergos Presenters: Janet Topolsky, The Aspen Institute Eva Maria Hinterhuber (researcher), Maecenata Institut Avila Kilmurray, Community Foundation for Northern Ireland Chris Mkhize, Uthungulu Community Foundation</p> <p>Community foundations and globalisation Katherine Fulton, The Monitor Institute and Global Business Network Gaynor Humphreys, WINGS Richard Mulcaster, Vancouver Foundation Edith Villanueva, Sugar Industry Foundation</p> <p>More than the sum of the parts: Creating synergies Moderator: Shannon St John, Triangle Community Foundation Presenters: Barbara Oates (researcher), Community Foundations of Canada Vadim Samorodov, CAF-Russia Peter Walkenhorst, Bertelsmann Foundation</p>	<p>What is social capital? What role do community foundations play in building social capital in their communities?</p> <p>“Keynote listeners” covering every session at the Symposium will share what they have heard and challenge their audience to explore how far community foundations are creating their own form of globalisation. Are we building a diverse and innovative “global movement” and has the Symposium given us insights into future development?</p> <p>The number of community foundations globally has risen to 1,120. How do we link our strengths and resources to maximise the impact of the community foundation movement on global civil society? What are the strategies for expanding/ facilitating the flow of: intellectual capital; financial/philanthropic capital and the impact of public policy? This group of experienced community foundation leaders will challenge us to think about these issues as we continue to build what some describe as a global movement.</p>
16:15-17:45	<p>Facing the future Closing plenary Moderator: Monica Patten, Community Foundations of Canada Panellists: Hilary Gilbert, Derbyshire Community Foundation Juraj Mesik, The World Bank Monica Mutuku, Kenya Community Development Foundation Dorothy Reynolds, Mott Foundation</p>	<p>A panel of funders and practitioners will explore the direction they see the field moving in the future. They will send us off with challenges, ideas and inspiration.</p>
20:00-22:00	<p>Social Event: Closing reception and gala dinner at the Reichstag Restaurant Käfer</p>	<p>Venue: Reichstag (Parliament) Building Platz der Republik 1 Berlin-Tiergarten</p>

Appendix II: Symposium Advisory Committee

Monica Patten (Chair)	President and CEO, Community Foundations of Canada AND Chair, Worldwide Initiatives for Grantmaker Support (WINGS)
Martha Carvajal	Board Member, Puebla Community Foundation
Hilary Gilbert	Director, Derbyshire Community Foundation
Peter Hero	President, Community Foundation Silicon Valley AND Board Member, League of California Community Foundations
Norman Joseph Jiao	Executive Director, Association of Foundations – Philippines
Ruth Jones	Visiting Fellow, Community Foundations of Canada
Marcos Kisil	President, Institute for the Development of Social Investment
Jana Kunická	CPI Co-ordinator, European Foundation Centre
Max Legodi	Programme Director, Southern African Grantmakers' Association
Richard Mulcaster	President and CEO, Vancouver Foundation
Monica Mutuku	Director, Kenya Community Development Foundation
Shannon St John	President, Triangle Community Foundation, AND Board Member, North Carolina Association of Community Foundations
Judith Timpany	Chief Executive, Whanganui Community Foundation
Nikolaus Turner	Chairman, Affinity Group “Bürgerstiftungen”, Bundesverband Deutscher Stiftungen AND Member, Board of Trustees, Community Foundation for the Fürstentfeldbruck District
Peter Walkenhorst	Director – Philanthropy and Foundations, Bertelsmann Stiftung
Margery Daniels	Executive Director, International Society for Third-Sector Research
Elan Garonzik	Programme Officer, Charles Stewart Mott Foundation
Linetta Gilbert	Programme Officer, The Ford Foundation
Gaynor Humphreys	Director, Worldwide Initiatives for Grantmaker Support (WINGS)
Kathleen McCarthy	Director, Center on Philanthropy and Civil Society, City University of New York
Eleanor W. Sacks	Consultant to Worldwide Initiatives for Grantmaker Support (WINGS), ex officio

Appendix III: Financial supporters and sponsors

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eventation Veranstaltungen, Public Relations e.K.

Senatskanzlei Berlin (Office of the Berlin Mayor)

The Symposium took place under the patronage of the German President.

Notes

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