Building an International Learning Community

Lessons and Insights from the
Transatlantic Community Foundation Network

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About Community Planning & Research LLC

Community Planning & Research LLC (CPR) is a full-service evaluation, applied research and strategic planning consulting firm dedicated to supporting community-based organizations, charitable foundations and other grantmakers, membership associations and other public benefit entities. The firm was founded in 1996 by Diana Haigwood and Alan Pardini, who remain as principals. CPR is based in Northern California and serves a diverse client base in the United States and internationally.

Executive Summary

This report describes the major lessons learned and insights realized during the creation and development of the Transatlantic Community Foundation Network (TCFN), from 1999 to 2005. The rich and substantial experiences of the TCFN's six-year experiment have been analyzed and summarized, including primary challenges and solutions to those challenges developed over the course of the Network's first six years. Key findings will be of interest to anyone responsible for creating and supporting an international network, but also to those who participate now or in the future.

Major Learnings
Three overarching themes emerged as the most vital lessons the TCFN offers to others who are considering or actively pursuing similar exchanges:

Learning #1: The development of relationships is the most important objective. The most significant and lasting impact of a learning network may be the personal and professional relationships that have been forged. These living relationships are likely to last throughout participants' careers and can be worth more than the "knowledge" exchanged during network meetings.

Learning #2: Linguistic and cultural differences should be leveraged, not overcome. International networks cannot afford to assume that linguistic and cultural issues will resolve themselves. Networks must dedicate resources and actively help participants – especially people who do not have prior international work experience – learn to navigate and benefit from linguistic and cultural differences.

Learning #3: Timing is critical. The Network was unquestionably a catalyst during the internationalization of the community foundation field, but certain elements had to be in place for the project to be viable.

Primary Challenges and Solutions
The report outlines seven concrete suggestions divided into two groups: those relating to the initial creation and launch of a learning network, and those relating to the network's ongoing evolution and sustainability.

Creating the Network:
    A. Set clear goals and expectations.
    B. Choose the right mix of participants.
    C. Assign the right topics.
    D. Keep groups sized appropriately.

Nurturing and Sustaining the Network:
    E. Engage skilled facilitators.
    F. Actively address language and culture.
    G. Conduct concurrent evaluation.

Introduction

This report describes the major lessons learned and insights realized during the creation and development of the Transatlantic Community Foundation Network (TCFN), from 1999 to 2005. The report was commissioned by TCFN's underwriter, the Bertelsmann Foundation, with encouragement from the Network's other major funder, the Charles Stewart Mott Foundation. It was developed by Community Planning & Research LLC (CPR), a U.S.-based strategic consultancy with extensive experience supporting community foundations and learning networks in the U.S. and internationally.

CPR has conducted two extensive evaluations of the TCFN. Those studies provided real-time information to Network management and participants about their efforts, helping to shape ongoing work and inform future planning. As the second phase of the TCFN drew to a close in 2005, however, it became evident there were many insights and learnings emerging as a result of the TCFN's pioneering effort and about which the broader philanthropic community might wish to be informed.

The rich and substantial experiences of the TCFN's six-year experiment have been analyzed and summarized in this report suitable for distribution to a wide audience of funders and practitioners of community-based philanthropy, as well as planners of learning communities and networks. This is not an evaluation of the TCFN, but an overview of major learnings, including primary challenges and solutions to those challenges developed over the course of the Network's first six years. Key findings will be of interest to anyone responsible for creating and supporting an international network, but also to those who participate now or in the future.

About the TCFN

Created in 1999 by the Bertelsmann Foundation of Germany with the support and advice of the C.S. Mott Foundation of the United States, the Transatlantic Community Foundation Network (TCFN) is a learning organization comprised of community foundations and support organizations from Europe and North America. According to its mission, the Network:

> Seeks to facilitate, nurture and encourage the growing interest in the idea of community foundations in Germany and Europe by strengthening communication and interaction with community foundation practitioners in the U.S., Canada and other countries where the concept is well-rooted. The project has the objective to contribute to the growth and advancement of the field. By pursuing strategies that will strengthen and advance the work of community foundations, the network is dedicated to make a lasting contribution to the formation and development of civil society.

Two phases of the Network have been completed: the first between 1999 and 2002, and the second from 2002 to mid-2005. The sponsors have renewed their commitment for a third phase, beginning in late 2005 and continuing into 2008.

The Network is a focused learning community, staffed by the Bertelsmann Foundation. In its first two phases it was guided by an international advisory committee and organized into working groups of between ten and 15 people. The working groups focused on topics central to the missions and operations of community foundations. In the most recent phase of the Network, for example, there were three working groups with the following topics:

- Community Leadership—Nongrantmaking Roles of Community Foundations
- Organizational Development and Effectiveness
- Raising the Visibility of the Community Foundation Concept

The working groups met in person twice annually, for a total of six times during the duration of each three-year phase of Network operations. Each group was tasked with formulating an approach to their topic area with the intent to develop a product that would be of value to community foundations around the globe, and especially emerging community foundations. The groups were given the freedom to determine the precise nature and scope of their products.

The Network has included community foundation representatives from multiple North American and European countries as well as community foundation support organizations. Participants represent the spectrum of community foundation development, from relatively new entities to those with many years of service to their communities. This rich mix of emerging and developed community foundations was intended to create an opportunity for learning and exchange that would inform the work of all participants as well as the community foundation field overall. Working group sessions, annual plenary meetings, internal and external communications, and print and electronic publications represent the principal means of mutual learning and dissemination. All work of the Network has been conducted in English, and proficiency in English was requisite for participation.

Chart 1

Participant Origins

North Americans 43%

Europeans 57%

Chart 2

Languages

Non-Native Speakers 48%

Native Speakers 52%

Chart 3

Development

Established 39%

Emerging 36%

Maturing 25%

TCFN Accomplishments

This report focuses on the major process learnings resulting from the TCFN, but these findings should be considered in the context of what the Network has achieved.

The TCFN's third-party evaluations point to three areas of significant accomplishment:
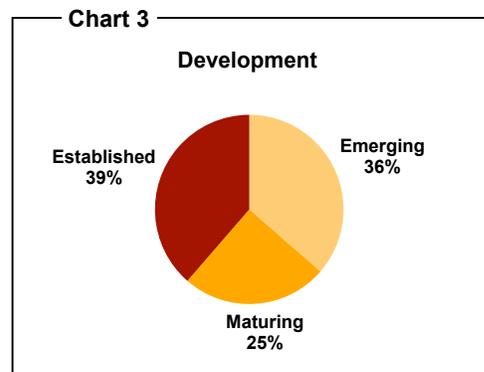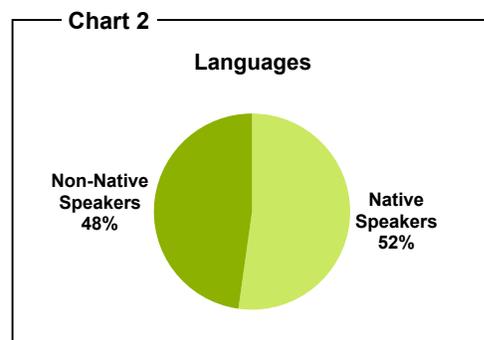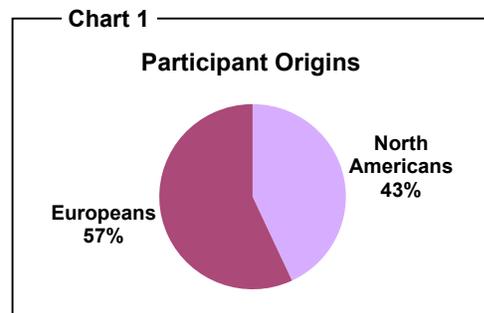
For Network participants the primary outcomes have been the development of valuable, real-world skills and knowledge through shared experiences and best practices, and the creation of strong personal and professional relationships.

Most TCFN members – both those who are newer in their careers or from emerging organizations as well as those who have long tenures at well-established community foundations – describe a wide range of concrete learnings they have been able to apply in their jobs. Close to three-quarters name specific ways they or their organizations have changed their work, ranging from the adoption of policies and procedures (e.g., development of new financial controls or conflict-of-interest policies) to the development of skills (e.g., media relations or board development).

"If TCFN had stopped after the first phase, I don't think there ever would have been a second community foundation in [my country]," argues one European participant. Reports another European participant from a maturing foundation, "[Without TCFN] we would not have developed as fast as we have. We benefit from learning from foundations all over the world, and we've skipped some stages. We're only six years old, but I feel experience-wise we are already 15 years old. The primary reason is we've learned from our peers abroad."

"[For my foundation], the whole idea of transparency really came out of TCFN, and the focus on civil society," according to one Network member from the United States. "That was terminology I heard very infrequently in the community foundation realm . . . TCFN helped put meat on [these ideas]."

> "Everything I learn about community foundations comes from this network."
> —European Participant

> "The TCFN experience has been transformational."
> —North American Participant

Beyond skills and knowledge, however, participants speak of the benefits they have derived as individuals, both personally and in terms of professional development. For many, participation has brought credibility and confidence. Most talk of how the Network has provided access to great thinkers and recognized leaders. Participants from emerging foundations value the exposure to experienced peers, and some speak of having developed mentoring relationships. Participants who are later in their community foundation careers, however, also speak of the importance of continued professional development. Several Network members have begun consulting internationally. Participants from both sides of the Atlantic describe how the TCFN experience has changed the course of their careers.

"We get to meet colleagues in a worldwide setting, and that's invaluable," says a Network member from an established European community foundation. "When you're running an organization it can be isolating, and the board assumes you know everything—yet you're hungry to learn."

Explains another European participant, "For me personally, [TCFN helped me] see a bigger picture of the movement. I have a sense of my future."

The influence of the TCFN extends far beyond the objective, measurable outcomes that foster the development of community foundations. A generation of leaders has had their eyes opened to new ways of thinking, and a network of deeply valuable peer relationships has begun to blossom.

For community foundations the benefits of the TCFN have been numerous. Certainly, organizations whose staff and board members have participated directly in the Network have seen tangible results, some of which were described above. These community foundations benefit from the exchange of effective practices for raising funds, managing investments, administering grants, nurturing staff, developing boards and much more.

Other community foundations have benefited as well. The TCFN has produced a modest but growing series of products, all of which are in English and many of which have been made available in other languages represented in the Network. These products range from white papers on critical topics to tools that are meant to be customized and used in a hands-on way, such as a PowerPoint presentation for promoting community foundations to prospective donors, and an organizational assessment tool that helps organizations with strategic planning.

These free resources can be accessed on the Network's website, maintained by the Bertelsmann Foundation:

http://www.tcfn.efc.be/index.html

For global philanthropy the TCFN has, together with other international initiatives, been a sustaining force at a critical moment: the emergence of a global community foundation movement. With participation of leaders from more than four dozen philanthropic organizations plus involvement of two of the world's leading private foundations, the Network – and by extension the global movement – have built credibility and a clear sense of opportunity and urgency.

Moreover, the TCFN has demonstrated the benefits of network-based collaboration in a global context, specifically as it is used to spread existing philanthropic concepts and, through cross-cultural interaction, to develop new ideas, approaches and practices. The Network has been a pioneering effort to harness the potential of relatively new communications technologies and travel opportunities. The lessons of this experiment – the surprises as well as anticipated outcomes – are offered to the philanthropic community at large.

Report Methodology

This report is drawn largely from research conducted as part of two extensive evaluations of the TCFN, both executed by Community Planning & Research. The evaluation design incorporated both summative (retrospective) and formative (forward-looking) elements, and was organized around sound empirical practices to ensure its accuracy and reliability. It included both qualitative and quantitative components to provide both breadth and depth to the data collection and analysis work.

The systematic collection of qualitative and quantitative data is the basis of empirical evaluation. Simply put, the evaluators attempted to collect meaningful feedback from every TCFN stakeholder: participants, facilitators, Advisory Committee members and staff from the Bertelsmann and Mott foundations. The intent was to ensure not only the consistency of the evaluation data, but its accuracy and reliability as well. The evaluation collected multiple perspectives to ensure that bias was significantly reduced. This is especially important when collecting qualitative, perceptual data.

The evaluation team observed working group and plenary meetings and compiled written evaluations from participants following each meeting. Evaluators also conducted in-depth interviews with nearly all of the five dozen Network stakeholders, including many experienced with other international philanthropic endeavors, such as the German Marshall Transatlantic Fellows Program, the King Baudouin Transatlantic Community Foundation Fellowship, Worldwide Initiatives for Grantmaker Support – Community Foundations (WINGS-CF), and initiatives of the Synergos Institute.

Over the course of the six-year TCFN initiative several significant insights emerged about the nature of building, nurturing and sustaining an international learning network. These insights are the focus of this report. This is not a "how-to" guide to creating a global learning community; the report assumes an understanding of the most basic logistical requirements for a functioning learning community, and instead emphasizes the special qualities and characteristics that have contributed to the success of the TCFN and which are most likely to be generalizable to other, similar networking efforts.

Major Learnings

In terms of strategic and structural learnings – why and how to establish an international learning network – three overarching themes emerged as the most vital lessons the TCFN offers to others who are considering or actively pursuing similar exchanges.

Learning #1: The development of relationships is the most important objective.

When the TCFN was created, there was a clear sense that American and Canadian community foundation professionals had experience and expertise that could be of great value to their emerging counterparts in Europe and Mexico. There was hope, but less confidence, that the exchange of knowledge might travel in other directions. In fact, participants from every type of background had concrete, meaningful learnings. As one participant with a long community foundation career put it,

> The first day of our working group meeting, someone had scheduled visits from local foundations. I thought, 'We have to be polite,' hoping it would be over quickly. And we started to hear what these people were talking about, and I thought, 'Gosh, they are doing some things we've never done in the U.S., and it's brilliant. There are real possibilities.'

Without question, one of the TCFN's original goals – the exchange of knowledge and know-how – was accomplished.

Yet the most significant and lasting impact may turn out to be the personal and professional relationships that have been forged through the TCFN. Network participants have drawn on each other to establish connections between key board members, extending the exchange to other levels of their organizations. Participants have access to peers whenever they need it, simply by e-mailing or picking up the telephone. As one participant explains, "TCFN is for me about people. If we want to launch a new product or program, if we have a specific idea and I want to check out if we're on the right track, I can share it and ask for responses. I get advice – real-world advice."

The Network has created an international community of philanthropy professionals. These are living relationships which are likely to last throughout participants' careers, and which may offer value far greater than the "knowledge" exchanged during TCFN activities. Says Bertelsmann Foundation's Director of Philanthropy and Foundations Peter Walkenhorst, "We believed we would accomplish certain things through the TCFN, but we now see much more clearly a vision for community foundations working together internationally on a variety of things."

Further, the exchange of knowledge itself and the development of the Network's products were driven by interpersonal relationships. The premise of any human network is the exchange of information, which requires trust. Particularly in a context where some participants are intimidated – perhaps because of the challenges of speaking in a foreign tongue, or because they are being confronted with concepts and contexts that differ in significant ways from their own – trust is precious. "Trust is the main resource of the

Network," affirms Walkenhorst. The development of relationships, and in many cases deep friendships, becomes a prerequisite for meaningful exchange.

Thus, TCFN has found the development of relationships to be paramount. The Network is an effort to build social capital, and every activity it undertakes is intended on some level to foster relationships and the growth of trust.

Learning #2: Linguistic and cultural differences should be leveraged, not overcome.

Linguistic and cultural differences inevitably shape the activities of an international network. Many people came to the TCFN in the beginning thinking of language as an obstacle to be overcome. Both times new participants were integrated, cultural differences also began to emerge and create communication difficulties. "The language and cultural barriers would sometimes make [meetings] more like a set of monologues, versus a discussion," notes one member.

Different TCFN working groups approached the issue differently, but the most successful groups embraced and leveraged linguistic and cultural diversity, rather than viewing it as something to be overcome. Whereas some believed these differences were "an inevitable part of working with international groups," others decided the issue warranted active intervention. One working group dedicated an entire day at their second meeting to explore the difficulties – and potential solutions – that had emerged following their first meeting.

Much as a reader who devotes the time can find nuance and meaning in an original that is obscured in translation, TCFN members learned to take extra time to bridge differences in communication styles and abilities. The short-term effect was to slow down dialog, but quickly participants realized they were achieving critical breakthroughs that simply would not have been possible without the full participation of everyone around the table. Language and culture were no longer seen as barriers to understanding, but pathways to insight.

Concrete suggestions for leveraging differences in language and culture are outlined in the section below on "Nurturing and Sustaining the Network," but the major learning here is that international networks cannot afford to assume this issue will resolve itself. Networks must dedicate resources and actively help participants – especially people who do not have prior international work experience – learn to navigate and benefit from linguistic and cultural difference.

Learning #3: Timing is critical.

The TCFN was the work of visionaries who were looking for a way to accelerate community-based philanthropy in corners of the world where the concept of philanthropy – at least as practiced in North America – had not fully taken root. The project's sponsors believed that a peer-based exchange offered great promise, but they knew there was risk involved. "The program could have failed because it was too early," notes Bertelsmann's

Walkenhorst. "Community foundations are local, and we had to ask ourselves, 'How much sense does it make to work on these issues internationally?' When we began our work, it was difficult to anticipate the pace of development."

The Network was unquestionably a catalyst, but certain elements had to be in place for the project to be viable. "This Network came at the right time during the internationalization of the community foundation field," argues Elan Garonzik, vice president for programs at ELMA Philanthropies Services and former Mott Foundation program officer. "The maturity level on both sides of the Atlantic was right. There were maturing community foundations in the U.K., and [Germany's first community foundation in] Gütersloh was already three years old."

Even in retrospect it is difficult to say precisely which elements were fully in place prior to the TCFN's launch and which blossomed precisely because of the resources and focus mobilized by the Network. These elements, however, proved critical:

- The *idea* that was the core reason for the Network's existence – the formation and promotion of community foundations where they had not previously existed – had germinated within each participating country. In some countries this idea was still taking root, but it had been embraced passionately by key leaders, including business leaders and grassroots volunteers. The TCFN did not introduce the concept of community foundations, but convened social entrepreneurs who already were championing that concept.

- Participating organizations, with few exceptions, had dedicated, full-time staff plus serious commitment from volunteer leadership. Although some board members joined as Network participants, the group predominately was comprised of people who were emerging philanthropy professionals who worked full-time as practitioners, building community-based philanthropies.

- The sponsoring foundations had history doing international work and had built informal networks of philanthropy leaders on both sides of the Atlantic, whom they could draw on as advisors. This group, in turn, had connections to emerging, on-the-ground community-based philanthropy initiatives throughout the countries that eventually joined the Network.

- Other international exchange efforts were in development concurrently or soon after TCFN was launched, including the German Marshall Transatlantic Fellows Program, the King Baudouin Transatlantic Community Foundation Fellowship, Worldwide Initiatives for Grantmaker Support – Community Foundations (WINGS-CF), and initiatives of the Synergos Institute. "TCFN was so complementary to other things that were started, like the German Marshall fellowship, which was also transatlantic," notes Garonzik. "There was a critical mass of activity."

Primary Challenges and Solutions

The development of an international learning community presents a number of challenges, both seen and unforeseen. The TCFN was no exception. This section of the report describes the primary challenges faced by Network management and the solutions found to be most effective. The specifics of the TCFN may not translate to other philanthropic learning communities, but the underlying principles are relevant. The challenges and solutions are divided into two groups: those relating to the initial creation and launch of a learning network, and those relating to the network's ongoing evolution and sustainability.

Creating the Network

A. *Set clear goals and expectations.*

One of the most critical requirements of a network's sponsors is clarity of their objectives and of what is expected from participants. In the case of the TCFN, management established parameters for the working process – for example, the expectation that all participants would prepare for and attend all meetings, offer their expertise and knowledge, and actively apply learnings shared by peers. Management also made clear the expectation that each working group would engage in a series of activities culminating in the development of "products, tools, and information that can be disseminated in print or electronic format." (The TCFN's statement of expectations for participants and guidelines for the working groups are included as appendices to this report.)

Aiming for concrete deliverables is useful mostly as a motivating force and an organizing principle around which participants can plan and pursue their work. The goal of a learning network is not product development per se; if that were the goal, there would be more efficient and cost-effective ways of achieving it. The expectation of product is important because it forces a group to create and adhere to a process for their work.

Participants need to have enough clarity to begin engaging with their peers, but this must be balanced with enough freedom to determine how to pursue their work. Too much specificity has the potential to hamper creativity and the organic development of the group and its members. A network's sponsors are trying to create a situation that fosters creative thinking and the development of innovative solutions, and should take care not to be too directive or stifle the autonomy of the working groups.

The extent to which there is clarity or ambiguity of expectation will produce varied reactions in people of different personality types, and also has potential cross-cultural ramifications. Some people are more or less comfortable with ambiguity, just as some will welcome or resist being asked to take responsibility for driving their group toward a final product. This is a normal part of group dynamics. A period during which the

group explores its options, followed by a narrowing and prioritizing of those options, is a natural progression and promotes group bonding and ownership of its own work.

B. *Choose the right mix of participants.*

The raw material of a learning network is people, and the careful selection of participants is crucial. There are great difficulties and benefits derived from groups that combine people from different countries and cultures and whose personal and professional backgrounds are so varied. Ideally, individual participants are intellectually curious, outgoing and hungry for foreign cultural experiences. They must believe they have something to learn – even the most experienced among them – but they also should be willing to share their own expertise.

A mixture of experienced and novice participants is important, and the balance is critical. The TCFN experience suggests that the most successful composition for its working groups has been one that taps a minority (one-third) proportion of highly experienced community foundation professionals – whose opinions and contributions almost inevitably bear greater weight – skewing more heavily (two-thirds) toward participants who are younger in their careers or at least relatively new to the community foundation movement. This ratio promoted productive, highly engaged interaction and exploration from multiple, diverse perspectives; groups with greater numbers of experienced professionals tended to gravitate disproportionately toward the ideas and perspectives of those with more advanced careers.

A further influencer of success has been ensuring that at least half of a group's participants have prior experience working in international settings and in groups with diverse levels of professional experience. "Learning how to work internationally—that's a big part of the work," reports one North American participant. "It was hard, but that's why I liked it. If it was all so easy, it wouldn't be worth very much."

One additional prerequisite is the unqualified support of participants' boards, since the time commitment required for participation in an international network is significant. "Originally we asked for knowledge and sharing," says Walkenhorst, "but I think what we were really asking for was time. The deal was TCFN provided participants with the opportunity to travel and meet peers, but what they had to invest was time. We asked for a considerable amount of time – eight to ten working days per year. For a professional that is a lot. It was not holiday, but working time."

C. *Assign the right topics.*

Again, the challenge to managers of a learning network is to choose topics for exploration that are neither too narrow nor too focused. The TCFN succeeded most with topics that were specific enough that their working groups had common points of reference and a few likely avenues worth pursuing, but broad enough that there was room for true exploration. Topics that are too vague hamper a group's ability to coalesce and move forward.

"Raising community foundation visibility," for example, was a TCFN topic that lent itself to the development of concrete products within relatively defined parameters. Marketing is one specific function from among many that a community foundation must do, whereas another TCFN topic, "organizational development and effectiveness," could have been interpreted to touch every aspect of a foundation, opening many more potential avenues for exploration. One of the most abstract TCFN topics, "leadership," proved to be a challenging issue for its group to define and tackle. At its most basic, definitional level, "leadership" is a term with complicated cultural histories and meanings, making it more difficult for its group to find common reference points from which to begin their inquiry.

D. *Keep groups sized appropriately.*

Basic group dynamics can be influenced to a great extent by something as simple as the size of the group. Because a central objective of a learning network is the formation of relationships, it is critical that working groups are big enough to benefit from an abundance of perspectives and ideas while remaining small enough for the group to develop bonds and for individuals to forge strong working relationships with all of their peers. Most TCFN participants believe it is appropriate to keep working groups to a size of about 12 to 14 people to ensure a critical mass of perspectives while protecting the intimate, relationship-based aspect of the work.

Nurturing and Sustaining the Network

E. *Engage skilled facilitators.*

The success of the learning network is driven largely through skilled facilitation. The TCFN experimented with different structures: some working groups operated under the direction of one of their participants who had been appointed to lead the group, while others had facilitators in addition to group leaders. The most successful groups, by far, were those with dedicated facilitation.

Facilitation allows the groups to move quickly and confidently into their work, reducing the amount of time they spend at the outset determining how to approach their assignments. Facilitation also ensures critical momentum between meetings, solving a notable difficulty experienced by TCFN working groups operating without facilitation.

The TCFN's experience points clearly to the following factors influencing a facilitator's success in an international learning network environment:

- Above all, the facilitator must understand how to leverage linguistic and cultural differences (as described more fully below).

- The facilitator manages not just the flow, but the content, of meetings. It is important he or she have general experience working in the field, e.g. in the case of

the TCFN, the successful facilitator understands the key issues for the community foundation field.

▪ Active listening is one of the most critical skills—the ability to rephrase or refine participant opinions to achieve clarity and ensure people are being understood.

▪ The first meeting for each group is critical. Ideally, the facilitator and group leader create an agenda designed to help the group bond. (Traveling together, e.g., a day trip on a train to a site visit, was cited as an especially effective way to promote group bonding.) The other priorities for the first meeting are achieving clarity of purpose and the creation of "gentle pressure" to motivate the group.

▪ In a learning network context, the successful facilitator is not "neutral" or "passive." He or she must keep the group focused and maintain forward momentum, acting with authority without being controlling or overly directive. The facilitator also is responsible for helping the group agree on a workplan and time line, monitoring the progress of the group toward its product-development goals, and bringing attention to any areas that are falling behind schedule.

F. *Actively address language and culture.*

The capacity to communicate is the most basic building block of a learning community. As described previously, linguistic and cultural differences offer rich opportunities for learning. For many international network participants, however, the first experience will be one of frustration. In one TCFN group, for example, participants expressed concerns via anonymous evaluations: "We are not meeting the needs of the non-English[-speaking] members," suggested one. Another stated, "I'm not convinced we've got everyone's view on the table, i.e., non-English speakers."

TCFN groups grappled with their differences to find solutions. "We tried to balance the American way of meeting and discussing with the European way," explains one participant. "These are very basic things: In Europe you raise your hand and contribute when you think you have something to say, and in America you all join in, it's all debate."

"If we talk about American leaders," says another TCFN participant, "they are more prepared to be expressing ideas clearly and they are more persuasive, and they know how to use the language. Whereas in Europe, we never had public speaking experience in school. Through our work we have some experience, but our style of expressing ideas is not as clear as some Americans'. So our way of expressing ideas was probably hindering what we were trying to express."

Regardless of the reasons for the communication difficulties, it was clear the group was faced with a problem: How do we ensure that everyone is participating to the full extent possible, that we are enjoying the benefit of everyone's best thinking?

The TCFN working groups each came up with their own approaches for leveraging linguistic and cultural differences. The most successful approaches are described here and in an additional appendix to this report, and may be of value to any cross-cultural group looking for ways to work together more effectively:

TCFN Approaches for Leveraging Linguistic and Cultural Differences

- Establish buddy systems—pair native and non-native speakers around the meeting table and encourage one-on-one check-ins to ensure participation

- Identify culturally specific differences in communication styles and ways these differences/stereotypes may interfere with open dialog, for example:

  o North American and, to a lesser extent, U.K. participants repeat statements to signal agreement; continental Europeans may be silent when they agree; don't assume agreement, however, since language barriers may encourage shyness

  o European participants raise their hands; North Americans jump into open debate

- Slow down—native speakers must speak consciously and refrain from using jargon, idiomatic language

- Practice active listening—rephrase or refine statements to ensure they have been understood properly (a good technique for facilitation/participation in any group)

- If appropriate, develop a glossary to highlight specific terms or concepts that have different cross-cultural meanings

- Facilitation reinforces these practices by reminding the group at the beginning of each meeting, monitoring, and intervening when necessary, e.g., polling each participant individually for contributions to a discussion

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G. *Conduct concurrent evaluation.*

Creation of an international learning community is a complex endeavor. For the TCFN, concurrent evaluation provided a real-time mechanism for addressing problems and strengthening work processes. Participants also valued the opportunity to provide confidential feedback to Network management.

"Closer to the end, the group learned to be listening to people whose style of expression was not typical," explains one participant, a non-native speaker. "The issue was raised by the evaluators, and we had a chance to think about it. The evaluation brought to our attention that not everyone was participating and felt their ideas were being heard. And our leader addressed this."

The TCFN's concurrent evaluation offered constructive feedback and highlighted opportunities for strengthening ongoing work following every working group and plenary meeting. The use of third-party researchers gave both management and participants confidence that the evaluation findings were objective and valid.

Conclusion

The complexities of creating and sustaining an international learning community are large, but far outweighed by the potential benefits. Building a multinational learning network is not easy, and it requires a significant commitment of resources over a minimum of several years. Over time, however, the vision can become reality.

We live in a time when e-mail, the internet, inexpensive telecommunications and global transportation make possible the exchange of ideas, approaches and practices in order to expand the reach and effectiveness of philanthropy. Never before have we been able to nurture the global philanthropic movement so directly and so powerfully.

The TCFN has been a pioneering experiment – one which has provided valuable lessons for anyone interested in harnessing the array of knowledge and experience represented in communities near and far, old and new, big and small. This report has summarized the most important of those learnings and is offered to the philanthropic community at large.

Appendices: TCFN Supporting Documentation

Obligations of the Network Members: A Statement of Expectation

The Transatlantic Community Foundation Network (TCFN) is envisioned as a forum of exchange where practitioners benefit from other practitioners. The term "network," in our understanding, therefore means not just an informal circle, but a sophisticated and flexible program management tool designed to develop practical tools and products useful to community foundations on both sides of the Atlantic.

The financial means for the network are provided by the Bertelsmann Foundation and the Charles Stewart Mott Foundation. These resources will help to create an infrastructure which will allow for inspiring and constructive working conditions. To fill this structure with life and creativity, the network depends entirely on its most valuable resource: the know-how of the members and their preparedness to contribute time, talent and energy.

With the application for membership, all members agreed to actively engage in the work of the TCFN. To accomplish this commitment, the members are expected to:

- share their know-how and develop resource materials with the assistance of the other working group members. In turn, they will each have access to the experience and know-how of their fellow-members.

- actively and continuously participate in the working group and plenary sessions. It is on this basis, that the network management is prepared to cover the expenses for communication, travel, and accommodation.

- prepare for and contribute to the proceedings of the working groups. Since the working groups constitute the core of the network, their members shall be prepared ...
    - to take part in a joint evaluating, revisiting and conceptualizing process for resource materials,
    - to help design and co-author new resources,
    - to take over organizational and/or technical tasks for the group.

- try out and implement new ideas and instruments in their own institution or to coach other members of the network in implementing results from the network discussions.

Guidelines for the Working Groups

The Transatlantic Community Foundation Network (TCFN) is envisioned as a forum of exchange where practitioners benefit from other practitioners. At the same time, the program shall contribute to the growth and advancement of the field. For this reason, the objectives of the working groups are twofold: On the one hand, the working groups shall provide their members with opportunities to share know-how and experience and to jointly develop problem-solutions. On the other hand, the working groups are designed to develop practical tools and products useful to community foundations on both sides of the Atlantic.

To achieve these objectives, members of the working groups will pursue a variety of strategies such as:

- exchanging know-how and experience,
- pooling intellectual resources,
- focusing on certain themes and issues,
- evaluating existing literature,
- identifying "good practice,"
- documenting their learning process,
- developing products, tools, and information, that can be disseminated in print or electronic format.

While pursuing these strategies, it is important to keep in mind the following points:

- The list of possible themes and issues suggested by the network management was not meant to be a comprehensive working agenda. The members of the working groups are asked to select a focus for their discussion and concentrate on those issues to which they feel they can contribute the most.

- The products and information should not add to existing libraries, but reflect and recommend what the members of the group have read and valued most.

- They should generally strive to present options rather than dictate practices.

The process:

- identify top priority issues (two or three at most)
- list/collect existing materials/recommendations on them in your practice/institutions or provided by other organizations
- rank them in their practical value for international recommendation/adaptation
- revisit the necessity to develop new materials on "white spots"/issues not yet addressed
- decide on outside expertise to be involved (limited funding)
- formulate/make explicit your own suggestions
- adopt/write how-to-do texts or edit existing materials
- primarily think of web-based products to originate from your working group
- communicate your need for web-based infrastructure to the Bertelsmann Foundation

Toward The Effective Exchange Of Ideas

The following is offered as a reminder to participants in *Community Foundations: Symposium on a Global Movement* in hope that it will help further the effective exchange of ideas. It is excerpted from a paper in progress being developed under the auspices of the Transatlantic Community Foundation Network (TCFN) and based upon the experiences and insights of TCFN working group members.

Challenges & Lessons

Enough Time To Hear, Understand, And Learn
In meetings where English is used, non-native English speakers are frequently so proficient in English that the native English speakers forget their colleagues may be taking time to interpret, process, and formulate a response. So, often, native English speakers, after making a point, continue speaking because they mistakenly assume that the absence of an immediate reply means the non-native English speakers understand, agree, or have nothing to add. How many important ideas are left unspoken?

Meeting Customs Vary
There is no one universal set of business meeting customs. Different cultures have their own preferences on how a meeting should be conducted and how individuals should conduct themselves. One difference is the degree a meeting follows a debating culture. Taking a few minutes to engage meeting participants in determining the ground rules for a meeting facilitates effective communication.

Teaching And Learning Are Mutual
Individuals from countries with a long history of community foundations offer experience, insight, and perspective. As well, individuals with a more recent history of community foundations offer fresh interpretation of old ideas and provocative questions that stimulate new ideas.

Leave Your "VIP" Status Home
Foundation officials attending international meetings are VIPs (Very Important Persons) back home. They have impressive credentials and background. Their opinions are sought and valued. They are used to receiving deference, special attention, and being told that everyone wants to hear what they have to say. Most international meetings simply are not long enough and participants' attention spans wide enough to accommodate a meeting full of VIPs. The time is better spent being sure that every participant is contributing to the success of the meeting.

Terms of Engagement

- Encourage everyone to participate. Is the work important enough to have the benefit of everyone's thinking?
- Speak slowly.
- Take time to reflect.
- Take the time you need and do not to let the agenda push you.
- Spend less time on old stories – make more time to create new stories.

- Ask to repeat.
- Don't hesitate to say, "I am not sure I understand."
- Avoid slang and jargon. Explain terms.
- Repeat and say the same thing different ways.
- Make it a point to learn the terminology of others.
- When ready to make decisions – stop and check with the whole group.
- Acknowledge the effort of others to understand.