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Overview

WINGSForum 2017, WINGS’ flagship event, took place on February 22-24, 2017 in Mexico City at the Hilton Mexico City Reforma. A primary financial, political and cultural center of Latin America, Mexico City was a wonderful backdrop for our global community of philanthropy influencers, ranging from WINGS’ members, network participants, funders, and leaders in philanthropy. This year the event was co-hosted by the Centro Mexicano para la Filantropia, Cemefi. Within Cemefi, a host committee comprised of the Asociación Española de Fundaciones, Asociación de Fundaciones Empresariales (AFE Colombia), and European Foundation Centre formed to fund and promote the event alongside WINGS.

WINGSForum 2017 provided an opportunity for reflection on the state of affairs in our field and on the dynamics of power, money and participation. Given the urgency of global crises and challenges to civil society, we must harness the potential of philanthropy, in all its diversity, for a more inclusive, equitable world. As the only existing conference with a focus on the infrastructure of global philanthropy, we were able to connect and affect change across many issues facing the sector today, such as shrinking space for philanthropy, advocacy, evaluation, data, or cross-sectoral collaboration. The forum set the stage and provided an environment for participants to facilitate, support, and encourage innovative and thoughtful discussions on recognizing the potential to influence social change; challenging current models and practices of philanthropy; and creating the conditions for philanthropy to thrive.

Watch short clip video here.
Participants

WINGSForum 2017 was a tremendous success, bringing together over 300 participants representing 44 countries and over 170 organizations across the globe. These participants represented mostly philanthropy membership associations, foundations, support organizations, academic institutions, among others.

Demonstrating WINGS’ continuing vigor, an instant poll held during the welcoming plenary showed that 76 per cent of those present were attending their first WINGSForum.

Predictably, given the Forum was held in Mexico, the biggest percentage for overall conference attendance came from North America (30 per cent), followed by Latin America and Caribbean (28 per cent), Europe (22 per cent), Sub-Saharan Africa (11 per cent), Asia-Pacific (6 per cent), and MENA Region (3 per cent).
Purpose & Structure

According to this edition theme *Critical Philanthropy: Addressing Complexity, Challenging Ourselves*, WINGSForum 2017 sought to address the following goals:

– **Learn** new and innovative methods to address challenges;
– **Address** challenges facing the philanthropic sector;
– **Network** with other philanthropy leaders, and more.

The program included three Pre-Conference workshops, two Breakfast Sessions, six Plenaries, nine Exhibition Areas and sixteen Concurrent Sessions. The conference was also marked by The Barry Gaberman lecture, WINGS’ Infrastructure Report launch, IMAGine Prize, some meetings such as the Members’ and Funders’ lunches, and Affinity Tables during main lunch.

Through these workshops and sessions, WINGSForum2017 provided an environment for organizations supporting philanthropy infrastructure to collectively explore how to build credibility, partnerships, share learning, and increase our field’s capacity to create the conditions for philanthropic endeavors to thrive and succeed.

A full listing of plenary and concurrent sessions can be found in the enclosed addendum under “program Agenda”. Presentations and materials from some sessions are available on the WINGSForum website at [www.wingsforum.org](http://www.wingsforum.org).

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**Laura Garcia, Semillas**

‘This morning, we had an inspiring conversation on the links between closing spaces for civil society by law and violence against human right defenders.’
Openings

Two dancers in traditional indigenous costume and a drummer took to the stage. Though they were obviously modern Mexicans in traditional costume, you still felt somehow that they were messengers from an ancient world. What would they have to tell a 21st century audience? Maria Chertok of the WINGS board who followed them gave one possible answer: in pre-hispanic Mexican cultures, she said, dance had an important role in forming both individuals and the relations that bound them in communities and she drew a parallel with WINGS’ role: it helps support organizations who are often working alone in their own countries and makes them feel part of a community of practice. ‘It’s not about building walls, it’s about building bridges,’ a remark which was greeted with applause, and became an important refrain throughout the gathering.

‘Infrastructure matters’

Manuel Arango (CEMEFI), who co-hosted the Forum with WINGS, noted that the only certain thing in a time as uncertain as the present is uncertainty itself. How can we make progress against the difficulties that beset us, he asked? Values. To make change, we have to capture human capital through those values. Irrespective of whether you’re in government, business civil society or philanthropy, the key is to ask ourselves about our own values. Jorge Villalobos (CEMEFI) followed up on this theme, saying the Forum offered the opportunity to reaffirm philanthropy’s values which he saw as dignity, solidarity, generosity and inclusion. However, said Maria Chertok, simply restating who we are is not enough. To address changing times, innovation and boldness would be called for. The Forum’s themes of barriers to giving, the creation of an enabling environment for philanthropy and the development of infrastructure are all important. ‘Infrastructure matters,’ she asserted. ‘If you are looking for a hashtag for the conference, that would be mine.’ WINGS has recently developed a framework for infrastructure organizations to assess themselves called the 4Cs (more on this below). She would add a fifth C, critical thinking, nodding to the Forum’s title. We have to challenge ourselves and make philanthropy more effective.
Who was there?

Jenny Hodgson, who acted as master of ceremonies, conducted a quick poll of those attending. The biggest contingent was from North America (33%). Membership organizations and networks, again not surprisingly, were 36% of the group, but they were closely followed by foundations (34%). The most surprising statistic of all, though, was that 76% of those in the room were attending their first WINGSForum, which augured well for the injection of new ideas (and also perhaps signaled the turnover of personnel in the organizations represented). Finally, 61% of the audience interpreted the conference title in its intended double sense – philanthropy has an important part to play, but should look hard at its ability to play it.
Session 1: Philanthropy: Friend of Foe of Social Justice?

‘History makes the radical normal’

If we want philanthropy to be force for change, what are the difficult questions that need to be grappled with? One of them is certainly whether philanthropy serves the cause of justice or whether it simply supports the status quo by drawing the sting of those who oppose it.

Philanthropy means love of humankind, remarked Jenny Hodgson, but it is the product of unequal systems. How could it reconcile this paradox? Laura Garcia of Semillas, a Women’s Fund supporting feminist social movements in Mexico, noted a crucial moment in her early experience of philanthropy, giving cast-off clothing to indigenous communities in Chihuahua. She realised, she said, that this ‘charity-based philanthropy’ was inadequate and could in fact legitimise poverty. Instead, Garcia argued that the issues were ‘systemic’ and required ‘systemic action’. This is especially the case in relation to gender equality, she argued. Mexico is a profoundly unequal country: there is a 30% wage gap between men and women. Indigenous women are not allowed to own land. Semillas funds activists who will change the system. We need to take philanthropy to the next level. Yes, it’s important to relieve poverty, but we need to get more money to social movements. At the moment, local philanthropy in Mexico generally doesn’t fund social justice, often because it’s hard to grasp concretely, so Semillas works by explaining and demonstrating to donors that ‘history makes the radical normal. That’s how movements work.’ Small groups working collectively can bring change and small donors can support that by providing flexible funding for social movements. It’s important, she added, to cultivate a long-term relationship with donors so they can see that change.

‘I loved the opening plenary on whether philanthropy is a friend or foe of social justice. It brought to a very sharp point a question that is critical.’ Jason Franklin, Kellogg Chair in Community Philanthropy, Johnson Center for Philanthropy, Grand Valley State University, USA
Finally, Garcia critiqued the kind of corporate feminism popularised by Facebook executive Sheryl Sandberg stating ‘It’s not about women leaning in, it’s about changing systems and structures’. It’s hard not to see if you live in an unequal society,’ said Ananth Padmanabhan of Azim Premji Philanthropic Initiatives (APPI). In India, you can observe them from cafes where the cost of a coffee is close to the minimum wage. They are a product of both new and traditional injustices, he said, of unequal growth on the one side and the persistence of the effects of the caste system on the other. In addition, India is more like a continent than a country and the Indian state resembles an imperial power where the center imposes its views on the periphery. Philanthropy is evolving as Indian society evolves. It is moving in ‘a social justice direction’, but too much money goes to service provision, very little to what he called resistance, ‘to helping people stand up.’ One of the reasons is that governments are wary of the idea of social justice and are either suspicious of, or hostile to it.

‘Five minutes from midnight’

However, it was Kumi Naidoo of the African Civil Society Initiative who scourged philanthropy most vigorously. It has lost its original meaning, he declared. Originally, philanthropy was not about money, but about how we took care of each other. Civil society in Africa is being damaged by money. It has lost its spirit of volunteerism, he said, and cited again Manuel Arango’s opening remarks about values. There’s too little philanthropy, he said, and too much ‘fool’-anthropy. Can we reasonably expect those who have accumulated capital under the present system to undermine that system? Pay us a better wage, he insisted, don’t use your profits to make palliative grants. He hated the ‘back-slapping’ philanthropy conferences that ignore the unequal basis’ on which philanthropy is predicated, he said, and congratulated WINGS on highlighting it.
NGOs were even more harshly dealt with. While many Africans would recognize the idea of civil society, they would – and often do – reject the role of NGOs. He cited some remarks from a recent youth consultation on NGOs in Africa – ‘NGOs are the ropes that tie Africa to the sinking colonial ships’; ‘NGOs preach drinking water, while drinking wine themselves.’ International funding is double-edged. Its provenance gives governments the excuse to attack them as contrary to the national interest. In the past, US philanthropy had put money into Africa to strengthen African democracy. It was now time, he suggested, for US philanthropy to put money into the US in order to produce the kind of democracy we can all admire. But the biggest threat is climate change. Foundations must recognize that we are running out of time – ‘five minutes from midnight’, from catastrophic, irreversible climate change. There are three things philanthropy must urgently do: recognize it can’t be business as usual, translate ‘intersectionality’ into practical terms[1] and reduce transaction costs to partners (in other words, don’t make too many demands which serve funders’ bureaucracy rather than their ends).

While NGOs can sometimes be unhelpful intermediaries, funders have to use the organizations that are there, argued Ananth Padmanabhan. We can’t cut out the middle, we need leaders to reach the communities. At the same time, we have to recognize that change doesn’t happen because of money, but because of partners’ commitment. We have to resist the temptation to pose as experts and work out the things we are good at and those we aren’t. But, said Laura Garcia, while we always say we aren’t experts, in practice, donors too often want to control how the money is spent. Semillas is beginning to take that into account. One of their donors had asked a group of activists what they proposed to spend her money on. Sanitary towels, they replied. She, the donor was surprised, but gave them the money anyway. That’s an example to be followed, said Garcia.

[1] Intersectionality: the idea that a number of identities intersect to create a whole that is different from the component identities. What’s more, systemic injustice can also be understood to have a multi-dimensional basis, with several forms of oppression combining to create a manifold oppression.

‘It’s been fantastic to speak with heads of associations of various countries because you get a very different perspective when you speak to individual foundations and you get more of a flavour of the national landscape and you can also see the similarities in the trends that are taking place.’ Bharathi Sundaram, UNICEF

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‘Not all from one tribe’

What is WINGS’ role in all this, asked Jenny Hodgson? There is a lot of energy when unusual allies come together, said Ananth Padmanabhan. This is starting to happen in philanthropy and WINGS could help to accelerate the process. Look at those who are in the room – ‘we are not all from one tribe,’ he declared. WINGS can help build trust, said Kumi Naidoo. Echoing the point made by Laura Garcia, he said that, while donors talk about ‘partners’, they don’t treat grantees as equals. WINGS can also encourage its members to recognize that accountability has gone too far and that some perspective on it is needed; that activism and philanthropy are journeys – start small and charitably if you want to, but don’t stop there; and to see how deep inequality has become: ‘we don’t recognize, any of us!’ ‘Affluenza’ is the world’s greatest scourge. He called on the Forum to make affluence, not poverty, history. We are at the crisis of materialism and facing runaway climate change. If we don’t take up that challenge, philanthropy will be complicit, he warned.
In 2016, CIVICUS noted threats to civic freedoms in over 100 countries. What can philanthropy support organizations do to help its constituents combat those threats? What are the main challenges for the creation of an enabling environment, was the question posed by moderator Natalie Ross of the US-based Council on Foundations?

The social justice framing of the Forum is important, said Amitabh Behar (National Foundation for India). Is philanthropy really fighting for change or against it, he wondered. It is really reproducing a capitalist framework? Social movements aren’t like NGOs – they don’t want money, they want solidarity. This conversation should be about advocacy, about redistributing power and giving it to the people who don’t have it. The space for democracy is closing all round – he cited the example of a clampdown on student dissent in India – but people are fighting back, organising themselves and expanding their own spaces, outside of formal organizations. How do we strengthen them? Philanthropy is timid about supporting social movements. It prefers the structure of organizations to the complexity and fluidity of movements.

In Kenya, said Janet Mawiyoo (Kenya Community Development Fund), it is a struggle to get public recognition of what civil society does, especially in disadvantaged communities. Relations between the government and civil society organizations are not good. If you are an NGO in Kenya, you are policed by a ministry.
The result is fewer resources, less capacity and less flexibility. There is what she called a stalemate in attempts to create a new enabling law and an environment where the two sides can talk to, not at, each other. There is pressure on NGOs to be clear about what they do so as not to fall foul of legislation. To confront this, they need to act together, not alone, and one of the challenges is precisely getting NGOs together to present a united front. As philanthropy organizations, we’ve not done all we can in this respect.

**Don’t turn a blind eye to organizations under pressure**

A discussion of the enabling environment really turns into one about the closing space, argued Adam Pickering of CAF UK. Governments know how powerful advocacy can be, fear it and sometimes act to restrict it. He cited the Lobbying Act in the UK which redefines how much advocacy can take place prior to general elections. There is also an idea, he said, that civil society advocacy is anti-democratic, that it is the minority trying to impose its will on the majority. The idea that politics is a pejorative term for civil society is emerging in many places. Civil society *should* be political, he argued, it should be trying to bring change. There is a difference between being political and being partisan, but the two are often conflated. Governments like philanthropy, he said, what they don’t like is civil society and proceeded to cast doubt even on those instances where the space seemed to be opening. In China, on the face of it, things have changed for the better where philanthropy and NGOs are concerned. But while organizations can fundraise openly, it is difficult for international organizations to fund. Governments will tolerate service-providers, he argued, but not rights-based NGOs. We should support those who are under pressure and not pretend we don’t see the negatives for other NGOs.
Ironically, donors sometimes fear having too much impact when it comes to advocacy, argued Eduardo Bohorquez of Transparencia Mexico. He spoke of a campaign two years ago in Mexico to get electoral candidates to disclose their assets. It had been very successful, but the donor withdrew because he said it was verging on electioneering. Another example was the *Tres y Tres* campaign which had succeeded in having anti-corruption laws, co-created with the legislature, passed. Again, a donor had withdrawn because, in their opinion, the campaign had gone too far, it was doing more than lobbying, it was legislating. So too much political success can be a problem for philanthropy. In the face of this, Transparencia Mexico has succeeded in ‘breaking the cognitive dependence path,’ as he put it. It has discovered it can do things without resources from philanthropy institutions by mobilising popular support. Among the advantages are that they are not project-dependent, they don’t have to conform to the funding cycle of a donor.

Other organizations should look to create a new relationship between civil society and government. Taking up Amitabh Behar’s point, he urged the growing importance of what he called ‘organization without organizations’. We should recognize informal movements and connect with them better.
Bringing philanthropy and politics together in difficult times
Given increasingly restrictive circumstances for formal organizations, yet a growing current of action to reaffirm democratic values, how can funders engage citizens? How can we persuade board members, who are often reluctant, to engage in lobbying or human rights work?

If we support work that deals with inequality, argued Amitabh Behar, political work is where philanthropy needs to be. Funders can provide flexible support for organizations working on this. What does this mean in practice? Stand aside and let the grassroots movements do what they do. Don’t ‘suck out human resources’ into the formal NGO world, a tendency that was increasing in some places. Don’t go back to ‘logframe grantmaking’ and invest more in community philanthropy and strengthen its capacity in making change.

Use politics in a more open way, urged Eduardo Bohorquez. Like Adam Pickering, he argued the need to distinguish politics from party politics to overcome board members’ reluctance. There may be fear but we can’t brush issues under the carpet because we are unwilling to offend the authorities. We need to bring philanthropy and politics together because these are difficult times.

Adam Pickering cited the example of the newly-launched Funders’ Initiative for Civil Society whose work might provide a reference point and a repository of practical ideas. He also suggested that funders should respond as politicians would – asking themselves how much support and credibility they have for what they’re doing. Are they helping grantees to gain access to local communities, because ultimately, it is local support which will provide the credibility for what they are doing.

‘There are some words that come to my mind that I’m going to be thinking about – trust, flexibility, shifting the power and humility.’
Session 3: Launch of the WINGS report: *A New Global Picture of Organizations Serving Philanthropy*

*Philanthropy infrastructure organizations have the task of underpinning institutional philanthropy, but their work is relatively unknown. A new report aims to set that right.*

The rationale for the new report, said co-author Pamela Ribeiro of WINGS, is the lack of data on philanthropy infrastructure. It is based on a survey of 63 WINGS members. Boiled down, the report concludes the need to build the capacity of the field and to raise awareness of it. Among the headline findings:
• the most significant factor in the sustainability of an organization is the length of service of the CEO – the longer in post, the more sustainable the organization is likely to be;
• resources for infrastructure are overwhelmingly (80%) concentrated in North America.
• 89% of the sample rely on grants and donations, therefore, there is a need to diversify;
• they are generally under-resourced. 72% see their biggest challenge as funding and financial sustainability, and 65% as staffing
• evaluation is a low priority, ranking ninth out of a list of ten for organizations surveyed.
Larry McGill of the Foundation Center and Barry Knight, co-author of the report with expertise on philanthropy, put some flesh on these bones. There is a great variety in infrastructure organizations, noted Larry McGill, with budgets ranging from USD58,000 to USD42 million. And – giving a less simplified picture than the statistics above supply - while the vast majority see their biggest challenge as financial sustainability, most of them believe that they are sustainable and, though evaluation is low on the list of priorities, 47 per cent of them nevertheless do it.

Barry Knight noted the need to build a stronger infrastructure where it is most needed. North America absorbs 80% of the resources spent on infrastructure, while only one per cent goes to the Middle East and North Africa and 3 per cent to Latin America, results which raised questions for many about whether infrastructure resource are flowing to where they are most needed.

Interestingly, the survey revealed that the ability to create partnerships was seen as one of the great assets of infrastructure organizations. Forty-five out of 63 had five or more partnerships with other WINGS members. The larger ones had more partnerships and, not surprisingly, the best predictor of the number of partnerships is the number of full-time staff.

Advocacy is important for the survey sample. Thirty-five per cent described themselves as very engaged in advocacy and 32% as moderately engaged, though the form and extent of that engagement varies, noted Pamela Ribeiro. Fifty-two per cent are advocating regulation and legal change, 68% are trying to influence public policy, while the advocacy of 73% is confined to knowledge production and dissemination.

‘Sometimes, sitting in a country, you are very isolated and you are not aware of the resources that are out there which might help your work if you could connect to them...I think the value is in the learning and the sharing of ideas.’ Shazia Masood Amjad, Pakistan Centre for Philanthropy
WINGS and DAFNE present the 4Cs

One of the difficulties infrastructure organizations face is how to demonstrate the effects of their work. This interactive session presented a new way of assessing it.

Into this statistical harangue, a light touch was abruptly introduced in the paradoxical form of the Grim Reaper (with a marked Irish accent) who stalked on to the stage amid the mock-consternation of the presenters. What difference does all this make, demanded this figure? Do you have a theory of change? Can you prove your value for money? Ranged against him were four members of the audience who introduced the concept of the four Cs (see above and below), recently developed by WINGS and DAFNE members: capacity, capability, connections and credibility.

**Capacity:** Alina Porumb of the Romanian Association for Community Relations said the Romanian community foundations have given USD4 million to local projects and established giving systems that allow regular, easy donations.

**Capability:** Esther Thompson of the Association of Charitable Foundations in the UK said that ACF has helped devise a UK-wide set of principles for foundation practice which helps UK foundations to justify themselves.

**Connections:** Francis Kiwanga of the Tanzanian Foundation for Civil Society spoke of 20 organizations in Zanzibar who have launched a joint platform to engage with government and which has produced an improvement in the legislative process.

**Credibility:** Naila Farouky said the Arab Foundations Forum has made strides in raising support for philanthropy in the Arab region. It has drawn attention to the need for transparency by itself modelling openness in its practices and to this and other issues through conferences, articles and roundtables. Thus refuted, the Grim Reaper was finally put to rout by the Angel of Evaluation (Barry Knight in a printed T-shirt).
Session 4: Social Problems, Business Solutions: Myth or fact?

Are business approaches the best way to solve some social problems? Should philanthropy be more open to collaboration with business in order to solve those problems? This session examined some of the common conceptions and misconceptions underlying these questions.

Naila Farouky of the Arab Foundations Forum outlined the format for this session: she would set out a series of propositions related to the main theme. The audience would then vote on whether they were true or false, the panellists would give their views and, finally, another vote would be taken to see whether the panellists’ opinion had either confirmed or changed the audience’s original opinion.

The first proposition was that social business is the future of philanthropy. The vote was resoundingly against the idea, with 68% voting it false. All three panellists agreed. Matias Bendersky of the Inter-American Development Bank (IDB) said that while social businesses have a useful role to play (IDB in fact supports social businesses), it’s easier for them to operate in a developed economy where there is access to capital and established regulatory framework. Philanthropy does things social businesses can’t. The proper role of social business should be to complement philanthropy, not replace it. Dominique Lemaistre of the Fondation de France and Edwin Ou of the Skoll Foundation agreed with Matias.
While social business is a powerful tool, said Lemaistre, there are areas such as education and culture, to which the model is ill-adapted and where therefore philanthropy is needed. Edwin Ou drew attention to the distinction between social enterprise and social business. It was the enterprise element that would provide solutions on a large scale, not the business element. For some things, like Camfed and Escuela Nueva, donor capital is needed. ‘It isn’t social business solutions that will create change,’ he concluded, ‘it’s world-class solutions.’ The second vote showed that the original view had strengthened: those against the proposition were now 78%.

Second proposition: when businesses do development, profit will always prevail.

Sixty-six per cent agreed, but Edwin Ou argued that while the statement is generally true, there is no absolute dichotomy. It depends, he said, on the business’ mission (what its means and ends are), how it defines profit (whether it can take social factors into account) and whether it is designed in first place (in terms of its governance structure and operation) to be able to accrue both economic and social benefit. Dominique Lemaistre agreed that the matter was more complicated than the categorical statement allowed.

Matias Bendersky argued that a clear-cut distinction between financial profit and social benefit is becoming harder to apply because of what he called the ‘empowered consumer’. Companies that take sustainability into account are outperforming their competitors in the stock markets (Nestle and Danone are only the most notable examples among many). Unilever’s sustainable living brands grew 30% faster than the rest of the company in 2016, while the recent hashtag revolt against Uber and its prompt reaction also showed the power of consumer. It’s a trend that’s here to stay, he said.

In the second vote, these arguments reduced the original majority to 56% in favour.
Third proposition: business models are more effective than philanthropy at dealing with social and environmental problems.

Seventy-two per cent disagreed. Edwin Ou was with the audience, but with reservations. He felt that the distinction is not so clear-cut. To solve problems, we need to engage entire systems of which both business and philanthropy are part. Escuela Nueva and Camfed are being taken up by the combined efforts of NGOs and companies. The SDGs would require vast resources – an estimated USD2.5 trillion – which all sectors will have to contribute to. Matias Bendersky again noted that, while business can be effective in some cases (he cited Coca Cola’s promised to replenish the water it used in its manufacturing processes) philanthropy can do what business can’t. It can react fast to crises (Hurricane Katrina, Haiti, the Ebola epidemic) because it has an understanding of local communities. Cooperation, not comparison was the key for Dominique Lemaistre, too. New forms of cooperation are needed which take account of the change in outlook of companies, especially in regard to climate change.

This time at the second vote, and despite the nuances introduced by the panellists, the original majority increased to 81%.

Fourth proposition: philanthropic money shouldn’t finance social businesses that make any profit.

Only 19% agreed with this. None of the panellists did. There is a big skills gap in Latin America, said Matias Bendersky, with many subsistence enterprise and few high-growth ones. It’s a limited ecosystem and philanthropy should invest in developing it. Social businesses don’t have the investment opportunities purely for-profit businesses do, said Dominique Lemaistre and can’t fund their own growth from profits as effectively.
Why shouldn’t philanthropy help them develop? Don’t tie one of philanthropy’s hands behind its back, urged Edwin Ou. It should try and have as much impact as possible by whatever means it can. Philanthropy doesn’t just have to provide grants, it can provide a whole raft of financing options and can bring in other forms of investment to help solve problems and he cited the example of coffee leaf rust disease in Latin America which is being addressed by multi-sector funding.

Their arguments raised the original majority to 87%. Social enterprise is a much-hyped term, objected a member of the audience. There is a rush to jump on the bandwagon before we even know properly what it means and before we work out how we can ensure the balance between profit and social benefit. There were lots of social enterprises before the term gained currency, Edwin Ou pointed out. It’s all about innovation and harnessing that innovation is where the definition and where success lies. We should be pragmatic and not get bogged down in definition.

With the growth of nationalism, suggested someone, governments are spending less on global solutions. What would this mean for social business, especially at a time when philanthropic money has to be spread thinner? Naila Farouky noted that the Arab Spring had seen an upsurge in some really innovative social enterprises, so it is likely that there will be an increase. The IDB is in a position to experiment and is trying to mix resources, said Matias Bendersky, and there is more appetite to innovate, especially when it comes to climate change. Are there early-stage solutions, social business or otherwise, which might alleviate global problems like migration, refugees and climate change? If there are, said Edwin Ou, and they seem as if they might scale, let’s fund them. For him, the real question is whether we are interested in scaling the organization or the impact. If it’s the latter, there will be ecosystem uptake, not just organizational uptake.

All in all, though we are still grappling with what is a hybrid between the business and philanthropy sectors, we should acknowledge that there is a spectrum rather than a line, that the distinctions between business and social solutions and benefits are not as black and white as they seem and that forms of cooperation that involve businesses or business models should be sought, not shunned.
Session 5: Not Business as Usual: How some businesses are defending civil society and how their support can be won

As the latitude for civil society action comes under threat in many places, business is emerging as an unlikely champion. A strong civil society equals long-term sustainability for business, proclaimed Paula Fabiani of IDIS (Brazil), but sometimes business needs to be convinced of it. She quoted from research done by IDIS: 83% of people surveyed think business can play an influential role in the development of society, but only 51% think it is doing so at the moment. She gave examples, however, of how business could and had intervened to defend civil society freedoms around the world. In Cambodia, clothing companies had stopped the government clamping down on strikers. In Thailand, an association of food producers had paid the bail of an activist arrested for exposing the abuse of migrant workers. In Angola, mining companies had signed an open letter in support of an activist who was exposing abuses in the mining industry. In Brazil, Avon is part of a campaign to end violence against women, supporting grassroots NGOs, undertaking advocacy and promoting awareness and the Instituto C&A is campaigning to eradicate forced and child labour by demanding transparency in its supply chain, supporting victims and fostering collaboration. These examples show, she said, that pressure from the private sector can influence government action in regard to civic space.
So business could act not only against popular expectations of it, but even against its own apparent interests, said Michael Mapstone of CAF, who moderated the session. Is it, in fact, civil society’s last hope, he asked provocatively? And what value does civil society place on it?
Martha Herrera of CEMEX in Mexico said that CEMEX’s partnerships with civil society acknowledge that both sides have their areas of expertise. Civil society has local knowledge and provides innovation. We are good at building alliances, she said, so collaboration has been good for us both, helping CSOs with resources and building CEMEX’s business case. The idea of ‘business as usual’ overlooked the breadth of expertise of civil society, said Maurice Makaloo of the Ford Foundation (Eastern Africa). There are a couple of assumptions that need to be reviewed, he said. First, that civil society is in need of a reset – in other words, that its attitudes and ideas are outworn – and that business is a late convert to the civil society agenda. Civil society doesn’t have a monopoly on ethics, he said, and we should recognize that. The two sectors are natural partners in the pursuit of social justice, he argued.

Granting this, funder associations often don’t have contacts with in the business community, said a member of the audience. How can they make them and help to foster alliances? Join networks or make direct approaches, suggested Martha Herrera. Find champions in companies, added Paula Fabiani. Ethical companies are an especially good target, but focus on family companies, rather than publicly listed ones, since the former can move faster and have more latitude, since the decisions are taken by family members, not shareholders. Maurice Makaloo advised thinking of insertion points and recognising that the cause of a problem will probably be manifold, so the solution will have to be, too and all sectors will need to be involved. Infrastructure organizations bring knowledge and networks and can play a mediating role between the private sector, NGOs and governments.
Does fear prevent business from getting involved in civil issues, wondered another audience member? They risk public vilification and therefore their reputation if they speak out, so they may prefer to keep quiet. CEMEX only engages in what it knows about, says Martha Herrera, such as housing issues, so it is on sure ground. Fear can be simple fear of the unknown, Maurice Makaloo pointed out. We can overcome that by documenting and sharing our experiences. Forming coalitions can help, too, suggested Paula Fabiani. There is strength in numbers.

So what should civil society learn, asked Michael Mapstone? To be flexible, to embrace emerging models and to recognize that the solutions to most of our problems demanded partnership. Our problems are everyone’s business, Paula Fabiani summed up. There are three sectors, she said. If we have two, it’s two against one. We can change the world.

‘This morning, we had an inspiring conversation on the links between closing spaces for civil society by law and violence against human right defenders.’
Laura Garcia, Semillas, Mexico.
Session 6: the WINGS 2017 IMAGine prize for outstanding service to the sector

Douglas Rutzen, President of the International Center for Non-profit law (ICNL), which campaigns for open societies and enabling legal environments worldwide won the 2017 Worldwide Initiatives for Grantmaker Support (WINGS) IMAGine Prize. The prize is awarded every three years to recognize an individual or organization that has provided exemplary service to the global philanthropy sector. Rutzen’s award was presented by Nick Deychakiwsky of the Mott Foundation, a longstanding partner of ICNL.

In a hard-hitting acceptance speech, Rutzen warned of the appeal and perils of a populist turn in over 100 countries in which ICNL works. Citing philosopher George Steiner’s ‘Nostalgia for the Absolute’, Rutzen highlighted the crisis of confidence in democracy and a growing appetite among electorates for authoritarianism. He pointed to a ‘populist playbook’ in which neglected groups are courted, scapegoats are identified and a manifesto of renewal offered by populist politicians. In a chilling reminder of the dangers faced by civil society today, Rutzen compared Donald Trump’s call for national renewal with Hitler’s promise to make Germany ‘great’ again in the 1930’s. Rutzen also warned of an impending ‘tragedy of the commons’ in which a seemingly rational embrace of self-interest could ‘destroy our common selves’. In response, Rutzen called on participants to join together in a movement to protect civic space and urgently invest in individual country strategies to counter these trends.

Speaking about the award, Rutzen said:
‘This is a team award. It recognizes the efforts of a community of people – including ICNL’s staff, Board, donors, and partners around the world – who have devoted their time and talents to promoting philanthropy and civil society. It was particularly meaningful to be introduced by Nick Deychakiwsky of the Mott Foundation. The steadfast support of the Mott Foundation is a primary reason ICNL is the organization it is today.’

The prize is named after the International Meeting of Associations serving Grantmakers in 1998 that led to the creation of WINGS’
‘Are you really a lawyer? You talk too clearly and sensibly’ - a remark once made to Douglas Rutzen of ICNL, this year’s winner of the IMAGine Prize, which was quoted by Nick Deykachiwsky in his introduction. Deykachiwsky took us briefly through Rutzen’s credentials – his prescience in seeing and christening the ‘associational counter-revolution’, his initiative which led to the appointment of a UN Rapporteur on Freedom of Association, his many nominations to the Nonprofit Times’ list of the top 50 influential people in the non-profit sector – and ended by talking of his commitment to civil society and his humility.

We are facing a crisis of confidence in democracy, Rutzen himself began. Populism is on the rise because people are attracted to simple explanations and because there is a feeling as in the 1920s and 30s, that conservative values are under attack. In 1995, one in 16 people in the US said they would support military rule. In 2015, the figure was one in six. The simple recipe for populism is as follows: first, find a group of the disgruntled; second, find an enemy, someone to blame; third, offer the disgruntled group a better future if they follow you. Donald Trump talks about making America great again.
The problem is easy to diagnose, but what is the solution? Focus first on a country strategy, he said, then look for commonality. Use care when it comes to language – even in this Forum, he said, we talk about ‘foreign funding’. We should not use the language of governments. And integrate social justice into your work, he urged, even if that’s not its main thrust.

And what can WINGS do in an era of populism? It can help its members reach beyond NGOs to the likes of trades unions and faith-based organizations and to business. It can help to build a movement. We need to engage the person in the street, we need to create safe spaces for dialogue. We are engaged in an historic struggle in which civic space, philanthropic freedom and democracy are all at stake. We must ‘bend the arc of history in our favour’. Let’s act and gain strength from each other. ‘We’ll do it, but only together. We shall succeed,’ he concluded resoundingly.

Rutzen cited a newspaper article from 1934 in which Adolf Hitler promised the Germans the same thing. Finally, tap the emotions. Populism encourages people to put themselves first (it’s the reverse of what philanthropy does, he pointed out), it doesn’t want to hear about complexity and dissent, in fact, it uses the law to restrict dissent. Eleven US states, he said, are currently debating laws to restrict freedom of assembly and expression.
Measurement of impact has been an increasing preoccupation of the non-profit sector. In trying to find a way to do it, have we focussed too narrowly on statistics at the expense of the more human elements of development?

This session used the ‘fishbowl’ format to encourage the audience to participate. In other words, the original panellists could vacate their seats if they chose and others from the auditorium could replace them. First of all, what’s were the panellists’ experience of trying to measure impact? Why are they doing it and how far have they got? The three organizations represented different points on the scale. For the Nacional Monte de Piedad in Mexico, said Pedro Romero de Terrero, the stimulus had come from the fact that it had started grantmaking 15 years ago, but when it had conducted a review in 2010, it had found that it had not had as much impact as it hoped. It is now looking for a new strategy.

Timotheus Lesmana said Filantropi Indonesia used four ways of measuring: beneficiary reaction (how do participants feel about it?); knowledge development (has the participants’ knowledge been expanded?); behavioural change (are participants applying what they’ve learned in their work?); and more objective performance measurement. He stressed the importance of data. If you don’t have data, you can’t be sure of your ground. We want to track our impact, sometimes even settling for a more modest impact if it means that we are sure we can account for it, he said.
But the kind of data you could use depends on the work you are doing. The Sacred Fire Foundation works with indigenous communities in Latin America to develop the buen vivir concept, which emphasises communities over individuals and draws on indigenous cultural ways of life. It’s something you can’t measure in numbers, said Sofia Arroyo, so they are faced with the task of trying to reconcile quantitative with qualitative measurement. At the heart of the matter, she said, is to decide what it is we are looking for. Are we maintaining a system, or are we trying to change it?

For many, the difficulty of balancing the qualitative with the quantitative is the critical question. Most organizations can take quantitative measurements, but few can measure the qualitative elements of their work. Sofia Arroyo noted in response that Sacred Fire Foundation has found storytelling a good tool for qualitative assessment, helping them track the effect they are having. How do grantees want to speak about change, that’s the question. We should be more flexible in accommodating what is important to them, she said, and mentioned the idea of using video-recording which is often easier for indigenous communities who have an oral culture. Another participant mentioned the use of video techniques to capture what they called ‘the softer side’ of a project’s effects, and another mentioned a project on similar lines called photovocies which allowed, and taught, participants to evaluate themselves, so that in effect, the evaluation is making change happen as well as measuring it. Since what’s at stake is the development of the organization concerned, most came down on the side of allowing the grantee or supported organization to develop their own measures, with one saying that they provide funds to help them to do it.
Pedro Romero took up the point about not imposing our values on grantees. Nacional Monte de Piedad had once funded a project to improve the lives of a poor community whose lives revolved around working at a brickmaking furnace. Once the furnace was lit, it required constant tending for 24-36 hours at a stretch, otherwise the bricks would be spoiled. This meant very hard work with children involved, too. The original intention of the project had been to improve the conditions of the community generally, and particularly to stop this child labour and send children to school instead. It failed. The community resisted the idea because they depended on the money their children brought in. The funder realised that they had to allow the children to continue working, while finding a way for them to study, too.

It was a hard lesson to learn, Romero said, but ‘you can’t change a fact of life overnight.’ The emotional response of grantees to a project is important, too. One audience member spoke of a project he had been involved in, the funding of a coffee growing cooperative in Java. In a very patriarchal society the grant had been given to encourage women’s participation. At the end, the grantmaker had got a report which was just numbers. But they also asked the women how they had felt about it. One of them drew a picture of herself before and after the project, which told its own story of how much she had benefitted. ‘We need to capture that,’ he said, ‘it’s very important.’

“We are the only community foundation in Singapore and there are very few of us in Asia Pacific, so coming to a conference like this is very helpful in terms of putting us in the global space, so we are kept in touch with global movements, even though some of the local issues we face are slightly different, but I feel that I’m not so much alone and part of the fraternity.”

Joyce Teo, the Community Foundation of Singapore
A representative from Community Foundations of Canada said her organization had had good results by using the Vital Signs method. It had started as a way of making better use of their grant money, but it has engaged the community in the work of the community foundation and has given both sides a frame to work with. An aboriginal coalition to end homelessness has come out of it, she said, and it has turned our organization from a reactive to a proactive grantmaker. Another Canadian participant whose organization is also using the vital signs method endorsed its value. The approach is community-led, he said, so there is more engagement and therefore more resources become available for the community. Its impact can be measured by ‘the number of people who show up for the conversation’.

What is the role of the infrastructure organizations in this? And, added Timotheus Lesmana, how can we measure our impact as a field? There is scope for sharing information on techniques, especially those for assessing the qualitative aspects of projects. Infrastructure organizations could usefully collect these and pass them on through their networks, suggested one participant. Looking at change in the well-being of grantees is difficult but it can promote a more strategic way of looking at one’s philanthropy, especially among new donors, said another participant from the floor. In fact, it can be a means that allows them to see if something changes which in turn, promotes more effective philanthropy. Infrastructure organizations should therefore promote this approach.

Moderator Ian Bird of Community Foundations of Canada posed a final question for participants to reflect on. Could these sorts of approach be brought together at a macro level where they might map on to the work of infrastructure organizations? Build a common picture if you can, cautioned someone, but don’t lose sight of diversity at the micro-level. Echoing what Sofia Arroyo had said earlier, the crucial question to ask is, why are we doing it, they said? That would provide the essential clue as to the right means of assessment.
The Barry Gaberman Lecture, given by Atallah Kuttab: The Role of Philanthropy in Building Bridges among Cultures and Creating a Just Society

There are diverse and long-standing traditions of philanthropy all around the world, says Atallah Kuttab. These not only provide a counterpoise to the destructive elements of globalization, they offer hope of maintaining human and community fellowship in an age of division.

As an engineer by trade, Atallah Kuttab is ‘someone who understands the importance of infrastructure,’ said Christopher Harris (Working Group on Philanthropy for Social Justice and Peace) in his introduction and invoking the speaker’s antecedents was especially appropriate given the lecture’s theme of rebuilding. Harris also pointed out that there is much more to Atallah Kuttab than an engineering degree – there’s also ‘the heart of a poet’, courage, humility and ‘a delicious sense of humour.’

In the previous Barry Gaberman lecture in Istanbul in 2014, began Kuttab, Avila Kilmurray had talked about the role of philanthropy in difficult times. It was tempting to call this lecture the role of philanthropy in even more difficult times. Many people in the Arab region are now refugees. Inequality and injustice appear to be everywhere on the rise.

Over the last 30 years, the world’s power structures have been increasingly devolving on to a small number of men and families. But he didn’t want to talk about the difficulties, he said. Instead, he wanted to talk about how philanthropy can help ‘if we act justly and wisely’. Global philanthropy is a blend of values and forces from around the world with a distinct set of local practices. ‘We all have rich cultures of giving,’ he said, sometimes spanning thousands of years. In some countries, the practice of philanthropy had suffered a period of decline but the last twenty-five to thirty years has seen a resurgence.
**Strength in diversity**

It is the diversity that makes it rich. He cited the example of Ubuntu in Africa. Such forms of solidarity and horizontal giving had been often overlooked because of a fixation with institutional philanthropy, but it has much to offer. The field is now beginning to understand and value such models and is taking steps to make them more resilient. Private social investment in Latin America is providing a sustainable approach to social change. Chinese philanthropy is using transparency to create space for the sector to make change and by finding creative ways to circumvent government intransigence on some issues – by not making child rights central to an initiative, for instance, but applying a child rights perspective to its work. Similarly, in Saudi Arabia, philanthropic support for women’s empowerment, modest as it might seem, is not just service provision, it is helping to change the attitude of a society.

Economic globalisation had favoured the rich countries, he said. If you have a US or a European passport, there are few borders. By contrast, ‘as a Palestinian, I was stateless.’ However, globalisation also means that none of us in insulated. The question is, can we now make common cause in the face of the closing space which has been such a key theme of this Forum? Can we learn from our fellows in the Global South how to be creative in apparently hostile environments and, as in the Chinese example above, focus on the concrete and avoid the language of rights when we have to?
The NGO sector is under pressure. It depends on international funding, because it is often starved of local resources. It needs to redefine itself, he argued, in order to have the legitimacy to promote local interests. What’s more, the rise of new forms of giving such as crowdfunding and faith-based innovations such as *rumah zakat* in Indonesia, and new, more fluid forms of activism in the shape of social movements mean that NGOs are no longer indispensable intermediaries. Even conservative institutions are becoming innovative.

The line between the profit and the non-profit sector is becoming increasingly blurred. We shouldn’t reject this development, but embrace it, we should encourage the growth of social business – provided those businesses are really socially engaged - and encourage the use of ‘more than one bottom line’. First, a less sharp divide between business and civil society will bring more resources to bear on the problems besetting us all. Second, the blurring of the line will allow philanthropy to operate on the profit side of the divide and give it more room for manoeuvre and finally, the more players, the more alliances, the more chance of success.

We need to draft new social contracts and capitalise on new partnerships and collaboration. And the role of WINGS? ‘We can champion bridge-building between the sectors.’ Who else is better equipped to bring together groups of every size and value. ‘Progress lies not in enhancing what is, but in advancing what will be,’ he concluded.

Where will WINGS be in 2040, wondered an audience member? Activists from the business sector should be in the audience, responded Kuttab. WINGS should go beyond philanthropy and try to get at the wider range of resources he had spoken of. How can we convince companies of the value of the triple bottom line? It is already happening, believes Kuttab. To take the example of CSR, minds are changing, companies are beginning to see it as a genuine means of making change, even it starts out as public relations. Doing good should not affect the bottom line. The real issue is to redefine what that bottom line is.

What about the key trends in the global south, asked another? There is some way to go, admitted Kuttab. ‘We don’t know what we are. We copy from the US,’ but the limits of that have been exposed by the modest progress of the Giving Pledge outside the US. What is needed, instead, is to support existing cultures. Muslim countries could use *zakat* and develop it. ‘We are failing to develop what we have.’
Session 8: Collective Impact Through Collaboration: Dramas and results

The vexed questions of collaboration: given the complexity of the problems we face, it’s increasingly indispensable but how do you make it work when the partners not only have conflicting interests but also, in some cases, conflicting organizational cultures? Meanwhile, on a fictional island, some familiar scenes unfold.

Lost in Translation

There was some light relief at the opening of the final plenary. Much had been made during the course of the Forum of the need for, and virtues of, working in partnership. The difficulties of putting such partnerships into practice, however, were comically illustrated by a skit in which some of the Forum participants got a chance to indulge their histrionic aspirations, even if some might be well-advised not to give up their day jobs quite yet. As Christopher Harris, who introduced the players, put it, ‘the artists have temporarily placed dignity, self-respect and reputation at the side of the stage.’

The plot: Barry Gaberman, WINGS’ presiding spirit, falls asleep (in an added comic touch, the part of Barry Gaberman was played by Wendy Richardson of the Global Fund for Community Foundations, since Barry himself was unable to attend the Forum). He then has a nightmare, the setting of which is the fictional island of Trouble, in which various scenarios are played out involving projected collaborations between a partnership foundation, the government, a community foundation, a private foundation and a group of grassroots activists to provide educational scholarships for a recently arrived group of aliens.
Unfortunately, in each case, the expectations of each of the partners are completely at odds and they are unable to communicate or can do so only on the basis of mutual envy and distrust. The community foundation has only modest funds, derisory by the standards of the government and bigger foundations, and prizes instead trust and compassion, neither of which the other two parties recognize. The government is only involved because it has a budgetary surplus it needs to spend. The private foundation and the partnership foundation work on different priorities and theories of change and each wants to insist on its own. The basis for the relationship between the grassroots activist organization and the partnership foundation is ‘the ability to swallow their mutual loathing,’ as the script puts it. Finally, ‘Barry Gaberman’ wakes up and realises with relief ‘he’ is at the WINGS Forum, where we all ‘communicate clearly, have no ego and celebrate our differences!’

At this point a recorded skype message from the real Barry Gaberman was screened. The US, he said, is sliding into ignorance and insensitivity, it is up to civil society to show what is progressive and possible. He added two cautions: don’t let perfect be an enemy of good. Strive for true collaboration but bear in mind that it’s not the only way. Second, he said, he wanted to emphasise ‘true’ collaboration. Joint funding is OK, but it’s not true collaboration, which only happens when funders and implementers devise a strategy together. This is labour- and time-intensive, it requires the funder to give up some power and it needs good listening skills, but it’s worth it for a number of reasons: it helps break down the power imbalance; it brings in more resources; it widens the circle of ideas and the range of skills that can be brought to bear on a problem.

‘The highlight has been to hear a global discourse on philanthropy and the emerging trends and challenges and how people across the globe are dealing with them. The value is in the learning, the sharing and the cross-fertilization and ideas.’ Shazia Maqsood Amjad, Pakistan Centre for Philanthropy.
The final session

After the 50 years and trillions of dollars of what might be called the ‘development era’, asked Tariq Cheema of the World Congress of Muslim Philanthropists, do we have more peace and prosperity? Hardly. How can we change that? He offered three steps: remain critical of philanthropy (he added his thanks to WINGS for drawing attention to this through the Forum); look with ‘clean eyes and a clean heart’ at what needs to be done; and put our collective impact, rather than ourselves, first.

What challenges and what advice did the other panellists have to offer when it came to collaboration? Carolina Suarez of AFE in Colombia, said that with the ending of the civil war in her country and inequality that is rife there, collaboration among those interested in social progress is imperative. However, most corporate foundations (the bulk of AFE’s members) find it hard to work collectively. After many false starts, 14 foundations had devised a collaborative project by using a means of collective ownership. They had set up a pooled fund, not controlled by any one of them, which operated in two different territories, which are broad enough to provide themes which can appeal to the interests of the individual foundations involved. It had taken time – six months – to work out the details. The initiative had involved finding a means by which they could work together on the same goal, suppressing corporate egos and their own way of doing things, and showed how different sectors could work together and achieve impact.
Nearly half of Mexicans live in poverty, many in extreme poverty, said Vanesa González of CitiBanamex. The community relations department of her company now works with local governments, corporate partners and NPOs across the scale, including social enterprises to support projects in low-income communities on key areas which include water and renewable energy. Last year, it received 3,000 proposals, some of them developed in social enterprise incubators. Generally, it provides seed capital in grant form and is now working on a social impact bond in partnership with the IDB, the Jalisco state government, NGOs and other companies. There are other signs of movement in the country. Many young people, she said, are starting to think about social issues to the extent that universities are not introducing a social focus to their entrepreneurship programs. This needs to be considered in Europe, too, argued one participant from the audience. At INSEAD business school, for instance, the emphasis seems to be on profit. Students need to be encouraged to think about social responsibility as well.
Final remarks

Philanthropy involves three things, argued Ana Toni of the Instituto Clima e Sociedade in Brazil, values, techniques and art. We have had all three at the Forum, she said. Art expresses the context we live in. Some paint, we do philanthropy. From the Forum, she said, ‘I’m taking techniques, I’m taking values, but most of the global expression of solidarity and strength.’

A question participants constantly circled back to is the role of WINGS. Earlier in the proceedings, Executive Director Benjamin Bellegy had compared it to the hidden part of the iceberg. It is the base, he suggested and it supports everything that’s above it. If this hidden part is strong enough, it can resist the strongest adverse currents.

Jenny Hodgson reminded participants of things we need to ponder: in terms of the 4Cs, in Asia, capacity is high but capability remains low and we are doing badly everywhere on credibility.

If it the proceedings of the previous two and a half days had been recorded, then fed into a computer and the computer asked to calculate the words and ideas that had arisen most often, the following would certainly be among them: trust, business and social business, partnership, power, local support, credibility, the need for more resources, restrictions on civil society freedom, the need to keep in mind the human and the emotional when calculating the effects of philanthropy, formal and informal civil society, the role of an infrastructure which often seems removed from problems and their solutions, the global role of WINGS and how it plays it and – more than anything else – values.
These had sounded throughout the sessions and nearly always, it was when their pre-eminence over all other considerations was being declared. Attitudes change slowly. Is this a sign that the philanthropy sector – or at least that part of it represented by WINGS – is moving away from an obsession with the material and the palpable?

There was also an ever-present sense of urgency, that sinister political developments were putting philanthropy’s back to the wall and provoking almost a sense of crisis. It was perhaps appropriate therefore that the Forum should end with the launch of the Mexico City Declaration, a statement of the Forum’s rejection of populist politics and the curtailment of freedom which signals ‘support and solidarity with those who feel threatened by the rise of prejudice or national supremacy movements wherever they appear around the globe.’

Next up: Nairobi 2020

It was announced at the conclusion of the 2017 Forum that the next WINGS Forum will take place in Kenya’s capital, Nairobi, in 2020. The selection of Nairobi, following a successful bid from the African Philanthropy Network (APN) will place philanthropy in Africa centre stage. As the field expands, it is expected that the 2020 Forum will bring together even larger numbers of foundation umbrella bodies and philanthropy professionals to reflect on their practice, exchange knowledge with peers and debate the issues of the day.
Funders Lunch and Meeting

Philanthropy Advisor and former Ford Foundation executive Chris Harris facilitated a meeting of around 40 donors and interested parties at a specially convened lunch at the 2017 WINGSForum. Chris Harris opened the discussion with three observations:

• Funders are increasingly resistant to funding the infrastructure of philanthropy
• Philanthropy infrastructure would not be an expensive proposition if funders took collective responsibility to fund it by contributing, say, 1% of their overall budgets
• If foundations want to effectively serve society, then ‘business as usual’ is over. The scale, severity and complexity of problems means foundations must collaborate with one another and other sectors

The meeting, under Chatham House rules, concluded with ideas of funding a further mapping of philanthropy infrastructure, the creation of a working group on infrastructure and a follow up meeting to review progress in 2018.

‘The Forum is very good for networking and for peer learning. I think the Forum in Istanbul was more interactive in process, while here we have more traditional formats …but we also have more new people in the room so that’s maybe the reason we were not so proactive from the very beginning. …but the networking aspect is just as good here.’ Oksana Oracheva, the Valdimir Potanin Foundation
Policy and Participation: Are we failing civil society?

Are there common challenges that civil society is facing around the world? And are there common remedies? This session drew on experiences from different regions to propose ways in which philanthropy can assist civil society in fighting a corner which is increasingly under threat.

It’s no accident, said Rob Buchanan of CAF USA, that there are many sessions at the Forum on the topic of the closing space for civil society, but in the face of this growing trend, what should donors’ response be? The panellists for the session would provide examples from their work, at the country, regional and international level, and he invited the rest of the session participants to contribute their expertise.

Adam Pickering noted the following examples: Kyrgyzstan had been under pressure from Russia to enact a law on foreign agents similar to the one in force in Russia. In response, Kyrgyz CSOs mobilized public opinion and petitioned every member of the Kyrgyz parliament before the vote. The bill was rejected. Similarly, popular reaction in Bulgaria had stopped a proposed law to make board members report their own income. In Slovakia, it was the opposition who had proposed a foreign agents’ law. Civil society’s tactics had been to ridicule publicly the idea and to increase the voluntary reporting of civil society organizations. Paula Fabiani from IDIS in Brazil noted a campaign to strengthen civil society through local giving. It both stimulates citizen participation and expresses the value individuals put on society.

Lorena Cortes (CEMEFI) spoke of an ambiguous situation in Mexico. While the legal and fiscal framework is well developed, the foundation sector itself is ill-defined. There is no legal definition of a foundation, so there is no clear sector identity, which makes it difficult for foundations to determine what their relations with government and with the public sector ought to be. On top of that, there are many problems to grapple with – the areas of rights and inequality stand out. Corporate funding doesn’t want to touch these issues, so organizations working on them depend on diminishing international aid. CEMEFI’s response has been to create an affinity group of members to create a common understanding of philanthropy organizations’ work, to create forums to bring grantmakers and grantseekers together on the issues of transparency and governance, to undertake research and to campaign to stop restrictions on some forms of activity.
Samar Haider of the Arab Human Rights Fund (AHRF) said that the closing space for civil society is not a new phenomenon in the Arab region. AHRF tries to counter it by concentrating on four areas in its grantmaking: flexibility – AHRF is trying to be creative and to take risks to make it easier for its grantees to operate. Some organizations, for instance, don’t have bank accounts, so AHRF has to find a way round that. It takes time, but it’s necessary; supporting fledgling organizations with technical assistance and giving them core funding, rather than making them invent projects in order to secure resources; creating a constituency among concerned parties. Local funding is not always the answer, she warned. In some cases, a volatile local situation can make it dangerous. Therefore, AHRF cultivates international funders for rights issues, but also campaigns among the business community, making them see that a free and fair society is their business, too; advocacy to ease the legal and financial situation – this is an issue for funders, as well as groups, because it means they are often unable, for instance, to send wire transfers. AHRF has a bank account in the Netherlands which has removed the option to wire money through the account, so the Fund is petitioning the bank to reopen the option.

Capacity-building and flexibility are also key to the work of the Open Society Foundation, said Tom Hilbink. Drawing on the morning’s remark by Eduardo Bohorquez about organization without organizations, he said that OSF funds networks, unregistered organizations and individuals. An organization for them is ‘two or more people working to make change.’ OSF pays attention to them and to how they function, and helps them to do it. It listens to what they need, even if it’s unusual. It stresses financial training because, at a basic level, it means government auditors can’t use the absence of it as an excuse to shut an organization down. Finally, he turned the spotlight back on funders. Where does our legitimacy come from, he asked? It’s something we need to consider.

‘Some of the discussions are not really new. I’ve been to AGAG, I’ve been to EFC and sometimes I feel that we’re not moving forward, but I just came from a really good session on art and how it is being used as an innovative way to make change and to mobilize resources and how young people are using art to build a purpose in their lives.’ Angeline Chitate, Southern Africa Trust
The session then became interactive. Participants split into groups to consider different scenarios (based on real cases) and to provide suggestions for responding to them:

**Where legal rights exist but their application is being eroded and civil society organizations officially harassed:**

Stay quiet, but document and analyse the situation;
Work through organizations that have no official existence and so are less amenable to government pressure and;
Mount a legal case and challenge government actions through the courts.

**Where the involvement of international organizations is discouraged or prohibited:**

Encourage international organizations to support domestic organizations as best they can with information on how they might capitalize on what freedoms there are (for instance, encouraging domestic fundraising by domestic organizations, as in China);
Encourage local analyses of causes and solidarity with the persecuted organizations by supporting the creation of spaces for local groups to meet;
Cultivate allies in the private sector and encourage them to speak out against restriction;
Try to involve organizations from the country with international groups;
As with the first scenario, set up a fund for legal advice and support.

**Where a relatively well-developed civil society exists but there is growing public sentiment and/or legislation against its political activity:**

Fund public awareness and educational activities on what civil society does and the restrictions it is subject to; Build coalitions among funders to advocate for civil society freedoms with the regulatory bodies; Create a funding pool to support capacity-building activities and the creation of a counter-narrative. If legislation against political activity exists, lobby opposition parties to challenge it; Press government to define clearly what it means by ‘political activity’ and educate civil society organizations on what is and what isn’t possible under the terms of the legislation. Support a campaign for repeal of the legislation.
Concurrent Sessions – Thursday, February 23rd, 2017

Emerging Approaches: Philanthropy and the Academy: Higher Education in the Philanthropy Ecosystem

*Academic study and teaching of philanthropy is growing but academia remains a peripheral part of the philanthropy infrastructure. This session looked at the possibilities for forging closer ties between philanthropy scholars and practitioners and presented the provisional findings of a WINGS survey on the topic.*

This well-attended session comprised participants who are philanthropy scholars, practitioners or both. After an introductory welcome by Barbara Ibrahim of the American University in Cairo, Pamela Ribeiro of WINGS presented initial findings of a survey of academic institutions involvement with philanthropy research and teaching. 60 institutions were surveyed and 19 responses received. Perhaps unsurprisingly for an emerging field, the biggest challenges identified were funding, staffing and institutional recognition. It was noted that philanthropy has a secondary role for most academic institutions, degree provision is limited and where teaching does exist, it tends to be situated in business schools and public policy schools. It was also noted that most formal university based provision on philanthropy is US based though there are signs that research and teaching may be growing elsewhere. Other notable findings included that 39 WINGS members have at least one partnership with academic institutions.
Bheki Moyo, an influential figure in the creation of Africa’s first philanthropy chair described how the idea for the chair was around 15 years old. It was originally linked to the African Grantmakers Network’s mission to promote the practice of philanthropy and an independent knowledge base about philanthropy. Now the new chair, launched in 2016, will become a space for convening between research and practice and teach multiple courses on different aspects of philanthropy from questions of public policy to issues of performance measurement.

Ingrid Srinath of Ashoka University described the creation of India’s first ever academic centre for the study of philanthropy. The liberal arts university was built by 90 philanthropists giving over $1 million each over the last decade. While Indian philanthropy’s general ecosystem is under-developed in general, there was agreement that reliable and accessible data is needed. Concerns about closing space and cross border funding debates can also be informed by research and data.

How to develop the interaction between philanthropy scholars and practitioners formed the basis of further discussion. What could WINGS offer academics? One suggestion was the formation of an academic affinity group to improve the flow of information between scholars and practitioners. Another was to build on the survey already conducted, gather more data and act on its findings.

After this introduction, the following panellists presented insights from their own institutional vantage points:

Heather Abu Sharif of the Gerhert Center for Philanthropy in Cairo highlighted the need to connect the philanthropy research agenda to the changing needs of the sector. This in turn suggested the importance of focusing research on the growing institutionalised philanthropy in the Arab region.
Stronger Infrastructure: What Use Are We? The 4Cs: Demonstrating philanthropy support organizations’ value

Philanthropy infrastructure organizations are often at a loss to explain to themselves and to others what it is they do and why. This session looked at the ins and outs of a new assessment framework, the 4Cs, which WINGS and its partners have developed.

Support organizations help to provide a conducive operating environment for foundations, said Liza Goulet of Philanthropic Foundations Canada, opening the session, they help them do their day-to-day work more effectively and they help them relate to each other. Most of this work is invisible, which means support organizations are often undervalued and underfunded, so WINGS and DAFNE have devised in consultation with their members (‘by the field, for the field’) a common framework and language for them to evaluate their work and to publicise it: the 4Cs, which stand for capacity (building resources), connection (relationships), credibility (reputation and recognition) and capability (building skills and knowledge). These four themes are further broken down into 12 outcome areas.

What have been the early experiences of the ‘guinea pig’ organizations using the framework? Alina Porumb of the Association for Community Relations in Romania said ACR had used outcome mapping to identify its outcome areas and to establish a baseline and had used to the 4Cs to assess progress in those areas. They have helped ACR understand the difference it is making and to improve its practice. A challenge (and this proved to be common) is to differentiate between the categories. What, for example, is an approach and what is an impact? This difficulty notwithstanding, the 4Cs will inform ARC’s 2017 strategic plan.

ASSIFERO in Italy is also using the 4Cs as a planning tool and to help increase its impact. In this case, the framework fits well with the association’s current strategic plan. Having failed to increase its membership and therefore its resources following a campaign over the past three years, its use of the 4Cs has helped move its focus from member services to social change.

‘One of the stand-out moments for me has been hearing Kumi Naidoo speak.’ Sarah Afraz, Ashoka University, India.
The crucial thing, believed Rosa Gallego of the Association of Spanish Foundations (AEF), is to find the framework’s connections with your work. Applying the 4Cs is a work in progress for AEF. It was using them because member surveys are not enough to assess our progress. The first thing is to translate them, so that everyone on the staff knows the context as well as the language of what the framework is assessing. The second thing is to find which parts of the framework are relevant to your organization. AFE has chosen two indicators for each outcome area, which proved difficult because they don’t all apply. Be ready for frustration, she cautioned and be patient.

Following small group discussions which considered one area each, a number of points were raised, not all of which were readily answerable. Someone noted the age-old problem of attribution. How could support organizations which worked at one or more removes assess this? We are not even able to identify what money goes to infrastructure, objected one participant, so what are we counting? The four C's do not capture the sustainability of philanthropy. Measurement of outcomes in terms of numbers might be easy or possible when it comes to outcomes, but not necessarily with impact.

• One of the difficulties most found in the 4Cs, as noted above, is the compartmentalisation of the areas. Most could foresee that it would be difficult to decide between outcomes and impact, and between capability and capacity, for example. The general answer to these questions was that each organization has to make its own starting-point and to develop the indicators that work for them. In addition, you could and should use the indicators selectively, as Rosa Gallego, had noted.

• Overall, the group agreed that, while there are difficulties in deciding how to tailor the framework and in finding ways to measure against the specified indicators, the 4Cs are a good starting point for a common evaluation framework, are a means of stimulating discussion about the area and a useful tool for planning, benchmarking and communicating organizations’ work. Leadership is crucial to their successful application and so is making them context-specific. Two specific challenges noted are that the indicator descriptions talk about what’s to be done, rather than what’s to be expected, so it’s hard to match them up with outcomes and that a feedback tool for members is also needed. If the framework is become an industry standard, there is more to be done and the group looked forward to reviewing progress at the next Forum.
Policy & Participation: Political populism and philanthropic infrastructure

What tactics is philanthropy in different countries using to counter the rise of populism and how can philanthropy infrastructure organizations support them?

Political developments, culminating in the election of Donald Trump to the US presidency, formed a ground bass to the whole Forum, and are provoking something of a crisis in philanthropy. Rutzen’s address earlier in the day framed this session, said moderator Rosa Gallego (AEF). An increase in polarisation, the ‘post-truth debate’, the lies on which populism is based, the rise of nationalism which is the basis of populism: these are trends which the world is facing. What can WINGS, do to counter them as a global association at a time when states are becoming increasingly inward-looking? The panellists came from countries which represent different points along the political spectrum, she noted. Paula Fabiani (IDIS) is from a Brazil with a populist past; Vicky Spruill (Council on Foundations), the US, which appears to be sliding into populism and Sara Lyons (Community Foundations of Canada) from a country which has so far not fallen victim to the phenomenon.

Whether populism comes from the left or the right, said Paula Fabiani, its common basis is that it tells people what they want to hear. In Brazil, populism had left a legacy of high government spending, which had resulted in economic crisis and a series of corruption scandals. How did philanthropy respond? By funding initiatives to strengthen civil society, by building local philanthropy (particularly important in an environment where external funding is likely to be restricted) and by collecting data (information is an important weapon). In a crisis, she noted, giving often increases, which produces greater citizen mobilisation, which is what happened in Brazil. Philanthropy can support these developments. She mentioned a number of initiatives that had taken place: the establishment of a fund to promote the culture of giving; a Ford Foundation grant which had laid the basis for an endowment, and hence the sustainability of, a domestic human rights funder in Brazil; ethical vetting of political candidates and supporting them through their campaign, likewise support for civil society leaders.
‘Are we in a bubble?’
Vikki Spruill underlined the difficulty that membership organizations could find themselves in in a polarised political environment. She was speaking in a personal capacity, not as a representative of COF, she specified, because, ‘some of our members like Trump.’ The US is a divided nation at the moment and the same goes for COF’s membership. She was surprised by the lack of strategic thought about what philanthropy should do and noted a state almost of paralysis in some quarters. ‘How did we miss it?’ She wondered. ‘We need to look at ourselves. Are we in a bubble? We talk of inclusion, but we are not hearing everyone.’ She noted that few foundation leaders had made public statements. Was this because of fear, she wondered? One action that COF had taken in response to developments, was to convene foundation meetings to address concerns among foundation staff. She also noted the need to promote consensus to protect the democratic process and to fund investigative journalism.

‘We are all vulnerable’
In Canada, there is an effective social safety net and the state is still seen as a fair social ‘referee’, said Sara Lyons. But, ‘we have problems, too’. There are big disparities, for instance, between the welfare of the indigenous communities and that of the rest of the country – 4% of indigenous children are in care, she said. There is some stirring of populism among the political parties, with one opposition party suggesting screening new migrants for ‘Canadian values’ and, according to the Edelman Trust Barometer, which measures public trust in major institutions, Canada has become a ‘distrust’ society. Philanthropy’s counter should be to promote trust through partnerships, support impartial journalism, economic inclusion and fair labour policies and also to advocate with government on these. We also need to question ourselves, she said, echoing Vikki Spruill. She mentioned the work of the Inspirit Foundation which organises convenings between social change leaders and policy-makers to disseminate stories of inclusion, and a journalism bursary to fund the investigation of one policy theme. The theme of CFC’s conference this year is belonging, something which is critical to Canada’s future, and it is funding conversations on the issue. We are all vulnerable, she stressed. As infrastructure organizations, we need to put the emphasis on listening and not necessarily take positions in a hurry. Trying to bring people together is our job, she urged. We must strengthen voice in the local community.
Like Vikki Spruill, she took up the theme of the need to balance the sometimes conflicting interests of members. It’s hard to pitch your voice on a range of membership voices, said Sara Lyons, but it is easier in Canada because the country is less polarized. Could COF use the divergence in membership to hear the voices it had previously missed, wondered one session participant? Yes, agreed Vikki Spruill, we mirror the country so we could help bridge gaps, but it’s difficult when values are at stake to have one position among a diverse set of views. Most of the audience agreed, though, that philanthropy support organizations could and should take a position. A delegate from the Polish Donors Forum said Poland had been in the grip of populism since 2015. ‘We should not just listen, we should give voice.

*Embracing vulnerability*

Douglas Rutzen agreed and put two questions to the session: how can infrastructure organizations protect the community? How can they get out in front of regulatory reform? A difficulty acknowledged Vikki Spruill, is that philanthropy and its support organizations have not done a good enough job at publicising their value. ‘Even legislators are vague about it,’ she noted.

Going back to the idea of vulnerability voiced by Sara Lyons, Paula Fabiani asserted the need to ‘embrace and digest it’. Corporations can be friends and allies, she said. In Brazil, they were ranked first on the trust barometer. They can promote positive changes as well as fighting negative ones. Overall, it was agreed that building coalitions and creating forums where the different parties in a polarised debate can come together. Jonah Wittkamper of the Nexus Global Youth Summit spoke of an initiative in which the children of wealth-holders are being brought together of different cultural backgrounds and shades of opinion are being brought together to find common ground. Such forums may offer the best hope of reconciliation among divided societies.
Stronger Infrastructure: Business Models for Infrastructure organizations: Pathways to sustainability

Balancing purpose with the need to pay their way – a familiar challenge for infrastructure organizations. This session explored the virtues and drawbacks of strategies such as selling services and asking members to pay for one-off projects over and above their dues. It also looked at what happens when a key figure leaves.

What value do we create? How can we monetise it? How can we sustain that monetised value? These questions underlie a business approach to maintaining infrastructure organizations, said Hilary Pearson of Philanthropic Foundations of Canada, one of the session’s moderators. What were the questions the proposition threw up?

Six broad themes emerged:

• The tension which might arise between earned income and pursuit of the mission;
• Balancing the interests of members on the one hand and donors on the other;
• How to diversify beyond fees and charges;
• How to ensure the organization was sustainable if the leader or founder (who could often be the same person) left;
• How to cope with the demands of a changing external environment; and
• The challenge of asking member for more than dues.

‘The most compelling concept that I have discovered is that in 15 years or so we have moved from charity and traditional assistance way of doing philanthropy to social justice...that social justice is being discussed in a place like this is great.’ David Perez Rulfo, Comunalia, Mexico
A number of difficulties and possible solutions surfaced under all these heads. In terms of leadership, several participants noted its importance and, correspondingly, the difficulties that succession could pose, no matter how soundly based the organization is financially, and several examples of this were offered. It is crucial to avoid what one participant called the ‘personification’ of the organization. Another noted the need to develop relations between donors or members on one side and other staff beside the CEO of an organization on the other, so that the links between the two would be more likely to endure a change of leadership. One alternative, building on this idea, was to make the organization a partnership, rather than one based on individual leadership. Another noted the importance of the board. It could act as a link between new and old management regimes and IDIS in Brazil was pointed out as a successful example of this. The same observer noted the value of an endowment as a tool for long-term sustainability. It is relatively little-used, but provides the freedom to plan.

The problems of extending the financial commitment of members beyond dues was also commonplace. The richer members are often likely to bear the brunt twice – and sometime to resent this – since many organizations operate a graduated scale of membership fees, and they are more likely to seek extra contributions from those members, too. In response, it’s important to be clear about what the fees pay for and what are extras and, added someone, to do this annually.

One group noted that, while it is important for the sake of an organization’s health and survival to have diverse sources of income, there is a difference between the language of sales and mission, which is sometimes an obstacle to organizations’ earning income. The difference could potentially alienate one side or the other.
Raul Escobedo (CEMEFI) agreed on the importance of relationships (he also emphasised the importance of trust, something which came up in almost all of the sessions, whatever their theme) and of sticking to your mission. Members ‘need to know what they will get from you,’ he said. And he added, make sure you focus on your expertise.

Overall, the lessons which emerged from the session were:

• Be flexible, but stick to your programs;

• Build a brand as well as delivering quality services. This might sometimes mean dropping things you have done previously;

• Trust in your own competence;

• Balance opportunity with capacity. Don’t be tempted to try and take on more than you can usefully do;

• If you are a funder, invest in infrastructure.

Interesting to note that this session only happened because the Forum planning committee had decided unilaterally to include it. None of the very varied 96 proposals received for workshops before the Forum had come anywhere near it.

**A question of identity**

To nearly all these issues, the question of identity is central. Hilary Pearson noted that, from PFC’s experience, the more transactional your relationship with members, the more dangerous it is. The more you focus on the transactional element, the more you betray your mission. You have to decide: are you a leadership organization or a service organization?’

She noted a big change in the environment in Canada, with increased competition when it came to service provision. This has put PFC under pressure since they now had competitors in all their fields of endeavour, *except* advocacy, so that has become their unique contribution. To do this, PFC has to engage very deeply with its members and, the deeper it goes, the greater its credibility and, hence, the greater its ability to advocate.
Policy and Participation: the SDGs as a tool for improving enabling environments for philanthropy

This session explored how philanthropy networks are using the 17 Sustainable Development Goals (SDGs) to create new spaces and narratives for philanthropy. It was presented jointly by the OECD, The Foundation Center and Rockefeller Philanthropy Advisors

Chaired by the Council on Foundations, Natalie Ross, the panel comprised perspectives from around the world of philanthropy including Shazia Maqsood Amjad from the Pakistan Center for Philanthropy, Lorena Cortes from Cemefi in Mexico and Timotheus Lesmana Wanadjaja from Filantropi Indonesia.

Cortes opened by noting that there is no legal status for foundations in Mexico. Any organization can call itself a foundation and some organizations which are not called foundations act like them. In Mexico, corporate foundations have typically led private efforts on the SDGs. In 2014, OECD approached Cemefi to produce guidelines for effective philanthropic engagement between foundations and government in Mexico.

Shazia Maqsood Amjad highlighted new research on Pakistani giving. Pakistani’s give approx 1% of GDP annually pointing to a strong indigenous philanthropy. Amjad argued however that household giving needs to shift its priorities. Too much, she noted, goes to Madrassa’s and mosques and not enough to effective strategies to address the SDGs.

Amjad commented that SDG Goal 17 on partnerships was critical to philanthropy in Pakistan. Here, she highlighted a partnership between the Gates Foundation and the Pakistani government with the foundation giving loans to end polio in the country.
Natalie Ross observed that the SDGs apply as much to the US and other developed countries as they do to Pakistan and Indonesia. Ross pointed out that US poverty level would be halved by 2030 if the SDGs were implemented. She highlighted the Council’s ‘sub-national approach’ aiming to engage US foundations in the SDGs in five regions to date (NY, Bay Area, Florida, Minnesota and New Mexico). Ross also pointed to how the ‘Impact 2030’ initiative is aiming to align corporate foundations on SDGs while mayors and states are organising around SDGs to push back against what is perceived as President Trump’s regressive agenda in this area.

Emilie Ramon from the OECD highlighted that the SDGs are a means not an end and create new opportunities for alignment and co-ordination within and between sectors. She argued that more needs to be done to educate governments about philanthropy to capitalise on the growing interest in this space.
Exhibition Area

This year WINGSForum made it possible for some of WINGS members to present their organizations’ initiatives during networking time. Throughout the first two days of the conference, nine organizations set up their exhibitions during two 30-minute coffee breaks. The presentations were very dynamic with plenty of interaction between the exhibitors and WINGSForum participants. The organizations selected were:

- GlobalGiving
- Cemefi
- Instituto para o Desenvolvimento do Investimento Social (IDIS)
- NEXUS
- Southern Africa Trust
- CECP
- International Community Foundation
- Grantee Experience and Insight Review
- Comunalia
Interviews

During the WINGSForum 2017, Alliance conducted interviews with a cross section of participants. Below it is presented their perspectives on philanthropy infrastructure and their reactions to the Forum.

- Ananth Padmanabhan, Azim Premji Philanthropic Initiatives, India
- Shazia Maqsood Amjad, Pakistan Centre for Philanthropy
- Dr Thomas Paulsen, Korber Stiftung, Germany
- Maurice Makoloo, Ford Foundation, East Africa
- Shaun Samuels, SGS Consulting on behalf of the African Philanthropy Network
- Emilie Ramon, OECD
- Richard Marker, Wise Philanthropy
- Jason Frankin, Johnson Center for Philanthropy
- Manuel Arango, Mexico Centre for Philanthropy (Cemefi)
- Masha Chertok, WINGS
Ananth Padmanabhan, Azim Premji Philanthropic Initiatives

You were involved in the first session of the event, which was a very challenging one about the difficult relationship of philanthropy with capitalism and wealth creation. What are your reactions to that plenary session?

Well, the growth in philanthropy – and I’m talking about organized philanthropy by very rich people - is clearly a consequence of the growth in capitalist wealth accumulation. That’s a fact but it doesn’t mean that philanthropy can’t get past that. To me it seems important to acknowledge that philanthropy is inextricably linked to a certain kind of capitalism and that does create conflicts, but the problems that causes are not insurmountable.

What can you, in your position do, to transcend those constraints? Would all of that wealth need to be recycled to philanthropy, or it would have to be focused on certain systems change?

For me, the real question is what can I do with the mandate that I have that can really make a difference. We are less than three years old but we already have a portfolio of about a hundred clients and our commitments are close to 120 million dollars. We have substantial grants to organizations who are doing good, direct work with five or six vulnerable communities - street kids, the homeless, women who are in situations of domestic violence, girls who are trying to find their feet in the world with tremendous constraints, the disabled and small and marginal farmers.

Do you think philanthropy should be challenging governments when they see them as abusing their power?

We have a very good constitution which is an embodiment of the values that we would like to see in society, so we have a very easy way of navigating the difficulties that you are talking about. I think there is a lot of important rights based work that can be done and that we are doing that is not in conflict with the government at all in the sense that the government is trying to live up to the constitution and so are we.
What’s the relationship between the Azim Premji Foundation and the Azim Premji Philanthropic Initiatives?

We’re a traditional grantmaker working on a range of issues. The Foundation is an operating foundation that works on a single issue, improving the quality of public school education in India. India has an astounding 130 million kids in school and something like 6.6 million schools and not enough quality teachers to go round so the Foundation has set up the Azim Premji University to train teachers.

In the session on funders and infrastructure, you identified three considerations. One was a question about what your organization should do yourselves as distinct from your grantmaking. The second was lack of common cause between Indian civil society and national donors and the third was the lack of a socially minded infrastructure in Indian philanthropy. Do you see any likelihood of investment by APPI in philanthropy infrastructure going forward?

I think there are the elements of an infrastructure already there. We have an association of the NGOs. We have the national foundation. We have a few pieces, but they need to come together and I think WINGS members could perhaps take the lead in that process. One of my big takeaways from this place is that we need a clear infrastructure.

The second thing is that the bridge between Indian funders and Indian NGOs that needs to get much stronger. Is philanthropy trying to change the world or is it trying to include people who have been excluded? Those are very different things. Everywhere in India you see that people are better off. Although indicators show a more complicated picture, rapid economic development has done a large number of people good. It hasn’t done everybody good. It’s also left people behind, that’s true. It has exacerbated some old issues of discrimination, that’s true too, but it’s easy to think that structurally, there’s nothing wrong, it’s just a matter of giving it more time to insure that the Indian welfare state works. That’s really the position which Indian philanthropy today comes from.
You’re going to try to help the India welfare state to work better through your programs and ultimately you hope that government will be responsible for welfare rather than philanthropy?

Yes. There is no way in which philanthropy can be responsible for welfare. Even the biggest giving in India is nothing compared with the amount of money that the government spends on, say, nutrition. So philanthropy is a catalyst, it’s not really the player. So the idea that there is something fundamentally wrong with our world – which, by the way, is what I believe personally - is not one that is necessarily shared by philanthropists in India. Their view is that we are doing a good job, we could do better, but we are in the right direction.

Do you agree with Kumi Naidoo when he said that big philanthropy is engaged with ‘fool’-anthropy, fooling themselves that things are OK and not really making a significant change?

No, I think that’s not true.

Philanthropy is not too complacent in your view?

Philanthropists feel good about themselves and they feel good about what India has achieved in the last 20 or 30 years, and why not? There are 600 million people in India who are very poor, but it is equally true that there’s visible change in the last 20 or 30 years. It’s a glass half-full or a glass half-empty situation that Indian philanthropists and Indian NGOs need to resolve.
How long has the Pakistan Centre for Philanthropy been running, and what does it do?

The Centre was set up in 2000 and we do three things; one is our certification program for civil society organizations. The second thing that we do is research. For example, we recently launched a study on giving in Pakistan. Third, we make connections between grantmakers and grantseekers. So we connect philanthropists to the organizations that we’ve vetted.

What brought you to the WINGS Forum?

I believe that it is very important for national centres to connect to the international discourse on philanthropy. I think WINGS provides that platform where you engage with other similar actors working in the field of philanthropy. You not only meet people with whom you can have shared pieces of work but you also discover important resources.

Are there any examples of that from this Forum?

We are now in a phase of developing a digital portal for our certified organizations, especially the smaller ones working in marginalized areas who do not have the resources to develop portals of their own. I’ve met people from Techsoup, I met somebody from CAF, I met somebody who has done a digital platform for Bangladesh. These are the resources I’m going to tap into when I get home and learn how they did it, so that sort of thing helps you to minimize errors or to make course corrections with a means to access those choices, to make informed giving decisions.
So it’s been a success?

For me, it’s been an awesome occasion to meet loads of people whom it would be impossible for me to meet at an individual level.

What’s the main lesson you take away?

I think we need, as PCP, not only to make people aware of the choices they have in contributing to development through giving, but to also provide them
In a session on the future of philanthropy, you referenced Hamburg as being at the centre of German philanthropy. Why is that?

I think there are two factors. One is that Hamburg is a rich city, with many rich families and successful individuals who decide to give something back to society. The second factor is that the way the legal framework is applied in Hamburg is very pragmatic. All foundation law in Germany is state law, so it’s up to state governments how they make and apply those laws.

How old is the Korber Foundation and what does it do?

It was established in 1959 by Kurt Korber, who was a very successful entrepreneur. It’s an operating foundation, we don’t typically give grants although we do offer some support for philanthropic infrastructure.

How do you support philanthropic infrastructure?

We’ve just given a grant to DAFNE together with the Robert Bosch Foundation so that they can establish a policy advocacy function in Brussels, because we think that it’s important to have a voice for European foundations in Brussels.

What do you want them to say with that voice?

Promote laws which support cross-border cooperation among foundations. The European Foundations Statute has failed and it will take some time until you can start a new effort but that’s the idea behind it. We also give money to the European Foundation Centre. We are a member of the governing council and also the management committee and we support initiatives like the European Community Foundations Initiative, so we are supporting infrastructure in several areas.
As we learned at the meeting, funders who support infrastructure are the exception, not the rule. What makes you the exception in this case?

I think it’s a matter of values. If you believe that it’s important to have some infrastructure on either the national or the European level I think as a foundation you should become involved. For me, the idea that philanthropic infrastructure organizations need to prove their immediate value to the founders or the funders is wrong. You cannot expect results. It’s more just a matter of value. American foundations played a big role in establishing the European Foundations Centre for example, and other infrastructure entities in Europe. Now Europe is pretty rich so you would think that it could support its own philanthropic infrastructure, but I’m sad that we still need American money.

**Your international work addresses conflict resolution and intercultural dialogue? How do you approach that?**

I can give you two examples. One is a project we had for many years where we brought together representatives from Israel, from Syria, from Saudi Arabia, from Iran, from the United States and from Europe to have very confidential discussions about the conflicts in the Middle East. Officially they could never have met. Another example is a network of European history competitions in 25 countries in Europe. Every year, about 13,000 school students participate. The largest one is in Germany, but the second is Wales and the third one is Russia and so far 200,000 students have participated. I think that’s a very good contribution to European identity and unity. I also think an open approach to your own history is a very important element of an open society, so we are trying to establish competitions in countries in which there is none yet.

**German society has been very open in the last year. Are there limits to that openness and what role can philanthropy play in relation to issues like dealing with a large numbers of immigrants and refugees?**

Foundations can certainly play a role in integrating migrants into society. The main task is always the state’s because nobody has as much money, but foundations can try out new models. And with regard to democracy in Germany foundations play a very big role through, for instance, supporting democracy education in schools.
You spoke in the session about the relationship between business and civil society, and expressed concern that there’s sometimes too much mutual misunderstanding. Can you elaborate on that?

Civil society has a role to play and the private sector has its role. What happens quite often, though, is that they do not see themselves as allies; each one paints the other as devoid of either understanding or appreciation or capability. There may sometimes be some truth in that, but sometimes it is hyperbole. What we really need to do is encourage both sides to understand each other better.

You also made a point that civil society does not have a monopoly on virtue. But do you feel that it is intrinsically more virtuous than business because it doesn’t pursue profit?

I worked a long time in civil society before going to the Ford Foundation. I do not want to be self-righteous but I ask myself, what are the motivations that took me to civil society? The spirit of volunteerism, of putting others first, is much higher in civil society than in private sector, where it’s profits first. But as I said earlier, each has their space and laws impose obligations to behave well on both sides, but if it is a question of the spirit, the motivations matter and there are more noble motivations in civil society.

Ford’s commitment to funding global civil society and philanthropy infrastructure is legendary. What do you think WINGS brings to the work the Ford Foundation?

For me, the WINGS Forum is a moment to get many philanthropy infrastructure support partners together. It offers, for instance, an opportunity to learn from the Mott Foundation, to learn from philanthropy advisers and many other people who are doing this. So WINGS for me is a space for building bridges, for sharing what works well and what does not work well and to talk - like we are doing right now - about the things that matter. For instance, as a foundation we have our ways of thinking about measurement but how do other people think about it. It’s an opportunity for peers to check on each other, to challenge each other and to learn from one another.
Do you think more funders should be funding philanthropy infrastructure? And if they’re not why is that?

Without doubt. The starting point of infrastructure is to underscore the value of philanthropy. Yesterday we had the conversation about whether philanthropy is a friend or a foe of social justice. If it’s ‘for’, philanthropy needs to raise more resources for social justice, because social justice is in need of more actors, so infrastructure organizations can support that by having that debate.
Shaun Samuels, SGS Consulting on behalf of the African Philanthropy Network

What’s been happening at the African Philanthropy Network and what are the challenges?

At our last biennial meeting in Tanzania, there was a decision to almost shift focus and change name. Previously it was African Grantmakers Network, but that didn’t really take account of the different forms of giving we have on the continent. It didn’t celebrate local giving, or what we call horizontal giving which is inherently an African way of giving. The change of name to the African Philanthropy Network has made the network much broader, so for example we’ve created a home for the academic world to come in, for corporate social investment, for large foundations, and also for community foundations. So we are redefining our strategy and preparing for the 2017 Biennial in Lagos. We’ve also just had our bid to host WINGS 2020 Forum in Nairobi accepted.

What are the benefits to you of WINGS?

First of all, social capital. Part of our challenge as APN is to distinguish Africa as a continent from Northern notions of philanthropy but that quest can also exclude us from global discourse. WINGS offers us a global platform. Second, WINGS’ tools especially around the concept of accountability are proving very useful to our member organizations. Third, the prospect of the WINGSForum 2020 helps us shape a conversation with WINGS’ support on how to provide an African context to the discussions on philanthropy which is also linked to the global context. Having the forum in Nairobi will allow us bring a lot more of our African stakeholders to the event.

I also think that WINGS could link us to a number of networks that are dealing with similar kinds of issues. The conversation here about the Arab world for example and their experiences around networking – we can learn from and draw that into our continent. Really, it’s a way of exchanging knowledge and experience between infrastructure organizations around the world.
The Organization for Economic Co-operation and Development (OECD) has launched netFWD which tries to encourage foundations to be involved in the international development efforts, specifically around SDGs. What does that involve?

We launched the network because we felt the international community and foundations needed to engage more with one another. So we work as a vehicle between these two worlds that don’t often connect. Three years ago we designed guidelines for effective philanthropy engagement which basically say that there is a need for mutual understanding and recognition of each other’s value. For instance foundations can be innovative and test new things while governments can then get what has worked to scale. We have implemented that in a few countries, in Mexico, in Kenya and in India.

What kinds of foundations are members?

We have a few big American names, like Ford or Kellogg but we also have some Europeans like Shell, Stars, Novartis Foundation and we have some from Latin America like the Ayrton Senna Institute, the Banorte Foundation which is one of the biggest Mexican banks and we have some from the EMEA region like the Sawiris Foundation in Egypt or the Emirates Foundation in the UAE. What they have in common is a willingness to increase their impact on the ground and an understanding that in order to do that they need to partner with others and especially governments because they can ensure scalability and sustainability for their projects. There is also a need to educate governments on what the philanthropic sector really is because their understanding is so limited. They tend to assume that all foundations are like the Gates Foundation and we try to make them understand that it’s not really the case.
What brought you to the WINGS conference here in Mexico and what are the benefits of being here?

In our work we see a clear need to build an infrastructure for philanthropy. One of the common recommendations that came out of our work in Kenya and in Mexico is the need for a National Association for Foundations because if foundations want to influence policy, they want to be taken seriously by governments they need to speak with the same voice so their messages will be much more powerful. For instance, I was at a workshop at the end of last year in Kenya and that brought both civil servants and foundation people together. One civil servant said ‘you guys need to put your house in order because it looks a bit chaotic’. WINGS can really help foundations do that. And for us, it’s a network where we meet our peers. It’s one occasion every three years where we can talk to people that do the same work as us and also take the pulse of the sector.

What sense of the sector have you got from the Forum so far?

There is a lot of thinking about the implications of the political changes around the world on philanthropy. For example, thinking about whether philanthropy should be the watchdog for civil society and whether it could also be an opportunity for philanthropy to play an increased role in development.

Which do you think it should be?

I think is should be both because they are totally complementary.
Richard Marker, Wise Philanthropy

What brought you to the WINGSForum?

I’ve worn a lot of hats in the philanthropy world. I used to head the Edgar Bronfman Foundation and then I started Wise Philanthropy, a consultancy which I run with my wife. I also teach at the Centre for High Impact Philanthropy at the University of Pennsylvania. We’ve done a lot of international conferences and I figured WINGS was a natural setting for us, given how much work we’ve done internationally. We’re here because these are natural simpaticos, these are people that should know about us and we should know about them. And having been here, I’m quite convinced it was the right decision to both join and to be here.

It’s interesting because there are not so many philanthropy advisories here.

I’m here as an educator. One of the conclusions I gradually came to after being in the field for so long and why I’m so committed to education, is that it’s unconscionable that we have no barrier to entry for philanthropy professionals. We’re responsible for billions of dollars. We’re responsible for supporting an entire sector. We’re responsible for having an influence on public policy. If you’re a professional my view is there should be a requirement that you have some credential and that there should be some continuing education that shows that you’re appropriate for the field.

And who should provide the credentials?

My view is the field should develop it together based on the core competences. There should be some sense of the nature of the not for profit sector, what it’s role is and what it could be, what are the ethics and issues of philanthropic power, what are the legal requirements and the financial systems, what are the different kinds of strategies to accomplish different kinds of goals, what are appropriate exit strategies, what are appropriate ways to use evaluation, what are appropriate ways to align investment and spending policies, and so forth. However, since it’s never going to be required legally, the only way you’re going to have some sort of certification that the field buys into is if you bring a consortium of interested people together who agree together to develop what the certificate is.
Where does the name Wise Philanthropy come from?

In an article I wrote in 1999, I used this quote: ‘It’s hard to say no graciously. It is even harder to say yes wisely.’ So that’s our rationale: how do you do philanthropy wisely?
How have you found the WINGS gathering so far?

It’s been great. I always love the WINGS gatherings. You get the chance to have conversations about what is happening in so many different countries around the world and I’m always amazed by the similarities of experience and the learnings that you can get in really unexpected ways between groups from different countries.

One example is the conversation we got into around democratizing and digitizing philanthropy and comparing the examples of SMS giving in the Ukraine and payroll giving in the UK. The biggest insight was that these tools facilitate giving, but very few of them really replace relationships and the amount of effort that remains on the fundraising organization or the platform developer to build trust over time. They don’t replace the communication and trust building that is at the heart.

At the beginning of 2017, the Johnson Centre produced some predictions about philanthropy and one of them was that traditional philanthropy infrastructure organizations would have to adjust to meet evolving needs. What might that mean for this group?

First, we have more infrastructure players than ever before and so that raises the question of what the value of any given organization is. Second, how can infrastructure organizations serve as leaders and yet balance the fact that many of them have real diversity of opinion within their membership?

What are the applications for WINGS of those two points?

There are certain shared values across WINGS members like the necessity of maintaining an open society and preserving civil society and they offer an opportunity for WINGS to speak on behalf of a global membership around a shared common view. On the flip side, I thought the opening session on whether philanthropy is a friend or foe of social justice was fabulous. WINGS can be a space to debate questions like that that we do not have an answer to.
Do you think WINGS is better placed to ask those difficult questions than other infrastructure bodies?

I still believe that for the global philanthropy community, WINGS is the forum that brings together the mix of actors to have that conversation. You don’t find the same mix of infrastructure organizations, membership organizations, funders, academic centres in any other place that you do find at WINGS.

At the same time, like every other individual infrastructure group I think there are question marks for WINGS about where its value is and what WINGS does that only it can do. One is providing that forum for debate. Another example is the debate about the use of business models to fund infrastructure organizations: for many infrastructure groups, WINGS offers the only chance to have that sort of conversation with their peers because they are the only infrastructure group in their country.
Manuel Arango, CEMEFI

Manuel Arango, the founder of CEMEFI, was in on the ground-floor of WINGS, so to speak. He was at the original meeting in Oaxaca in 1995. Since, then he has seen the organization grow and develop, and opening the Mexico City Forum, it was he who first raised the importance of values, which was to become a theme of the conference. He tells Charles Keidan why.

At the beginning of the conference you said that ultimately, how we think about philanthropy comes down to the values we hold. Can you elaborate on what you meant?

First, of all, for me philanthropy is a very extensive concept, it’s civil society, non-profit organizations, whatever. This was at the heart of our thinking when we started the Mexican Centre for Philanthropy (CEMEFI) and a big part of it is the concept of providers, of people donating the most important thing in life which is their time, because that you cannot replenish. So for us the concept of philanthropy was to move Mexican citizens to adopt this view that we are all part of the environment in which we live, that we are all must take care of that environment, natural and social.

I say let’s go back to something very simple which was there at the very beginning; if we can really educate people with values, if we all felt that we are responsible for the world that we live in, whether you’re in business or you’re a politician, we certainly would have a better world. So I’m going back to the essence of everything, Generosity, empathy, all these words make a good citizen and a good citizen makes a good country.

Are there good citizens amongst Mexico’s most wealthy people contributing those values or do you think they could and should be doing more?

That’s another thing that I’ve learned. At first, I was desperate because I thought that things could be accomplished at a much faster pace, and then you learn to be humble and to enjoy the small victories because things unfortunately take much longer that we would like.
Yes, in Mexico we are a long way from what we would like to be but if you go back a few years we have advanced tremendously. In CEMEFI we have created programs incrementally that have been very successful, like the Corporate Social Responsibility program. Money is really the easiest thing to contribute, but we wanted to contribute the talent of the corporations, the talent of the individual. We have worked very much with governments because governments don’t realize the potential of the citizens willing to be part of the solution. We have struggled and we continue to struggle to get them to give incentives for non-profit organizations. I believe that the non-profit world is the balance between government and business. Those are two powerful entities. You cannot say that the role of the citizen is just to vote and that’s it. Citizens have to be empowered.

You founded CEMEFI and you’ve seen the evolution of WINGS. How involved have you been in this process of trying to build a global philanthropy infrastructure?

The two main pillars in philanthropy are the grant-givers and the grant-seekers. The grant-givers are the ones who have the potential, with their money, to get ideas and projects started. The grant-seekers are the ones who have ideas, projects to provide services, but they don’t have the resources. So if you are able to make these two areas grow and communicate, the more grant-givers you have and the more good, well-organized projects from the grant-seekers, things starts to bloom. So I am very proud to be sitting in that room where I was ten minutes ago seeing, not only the amount, but the quality of the people who are there. Behind one of those people is the Ford Foundation, the Mott Foundation, organizations that have been operating for years and have had experience. WINGS also helps to reproduce similar initiatives and projects. It’s a growing sector and I think that the day comes where citizens are empowered, they have values, and the sector can finally be the link between market forces and government. If capital and business drives the world, it’s very serious because the more powerful you are, the more you can shape public policies. So we have to get involved not in helping people, but in attacking the problems that cause poverty or crime, or whatever. We have to change that, so we have to be able to shape policy.
Maria Chertok, WINGS Chair - Parting Reflections

How do you think the WINGS Forum went?

I think it went great. There was lots of enthusiasm in the room and the fact that the room was full for the final session is an indicator of great interest and engagement of the audience. I think the whole board is very pleased with the outcome.

What do you think captured people’s interest?

I think the most important thing is that the program was very different from previous ones. It was less technical and much more related to bigger issues and trends in philanthropy and in the world which I think made it more urgent and real for people.

The opening plenary on whether philanthropy is a friend of social justice certainly set the tone. What did you make of that rather dramatic session?

I liked it a lot, it was a great start. We had different perspectives present on the panel but I think we touched a nerve and managed to be less self-congratulating than usual for our sector, which was the whole idea behind the title of ‘Critical Philanthropy’. We wanted to challenge ourselves and the session worked towards that goal. The whole first day was an attempt to push the limits and see what friends are out there, what new collaborations we can make, and broaden the space for philanthropy.

Where did the impetus for challenging philanthropy come from?

This idea came very strongly from the board. We met a year before the Forum and put our heads together on how to make it speak about real issues and real challenges rather than just the craft of being a good infrastructure organization.
The Declaration at the end of the Forum emphasized the importance of building bridges and also of helping vulnerable, marginalized groups. Who put that together?

It was the board’s idea, particularly of our American members who are obviously very concerned with the situation. Some members stayed up very late on the previous night to draft it.

What were your thoughts on the speech by Doug Rutzen who won the IMAGine Award. Were you expecting such a powerful call to action?

One of the ways this Forum was different from previous ones was that suddenly our partners, our members, our board members from countries with very established philanthropic cultures felt themselves under threat and this new situation emphasized the unity of this group. We are all in the same boat now and we need to work together on a better environment for philanthropy. Doug expressed this really well.

Speaking of working together, two sessions on the first day debated the relationship between civil society and business. What did you take away from them?

I think the positions in the first session whether this or that statement about the relationship was a myth or a fact were slightly artificial. We could have focused more on philanthropy infrastructure rather than just on the general idea that business has become more philanthropic and non-profits have become more business oriented. As far as the second session on how companies defend civic space, I thought it was a mini-breakthrough in our understanding of the potential collaboration with business sector can bring.

Why was that?

We underestimate the potential of partnership with the private sector. We tend to think that companies pay lip service to social responsibility and only care about profits and shareholder value. CAF’s case studies tell a different story which shows that the private sector is prepared to take radical steps to safeguard the freedoms of civil society. I think this is very reassuring and we should look more for unusual suspects that could help us build an enabling environment for civil society.
The WINGS Forum is heading next to Nairobi in 2020. Why did you pick Nairobi and what can we expect?

WINGS Forum has been to most parts of the world now including Australia, and only Africa was missing. The philanthropic culture in Africa is vibrant and has a lot to offer in terms of new experience and out-of-the-box thinking. Also, infrastructure in Africa is growing rapidly and that is why WINGS approached our African colleagues to see if they would be willing to host the next Forum, and we are very happy that they are. We hope that the Forum will be hosted by a consortium of our African members rather than just the African Philanthropy Network, as it would advance WINGS’ mission to strengthen collaboration and build links within the sector. The fact that the African delegation all danced together on stage at the closing session in Mexico suggests these expectations are well grounded.
WINGSForum 2017 Committees

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Francis Kiwanga, the Foundation for Civil Society, Tanzania.
‘There have been a lot of sessions designed on the learning and the infrastructure which is really poweful...Overall, a very good conference.’
Aknowledgements:

WINGS Staff:

Benjamin Bellegy; Executive Director, Brazil
Jasmine Boeri; WINGSForum Coordinator, Brazil
Sarah-Brown Campello; Membership and Development Coordinator, Brazil
Julia Jezierski Catani; Programs Assistant, Brazil
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Conference Documentation
Andrew Milner, Alliance Publishing Trust (United Kingdom)
Charles Keidan, Alliance Publishing Trust (United Kingdom)
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