



# **WINGSForum 2006**

## **Making a Difference in Philanthropy**

### **CONFERENCE REPORT**

**Bangkok, Thailand - 16 to 18 November 2006**

Worldwide Initiatives for Grantmaker Support (WINGS) is a global network of more than 135 membership associations and support organisations serving grantmakers.

WINGS convenes *WINGSForum*, a global meeting, every three or four years to convene grantmaker associations and support organisations to open a dialogue, to increase knowledge, and to build connections.



McLean Budden has generously sponsored the preparation and dissemination of the *WINGSForum* 2006 reports.

**CONFERENCE REPORT 2006**

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## Making a Difference in Philanthropy

Although the WINGS network is relatively young, it has become established as an important element in a global network of participants. WINGS focuses on strengthening participants' awareness of organisations that support grantmakers thus providing the grantmakers with opportunities to demonstrate good practice and become familiar with each other's work. WINGS is also establishing international relationships that will be sustained - principally electronically - over the following few years.

The WINGS network was established in 1998 during a meeting in Oaxaca, Mexico, and the title *WINGSForum* was applied at a subsequent event in 2002 in Sydney, Australia. *WINGSForum 2006* was held in Bangkok to mark the imminent move of the WINGS Secretariat to South East Asia.

*WINGSForum 2006* attracted 50% more participants than the Sydney event and was accompanied by extensive satellite meetings between two specialised constituencies within the WINGS network: these worked on the promotion, development and support of community foundations and corporate giving.

This report consists of the main speeches, workshop presentations, and discussions as well as a taste of the networking and social events. The many individuals and organisations who helped to make *WINGSForum 2006* possible are acknowledged at the end of the report.

Many of the speeches and presentations are available on the WINGS website: [www.wingsweb.org](http://www.wingsweb.org).

## Introduction to Thailand and Welcome Remarks

"Context" was a word that came up many times during *WINGSForum 2006* in Bangkok, and it was therefore fitting that the opening session provided an introduction to the culture and traditions of philanthropy in Thailand.

In her remarks, **Dr. Juree Vichit-Vadakan**, from the **Centre for Philanthropy and Civil Society**, said that, over the centuries, giving has been deeply ingrained in Thai society.

Most Thai giving is religiously motivated and is directed through Buddhist temples. Donations are traditionally intended for both temple maintenance and for the poor. Giving also serves as a social equalizer, a way for people from all walks of life to earn religious merit, to enhance their status, and to ensure the wellbeing of future generations. Furthermore, it provides a mechanism for building solidarity and strengthening social relationships through the intricate networks of mutual support that exist in Thailand.

In recent years, new channels for giving have begun to appear, in particular around the philanthropic work associated with Thailand's much-revered royal family. Charities with royal patrons are considered to be particularly trustworthy and benefit from high levels of public support. Such enthusiasm, however, does generally not extend to the NGO sector, which is still often regarded with distrust.

Another noteworthy development has been the emergence of new thinking on more responsible and strategic forms of philanthropy and, in particular, the role that temples can play in social development.

Political patronage has, in recent years, featured heavily in Thai philanthropy, resulting in giving that has been more concerned with exerting and obtaining political influence than philanthropy. For example, politicians may provide their constituents with transport for weddings and funerals in attempts to provide incentives for votes.

Meanwhile, at the national level, state coffers are often used to give “thanks in money” or to fund initiatives that enhance the government’s status. As Dr. Juree noted, such a top-down approach is not always welcome or sustainable because it can have a detrimental effect by weakening local initiatives.

**Khun Apirak Kosayodhin**, the **Governor of Bangkok**, welcomed WINGSForum delegates to the city. He gave a brief overview of the vision he and his team developed for Bangkok’s 5.5 million residents. The plan emphasises the city’s heritage and identity and promotes quality of life, a clean environment, and strong infrastructure.

## Keynote Speaker - Jaime Augusto Zobel de Ayala II

### *The Challenges of Asian Philanthropy in the 21st Century*

Keynote speaker **Jaime Augusto Zobel de Ayala II**, **Chairman and CEO** of the **Ayala Corporation**, opened his remarks with the words of a prayer from Archbishop Desmond Tutu:

*“Disturb us, O Lord, when we are too pleased with ourselves,  
When our dreams have become true because we dreamed too little;  
When we arrive in safety because we sailed too close to the shore.”*

Today’s world is struggling with enormous social problems of poverty, disease, ignorance, economic degradation, armed conflict, and social strife. It was, Mr Zobel said, the responsibility of every individual - whether in business, civil society, or government - to ward off complacency, “remain disturbed”, and to tackle these vast and complex problems.

The Millennium Development Goals were an example of how the world can unite around particular issues, but the scale of the challenge is unprecedented. The pace of change is relentless and powerful forces - global economic integration, changing demographics, and technological innovation - are shaping our future.

Philanthropy, he said, used to be something one did when one had accumulated or inherited great wealth and when there was a weaker ethical contract between business and society. Today, the sources of philanthropic wealth have changed and, at the same time, the ethical standards and moral expectations that govern the acquisition of the wealth that backs philanthropy have been considerably raised. Business is now expected to operate ethically in the market and the bar has been raised for corporate social responsibility; the notion of an implicit social contract between business and society is now commonplace, as is the idea that corporations should consider questions of social responsibility in terms of the impact of their business activities. In short, said Mr Zobel, “Within every sector of the economy, a moral struggle is raging”.

Rather than perceive these changing circumstances as a threat to profitability, forward-thinking companies are seeking new opportunities and new avenues of engagement with social problems and with different stake-holders. One growing area has been in the provision of goods and services to the poorer segments of society. Such activities were not normally considered commercially viable, because it was “doing business at the bottom of the pyramid”.

Another significant approach to increasing philanthropic activity while at the same time encouraging economic growth, has been to apply micro-finance principles. Micro-financing can create new wealth and production as demonstrated by the success of the Grameen Foundation in Bangladesh. Such

entrepreneurial activity gives people a stake in their own economic futures, and is a powerful tool for strengthening the social fabric of local communities. It also has a positive effect on peace-building, as happened in the Philippines when ex-combatants became involved in banana farming.

Mr Zobel outlined what he saw as the three main challenges to philanthropy. The first was the issue of scale relative to the magnitude of the problem. In Asia, in particular, the level of philanthropic resources is still low, both in terms of mobilization and foundation payouts. Systemic change will happen only when projects can extend beyond the pilot phase and be implemented at national level. In the Philippines, where resources are few and needs are great, corporate donors have worked together in capital intensive “social consortia” to implement nationwide projects, such as the installation of the Internet in schools.

Secondly, there is a need to expand the donor base for philanthropy, particularly in Asia where philanthropy has not yet “gone public”. Mass campaigns to raise awareness among citizens at home and among Diaspora groups would play an important role in this.

The third issue concerns the relationship between private sector philanthropy and the government. Philanthropy’s role is not to usurp government, but neither is it to let government off the hook. There is an important role for grantmaking foundations to play in getting involved in policy debates regarding their areas of concern, and to focus on deeper and better understanding of the root causes of social ills. In the end, it will be this improved understanding that will enhance the impact of our resources, probably even more than the addition of extra resources could hope to achieve.

In his closing comments, Mr Zobel made reference to the idea of the “moral imagination”, or our capacity to generate new creative ideas that are rooted in, and spring from, our moral sense of right and wrong. Business ideas that come from a strong moral sense will work, he said, because their proponents bring greater conviction. He called on philanthropic institutions to harness the discipline of business in analyzing social problems they seek to solve, while retaining the passion that sustains them.

◆ **The entire transcript for Mr Zobel’s speech is available from the WINGS website.**

## Plenary Speaker - Anuradha Mittal

### *The Role Philanthropy Can Play in Progressive Policy Making*

Introducing the plenary session on 17 November, Pavlína Kalousová of the **Czech Donors Forum**, proposed that the title of WINGSForum 2006, “Making a Difference in Philanthropy”, be pushed a little further to “Making a Difference through Philanthropy”.

In an increasingly complex world, we are facing new dilemmas that come with global market expansion, migration and human rights, and it is increasingly more difficult to make hard and fast distinctions between black and white, right and wrong. What is required, it seems, is not simply better ways of addressing such problems, but entirely new ways of thinking of such problems. Against this background, she said, grantmaker associations and support organisations should be seeking to promote creative ways to address the new reality that surrounds us and to take on the role of “sensible hubs” that are open to this new complex reality.

In her speech, plenary speaker **Anuradha Mittal, Executive Director** of the **Oakland Institute**, explored the role of philanthropy in progressive policy making. She described the situation in the United States where, over the past four decades, conservative policy think tanks have seized the initiative in domestic and international social and economic policy arenas and the result has been growing

hunger and poverty and income inequalities at home and abroad. The rise of the Right, she said, had largely been due to its consistent investment in the development of ideas, organisations and intellectuals capable of articulating and defending their ideas. It had “out-organised, out-fought and out-thought liberal America as a unified force”.

Today’s world is filled with contradictions at every turn: global integration amidst ethnic division; a paradox of plenty amongst increasing hunger and poverty; a knowledge-based economy with failing public schools. The negative effects of supply-side economic policies coming out of Washington DC have made themselves felt around the world. Few sectors of the economy have benefited from free trade agreements such as NAFTA. In Mexico, for example, family farmers have been unable to compete with government-subsidized US imports of corn: many have been forced off the land, amidst falling wages and rising inequality. At the same time, US foreign aid to the developing world has had a detrimental effect on local farmers. Its insistence on sending in-kind food aid does little to strengthen national economies and destroys markets and the livelihoods of small farmers in recipient countries: and yet, these are the very farmers who should be at the centre of development policies.

The “new” Green Revolution that the Bill and Melinda Gates and Rockefeller Foundations were bringing to Africa, said Ms Mittal, failed to acknowledge either the causes of hunger and poverty in Africa, or the failure of the first Green Revolution. The likely results of this “\$150 million altruistic offensive” would probably be higher profits for the seed and fertilizer industries, negligible impact on total food production and worsening exclusion and marginalisation in the countryside.

Public policy priorities have been shaped largely by conservative foundations in recent years, which have advocated for a right-wing political agenda. Their success, said Ms Mittal, has been largely due to the way that conservative funders pay meticulous attention to the entire production process, investing in a “conveyor belt” that stretches from policy think tanks, to service providers to grassroots activists. Reclaiming the high ground in the battle of ideas requires at least five elements:

1. moving the overall political environment
2. issue-based advocacy and lobbying
3. organising and empowerment
4. community development, and
5. service delivery.

Without changing the political environment, an emphasis on service delivery “is a recipe for sliding backwards”. Micro-credit schemes, for example, are frequently presented as a “painless approach to development” but as long as they exist within structures that perpetuate inequality (such as concentrated land ownership) they will never be anything more than a survival strategy, and not a key to development. Progressive think tanks and foundations, then, face the challenge of how to focus their efforts at shifting the overall political environment. A renewed partnership between civil society and foundations will require that grantmakers understand the importance of ideology, help to build institutions by providing ample operating support, support multiple social change strategies including advocacy and constituency mobilisation, and take a long haul approach.

In closing, Ms Mittal reaffirmed her belief that a better world was possible, grounded in international treaties and agreements, and based on self-determination, sovereignty and democracy. The challenges that lay ahead may seem awesome and formidable and would require “the legs of a marathon runner”.



She finished with the words of Sufi poet, Hafiz:

*“Fear is the cheapest room in the house. My dear, you deserve better living conditions.”*

◆ **The entire transcript for Ms Mittal’s speech is available from the WINGS website (in English and Spanish).**

## Barry Gaberman Lecture on Global Philanthropy

### *The Status of Global Philanthropy*

An important new element of WINGSForum 2006 – and to be a feature in all subsequent WINGSForums – is the **Barry Gaberman Lecture on Global Philanthropy**. The Lecture was established by WINGS to honour one of its key founders and its first Chair, Barry Gaberman, who had recently retired as Senior Vice-President of the Ford Foundation.

WINGS has created a fund to raise money to support WINGSForum events and to assist in producing future global gatherings. Dozens of donors, mostly individuals and foundations who have benefited from Barry’s wisdom and experience and recognise his contribution to the international field of grant-making, have contributed to this fund.

This first lecture, given by Barry Gaberman himself, was supported by the **Ayala Foundation** and the **Charles Stewart Mott Foundation**.

The emerging infrastructure for international philanthropy, said Barry Gaberman, should not be seen as an end in itself, but rather as a way to enhance civil society as a whole. The term civil society has meant different things by different thinkers ranging from Plato to Robert Putnam, and although definitions vary, when it comes to civil society organisations, “we know them when we see them”.

Generally, organisations associated with civil society build social capital and represent an important form of “soft power”. Such organisations help to prevent a regression into authoritarianism by adding a layer of protection against the abuse of power.

For their part, organisations involved in individual giving and organised grantmaking represent the building blocks of a strong civil society, while philanthropy means securing private wealth for the public good.

Philanthropy is by no means a Western concept and each society puts its own particular stamp on it. While philanthropy can be both parochial and charitable, it can also be strategic and developmental. Today, we are seeing changes in traditional forms of family and corporate philanthropy with the emergence of new forms and the revival of old ones.

Accountability in philanthropy is essential, whether at the level of the state, which can enforce compliance, at the level of civil society, where publications such as the *Chronicle of Philanthropy* have played an important role, or at the level of individual institutions.

Transparency, however, can be tricky particularly in regions where organisations must operate in hostile environment.

In a question and answer session following the Lecture, Barry was asked about the challenges of sustaining infrastructure organisations. The answer is always very “contextual”, he said, and some subsidy will always be needed. In developing countries, this will often come from outside because local philanthropic resources are not ready to take on the task.

◆ **The entire transcript for Barry Gaberman’s speech is available from the WINGS website.**



## WINGS Business Session

The WINGS “business” session on the last day of WINGSForum consisted, in part, of a report describing WINGS’ activity during the Secretariat’s four-year stay in Brussels (2003 – 2006).

Questions and suggestions were raised concerning WINGS’ future direction and role during its four-year tenure in Manila (2007 – 2010) where it will be hosted by the Asia Pacific Philanthropy Consortium.

Participants were invited to discuss their concerns and ideas in small groups and key points were reported back in plenary. These included:

- Areas in which WINGS could take on a greater leadership role, such as in promoting the idea of “A Year of International Giving”, encouraging the teaching of philanthropy at school, and improving the visibility of philanthropy at an international level.
- Suggestions for programme development, such as focusing on the issue of financial sustainability for grantmaker support organisations, the introduction of a new track for policy research, and gathering qualitative data on network members.
- The question of network expansion, including the creation of a role for corporate members and other donor service organisations (such as private wealth advisers).
- The implications of the relocation of the WINGS Secretariat to Manila in terms of developing an Asian perspective in its work, as well as the management implications of uprooting and changing staff every four years.
- For a global network, maximising the exchange of learning between different parts of the world while recognising the importance of local context, and acknowledging the importance of language and terminology as a way of creating deeper understanding rather than obscuring it.

## Concurrent Sessions

- ◆ **Speaking notes and presentations for many of the concurrent sessions held at WINGSForum 2006 are available from the WINGS website.**

## Track 1: Organisational Capacity Building and Sustainability

### Building a Sustainable Knowledge Management System for the Philanthropic Sector

This session discussed new interactive technologies and explored ways that grantmaker associations could take advantage of them to enhance support and promote peer learning and information exchange among their members.

For a grantmaker support organisation, a strong knowledge management strategy is closely connected with good relationship management with members.

The decision by the **Forum of Regional Associations of Grantmakers** to evaluate its knowledge management procedures was prompted by the realisation that it was not taking advantage of the enormous information resources at its disposal. The website was hard to navigate and membership details were frequently outdated. For its part, the Forum lacked the necessary in-house resources to maintain and regularly update the website.

The evaluation was successful and the Forum now boasts a well-designed and easily navigable website. Members can now share resources across the network through a fully integrated knowledge management system - all at an affordable cost. The system, which is managed in-house, allows members across a broad geographic spectrum to share and post information as well as to participate in “webinars”, teleconferences and listservs.

In Brazil, organized philanthropy is still relatively undeveloped. **Grupo de Institutos, Fundações e Empresas** (GIFE) plays an important leadership role in developing the sector, which is reflected in its knowledge management strategy. The strategy has multiple target audiences including members, government, and the general public. GIFE applies various strategies including printed newsletters, electronic bulletins, and its website - 30,000 hits a month! - as well as meetings, conferences and management courses.

Both presenters talked about the importance of employing clearly defined terminology in their knowledge management strategies (for example, GIFE has developed its own typology to encourage members to give more strategically).

The two presenters also advised on the importance of using simple, non-academic language on websites rather than jargon, and underlined the importance of developing in-house expertise for website maintenance.

### **Sustainability and Growth: Ensuring the Future Viability of Grantmaker Support Organisations**

The recent closure of the **Southern Africa Grantmakers Association** (SAGA) was the starting point for the session on *Sustainability and Growth: Ensuring the Future Viability of Grantmaker Support Organisations*. Panel members were invited to discuss what factors might have led to SAGA's demise. Most of the comments related to issues that are only too familiar to other grantmaker associations operating in regions where philanthropy remains relatively undeveloped.

One factor was the fundamental challenge of reconciling the often diverse interests of corporate and non-corporate members (SAGA's membership was heavily corporate). Another consideration was the fact that SAGA's members – and perhaps even its board - did not share or support the association's overall mission. A weak client base consisting of members who were reluctant, or unable, to pay for services, was also mentioned. Such an environment resulted in the association being financially vulnerable and over-reliant on a handful of international donors.

Panellists then discussed the key challenges facing their own organisations, particularly sustainability. Like SAGA, many associations depend heavily on grants from international donors, which can create a false sense of security. Associations need to assemble a funding base consisting of a healthy mix of membership fees, services, and grants. To this end, the associations need to improve their ability to judge the donor environment, and to be able to diversify their programmes in accordance with membership needs.

In SAGA's case, membership fees constituted only 2% of its overall income and, judging from other associations represented in the room, this situation is not uncommon. However, when income from membership fees is so low, it tends to undermine the sense of ownership among members and weaken the associations' accountability to members.

Another challenge for grantmaker associations was the difficulty in striking a balance between providing services to members and taking a leadership role in sector-wide issues.

And finally, the role of leadership cannot be overemphasised. An association needs a board of directors, a CEO, and staff members who believe in the mission. Frequent changes in these positions can be disruptive and very destabilising.

## Governance and Board Development

Two main points were discussed during the session on *Governance and Board Development*. The first concerned the challenge of developing a board of directors in an environment without a culture of good governance, transparency and accountability. Monica Mutuku of the **East Africa Association of Grantmakers** observed that an emerging democracy such as Kenya, changes in governance are not always welcome and are often perceived as factors that undermine traditional ways.

Two other perceptions frequently held in Kenya were:

1. that a weak board of directors was preferable because it would pose fewer problems to a CEO, i.e. “be less of a nuisance”; and
2. that persuading good people to join your board was sufficient in itself to guarantee a good board. Arriving at a situation where a board is engaged, aware of its responsibilities and willing to commit time (and money!) requires a big investment of time and effort.

It is important to have policies and procedures in place for all eventualities because, without a culture of “good governance” and established philanthropic norms and values, nothing should be taken for granted.

The concept of board appraisal is particularly tricky when there is very little local precedent for it; an enlightened governance committee can help relieve the CEO of this tricky task.

The second main topic of discussion concerned ways of creating a dynamic and productive board of directors in circumstances where the “rules” of governance are not well established. Martin Lehfeldt, from the **Southeastern Council on Foundations** (US), talked about the importance of having diverse sets of skills within a board to build a winning team: “You can’t just recruit strikers. You need a goalie, a defence, and you need to designate a captain”.

Retreats were an excellent means of energising a board and of getting their input. Sub-committees which met a couple of times a year were also an effective way of keeping board members engaged with the work of the association. It is sometimes easy to overlook the role that board members play as ambassadors for an organisation, and undervalue the positive effect that can result when board members touch base from time to time with member organisations. The “people” side of organisational management can also help to alleviate tensions and disagreements that arise in the boardroom; informal social gatherings of board members are a good way to strengthen social relationships and defuse any tensions that may have been brewing.

During the discussions, the problem of **board costs and stipends** arose. The nature of such expenditures can be awkward to deal with, particularly when trying to balance the board’s desire for diversity against the necessity of blocking the appointment of potentially ineffective individuals who join for the wrong reasons.

The problem of how to **dismiss ineffective board members** was also discussed and various suggestions were considered. Fixed terms were mentioned as a means of easing ineffective board members out the door - if not sooner, at least later; an attendance rule would result in automatic dismissal for members who miss three consecutive board meetings.

The most effective strategy mentioned could not, however, be adopted as a policy per se. The plan suggests that the CEO apply a measure of charm and diplomacy and persuade delinquent board members that it would be in everyone’s best interests if they would resign from the board.

Discussions about competing interests were very frank. Competing interests, it was agreed, can be a difficult issue for grantmaker associations to discuss internally. What became clear was that conflicting or competing interests can arise within and around grantmaker associations, regardless of their stage of development.

In regions where the philanthropic sector is still relatively small or undeveloped, problems can arise when an association's membership, which is usually small, expands to include larger, established, and endowed foundations as well as younger, fundraising foundations. With such a mixed membership base, an association can find it difficult to develop a common agenda, while resisting requests from the bigger, wealthier organisations to give them greater influence. Similarly, when an association has both grantmaking and grant seeking institutions among its members, tensions can arise around competition for funding - and they can be further complicated when the association is itself a grantee of one of its members.

For grantmaker associations operating in a more developed philanthropic landscape, differences between the needs of different kinds of members can still pose a challenge. C.J. Callen of **Northern California Grantmakers** described the "Four Ls" that drive her association's work: "Lead, Learn, Leverage and Lift". Managing a membership association, she said, is all about the push and pull and power dynamics which are constantly changing; managing relationships with members is the key to solving issues of conflict or competition.

## Track 2: Raising Awareness / Communicating About the Field

### Bridging and Building Indigenous-focused Philanthropy

Funding for indigenous people was discussed for the first time at a WINGS meeting in the session on *Bridging and Building Indigenous-focused Philanthropy*. Evelyn Arce-White of **International Funders for Indigenous Peoples (US)**, who had done an excellent job of marketing the session, spoke with great passion to a filled room about the plight of this "invisible population".

Some 300 million indigenous people - the world's largest minority - are scattered around the world in some 90 countries. They live in about 5,000 groups and speak some 4,000 different languages.

The lifestyles of many indigenous people is under great pressure. Vast natural resources in many of their territories have been frequently exploited with little consultation or compensation. More recently, the effects of global climate change have begun to effect their ancient way of life.

When the discussion turned to the funding of indigenous peoples, several issues arose. One was the incompatibility of the holistic world-view of indigenous peoples with the normally rigid structures and very specific programmes of most grantmakers.

Another issue concerned time horizons. Funding for indigenous peoples often requires an understanding of the long timelines required for full consultation - especially with elders - to achieve the transfer of skills and knowledge. The Christensen Fund is one of the few funders with programmes to support indigenous peoples. The Fund promotes a bottom-up approach in its work, with programmes based strongly around locally articulated community needs.

Because issues of capacity and accountability at the local level can often arise, the Fund also provides technical assistance support in addition to grant funding. The Fund also overcomes the problem of requiring 501(c)(3) equivalency through its use of "expenditure responsibility groups".

In the ensuing discussion, there was some reflection on mainstream philanthropy's responsibility towards such groups. It was suggested that foundations need to ensure that programmes designed to promote, say for example, eco-tourism, do not have detrimental effects on local indigenous populations.

One foundation representative observed that funders can sometimes get so preoccupied with their own rigid or bureaucratic systems that they fail those groups that fall outside conventional categories. "As funders," she observed, "we should be ready to go out of our way to break the barriers that we have set for ourselves."

One of the most challenging areas of discussion concerned the definition of "indigenous" in the context of the Middle East and the position of Palestinian people.

### Engaging New Wealth in Philanthropy

This session looked at emerging giving patterns and trends in the fast-growing economies of Russia, India and Brazil. Russia has seen a dramatic shift in sources of funding for social causes in the last ten years. Foreign donor support is now dwarfed by the recent and significant emergence of Russian corporate and private philanthropy, which is estimated to be worth the equivalent of US\$1.5 billion. While corporate giving is publicised, private philanthropy – the domain of the most wealthy – tends to have a very low profile. Public and media attitudes towards Russia's new wealth are often very negative and most Russian philanthropists are extremely wary of government scrutiny of their giving.

Although the roots of India's voluntary sector and its overall giving culture are quite different from that of Russia, members of its rapidly growing "millionaires' club" face many of the same barriers to giving. Although in Russia, the value-base of philanthropy is still under development and open to question because it represents such a dramatic departure from Soviet times, in both India and Russia, the legal and tax structures are either inadequate or not conducive to giving. There is also a lack of information about the various means of giving as well as credible partner organisations.

The rapid emergence of high-net-worth individuals in Russia, India, and Brazil clearly presents new opportunities for philanthropic giving if it can be successfully harnessed. The Russian Donors' Forum, for example, provides donor support services, particularly in the area of promoting philanthropic values, dialogue with the government and public and professional training programmes.

In India, banks have already begun to provide services to wealthy individuals and families. In Brazil, where most of the country's wealth is concentrated in a few families, the **Institute for the Development of Social Investment (IDIS)** sees its role as giving purpose to its clients' wealth, through "conviction, convenience and coercion". It targets its services in four main client categories ranging from new wealth to experienced philanthropists with established wealth. Clients in the first category – in all three countries - seek projects that are entrepreneurial and processes that are transparent and accountable.

### Best Practice / Examples of Corporate Giving

This session looked at the role associations can play in promoting Corporate Social Responsibility (CSR). Chit Juan of the **League of Corporate Foundations (LCF)** in the Philippines outlined two distinct roles. First, the League provides annual programmes (seminars, etc) for its members that explore different issues in implementing CSR. Second, the League is also involved with the Figaro Foundation (the civic arm of the Figaro Coffee Company), which aims to help save the ailing Philippine coffee industry.



Ms. Juan showcased the Figaro Foundation (of which she is Executive Director), an LCF member, as a concrete example of Corporate Social Responsibility. The Foundation re-established the popularity of a variety of coffee, traditionally grown in the Philippines but recently neglected, to demonstrate how a company can act in a socially responsible way.

The **Czech Donors Forum** divides its members into corporate and non-corporate to reflect their different interests. The Forum offers corporate members a Club, a system of measurement, volunteering and cause-related marketing. The Donors Message Service, which was launched in 2004 through a collaboration with the major mobile telephone providers, has raised the equivalent of more than US \$6 million. The money is intended for specific charities and causes and represents a good example of companies taking a fresh approach by working together and finding ways to give (in this case, mainly through reduced charges) that work in conjunction with their business.

In discussion, various possible roles for associations emerged: brokering introductions between corporate and potential partner organisations for a fee, performing due diligence for corporations (a service already provided by **Charities Aid Foundation** - CAF), helping with measuring and benchmarking, and establishing the nature of the “competition”. Throughout the session, strong emphasis was placed on return on investment.

### Learning to Give: Teaching Philanthropy in School

“The habits you develop in your first year[s] are the habits you’ll have when you are 90.” It is this philosophy that underlies the *Learning to Give* (LTG) programme in the United States, and the **Beautiful Foundation’s** Na-num-gyo-yuk in South Korea. Both were presented in the session, *Learning to Give: Teaching Philanthropy in School*.

LTG was created in 1997 in conjunction with the **Council of Michigan Foundations** and a steering committee of educationalists (specialists in the theory of education) and practitioners from the non-profit sector. The LTG programme, established because of a sharp decline in civic engagement in the US, seeks to educate school children about the non-profit sector, and get them engaged in civic activities. The programme was designed to be incorporated into the curriculum (specifically, in the social studies curriculum), rather than treated as an “add-on”. There are now over 230,000 children taking the programme.

The LTG website has been a very important tool in disseminating resources; over 190,000 users - 22% of which are outside the United States - download material each month. LTG has also developed a definition of philanthropy which can be easily understood by children: “Giving time, talent and treasure and taking action for the common good”.

It was a similar concern over a deterioration of civic values in Korea and a worry that children were being brought up in an excessively materialist world that valued individualism over community that led the Beautiful Foundation to develop its Na-num-gyo-yuk programme for similar reasons.

On a visit to the United States, a staff member of the Beautiful Foundation was impressed by the LTG programme and recognized that, allowing for the somewhat different context in Korea, some of the content could be transferred. The programme, which has now been running since 2004, includes camps for students and summer “institutes” for teachers in which they learn how to teach philanthropy in the schools.



Initially, it was necessary to advertise to attract teachers to participate in the programme, but now there is a dedicated corps of teacher-advocates. A series of animations has also been developed to accompany stories of giving which can be found on the LTG website ([www.learningtogive.org](http://www.learningtogive.org)).

There was a general consensus that children should be introduced to the idea of giving as early as possible, starting with simple ideas and concepts, such as “penny drives”.

### Emerging Patterns Within “New Philanthropy”

Judging from the show of hands at the start of the session on *Emerging Patterns within New Philanthropy*, “venture” or “new” philanthropy is frequently greeted with uncertainty within more mainstream philanthropic circles. Introducing the session, John Harvey of Grantmakers Without Borders, a self-confessed sceptic, expressed some of his own doubts about “new philanthropy” as nothing new at all, its application of a business culture as too much out of synch with the values and practices of the non-profit sector, and finally, as conveying a certain arrogance.

Rising to the challenge of such an introduction, the three panellists were invited to describe their own involvement in venture philanthropy. Peter Hero (**Community Foundation Silicon Valley**) and Ruth Jones (**Social Venture Partners International**) described some of the very specific attributes of the individuals with whom they work, mostly in the United States. Their style of giving marks a significant departure from the more conventional, long-term “endowment” mindset of the wealthy.

These “new philanthropists” are generally younger than the average US donor; indeed, most are still in employment. For many, the most significant influence on their giving is the workplace. These people take a highly engaged, investment approach to their giving (Social Venture Partners, for example, offer time and skills in addition to money), are keen to develop new models and strategies (such as programme-related investments, loans and micro-credit in addition to grants), and seek particularly high levels of transparency and accountability.

The globalisation of philanthropy, particularly in corporate giving through local intermediaries, has increased the potential for greater amounts of money to be given internationally. For a community foundation such as Silicon Valley, however, it also poses the challenge of how to balance its function as a local foundation with its engagement at the international level. Over the long term, however, it was probably a wise decision to support their donors’ international interests today with the view that, over time, their giving interests would return closer to home (and probably in the form of endowment).

In Europe, according to Rob John of the **Skoll Centre for Social Entrepreneurship** and **European Venture Philanthropy Association** (UK), the emergence of venture philanthropy since 2000 has been a much more collaborative and networked process than its somewhat brash, poorly marketed and confrontational evolution in the United States in the 1990s.

In discussion, a concern was expressed that the potential for learning from the relationship between venture philanthropy and good, strategic, highly-engaged “traditional” philanthropy was endangered if venture philanthropy was defined too loosely to emphasize the contrast with mainstream philanthropy.

Several questions were raised about impact and measuring results. It was acknowledged that one challenge is to reconcile the chasm between a for-profit approach based on numbers and a non-profit approach based on additional factors. Venture philanthropy plays an important role here because it bridges these two worlds.

## Track 3: Developing an Enabling Environment

### Building Capacity for Public Policy and Government Relations

The panellists in this session came from grantmaker associations operating in quite different environments. The framework for public policy work in the United States, for example is well established. Each year, the **Donors Forum of Chicago** develops a federal policy agenda based on six public policy principles. The environment in which the **Russian Donors Forum** performs public policy work remains difficult.

Panellists from Russia, Philippines, the United States and Turkey were each asked to list the main challenges to public policy work for the non-profit sector in their respective countries. In regions in which the philanthropic sector is still emerging and the legal framework is poorly developed, it can be hard to overcome the suspicions of government officials who are often ill-informed about the sector. Another challenge in this context is a lack of legal and technical expertise and specialized knowledge; it can be difficult and very time-consuming for the staff of small grantmaker associations to educate themselves and keep on top of legal complexities.

When it came to advice on how to approach public policy work, some key recommendations were made. Evidence and analysis in the form of reports and other research material provide an important means of overcoming ignorance and raising awareness among government officials. Building and maintaining working relationships with government are extremely important and should include regular meetings rather than only during times of crisis or need. Forming and joining coalitions and networks are also important, not least because they remove the focus from any single organisation. While it is important that associations keep their members informed, it is also worth noting that not all members want to be associated with policy work.

### Can a Grantmaker Support Organisation Help to Create a Movement?

In this session Pavlína Kalousová described some of the experiences of the **Czech Donors Forum** (CDF) in “taking a stand” on particular issues. In one instance, CDF had spoken out against malpractice by corporate figures who were funding personal expenses through their charitable organisations. CDF took a stance on this matter because it was morally wrong and completely at odds with the kind of systemic change that CDF wants to see, and because such practices tarnish the image of corporate philanthropy - including CDF members. As a membership organisation, CDF gains strength and influence from the profiles and good names of its members, but in turn, it must accept that it cannot take too radical a stance or be too outspoken if it goes beyond the interests of its members.

When **Community Foundations of Canada** (CFC) turned its focus to social justice philanthropy, it described one of its approaches that had an academic angle; two staff members took MBAs in non-profit leadership. At the same time, CFC began to explore the idea of social justice philanthropy with its members and increasingly directed its grantmaking work towards social change. CFC’s social justice work has been rooted firmly in the context of recent social and economic changes in Canada, in particular around poverty among indigenous populations, and the situation of “new Canadians”, the country’s immigrant population. In the development of its social justice work, CFC has drawn heavily from beyond Canada for experience and learning, has invested in research and publications to “make the case”, and has built on the efforts of members who are leading the way in social change work.

### Supporting Community Philanthropy: Nationally, Trans-nationally and Globally

In this session strategies for developing an infrastructure for community philanthropy were discussed and participants learned about experiences arising from two very different contexts - Canada and Kenya.

It was generally agreed that external funders, as a fundamental part of civil society and civic action, can be helpful in developing community philanthropy. However, any intervention must be managed with care. Community philanthropy is not synonymous with community foundations and there was some discussion as to the kinds of support that could be appropriately provided. For example, it is a challenge to strengthen communities to ensure they are capable of receiving and managing the proffered financial support. This means that proposed structures and forms should match existing community structures.

A deep understanding of context and of existing community structures is imperative if efforts to build community foundations are to be successful. Around the world, effectively functioning and locally rooted community foundations are shaped and bound entirely by context. Community foundations have taken root in post-socialist societies in Eastern Europe and Russia, for example, because of the empty space left by the retreating state.

Suggestions were made on how to better equip the current infrastructure to support community philanthropy. It was suggested that a global ombudsman could be an honest liaison between external funders and local cultures.

### External Communication Strategies and Tools

This session began with a presentation on work that **GIFE** has undertaken in communicating with the Brazilian media. A workshop, consisting of foundation communication officers and representatives from both the mass and specialized media in Brazil, found that different social actors needed to be specifically targeted in appropriate and different ways. Specific guidelines were also developed for corporate donors, communications officers, media and others in attempts to bridge communications gaps that often exist.

There then followed a lively discussion about why the mainstream media tend not to cover the work of the philanthropic sector. The usual grievance against the media is their reluctance to cover positive, “good news” stories. But perhaps foundations should be asking themselves more rigorously what would be of wider interest in their stories. As readers of newspapers and television viewers ourselves, do we enjoy reading or hearing about “good news” stories? Caroline Hartnell of **Alliance Magazine** (UK) suggested that frequently, the material that foundations and non-profits write describing themselves can be very boring. “We tend to think that because we’re doing good, what we do is necessarily interesting.”

Although there was a general agreement that it would be useful for journalists to have a better understanding of what philanthropy is and what grantmakers can, and have, achieved, it is probably a greater priority for foundations to learn how to communicate what they do in more interesting ways. An example of one such approach was a **German Marshall Fund** meeting in Brussels where panellists perched on high stools and were interrogated by journalists. This meeting did attract press coverage simply because the format was engaging and stimulating.

The session ended with a film made about the **East Tennessee Community Foundation** and **Kenya Community Development Foundation** as an example of a communication “tool”.

### Working with Government / Partnerships with Government

This session began with a look at the current state of philanthropy and relations with government in two countries which both have long established philanthropic traditions, the United Kingdom and United States.

David Kenworthy described the relationship between government and the non-profit sector in the UK as positive, where the government is keen to emphasise the importance of the independence of the sector and the role of private giving. For an organisation such as **Community Foundation Network**, there are many opportunities to participate in government consultation and be involved in developing legislation. Additionally, the fact that the government is a major funder of the non-profit sector - more than half the funding handled by UK community foundations is public money - has led to concerns about an unhealthy reliance on state funding and the perception that community foundations are government appendages.

In the United States, said Steve Gunderson of the **Council on Foundations**, governments have recently shown increased interest in foundations, both positive and negative; the sector was waiting to see what impact the mid-term elections [in November 2006] would have.

Whatever the country context, the philanthropic sector needs to be active in negotiating partnerships with government. At the same time, it needs to be ready and able to take a stand when Government policies pose a threat to the common good.

It was pointed out that the political situation in Russia now means that it is very difficult to even begin discussions about partnerships between government and the philanthropic sector. The “Orange Revolution” in Ukraine was widely perceived in Russia as having been instigated and supported by foreign donor institutions. Philanthropy is now seen by Russia as a potential tool for political change and this has led to tough new legislation that regulates the activities of both international and local foundations in Russia.

## Track 4: Accountability and Effectiveness

### Getting to Good Policy: a Practical Guide for Foundations

This session explored the role of grantmaker associations in providing guidance and examples of good practice for their members. At a time when the context in which foundations work has become more and more complex - greater regulation, demands for greater accountability, and sophisticated donors seeking a wider range of giving vehicles – good policy has taken on greater importance for associations.

A new manual, *Policy Guidelines and Template*, is the work of **Community Foundations of Canada** and was developed over a 15-month period. It drew on a taskforce of members and other advisers. The tool is tailored to the policy needs of community foundations at different development stages.

In its policy work, the **Connecticut Council for Philanthropy** provides guidance on four key areas: governance, values, relationships with others, and administration and finance.

Support organisations are not the only ones offering management and policy skills to the foundation sector. In Australia, the *Asia-Pacific Centre for Philanthropy and Social Investment* at Swinburne University of Technology also offers post-graduate programmes in philanthropy as well as social investment for foundation managers and advisers.

### Principles of Accountability for International Philanthropy: Collaboration, Learning and Member Service

A tool developed for international grantmakers through a joint initiative of the US **Council on Foundations** (COF) and the **European Foundation Centre** (EFC), provided the basis for discussion in *Principles of Accountability for International Philanthropy*. Panellists Janet Mawiyoo (**Kenya Community Development Foundation**) and Noshir Dadrawala (**Centre for the Advancement of Philanthropy**, India) were asked to respond to the draft document.

Janet thought that many of the guidelines for international grant makers in the document could be usefully applied to local grant makers such as her own organisation. She believes it is important that values and respect for cultural diversity extend well beyond mere written policies; staff members in grantmaker organisations should also practice them in their day-to-day work.

In India, Noshir Dadrawala observed, there has been a recent shift from the “charitable model” of the benevolent giver to a more strategic and responsible type of giving. However, the idea of grant maker transparency and accountability is new and is the source of “queasiness” and discomfort for many local donors. The *COF/EFC Principles of Accountability* represents an advanced document, i.e. “a PhD thesis for a region that is still an undergraduate”. However, it could serve as a very useful blueprint for the growing Indian philanthropic sector.

In discussion, it was suggested that the document could serve as a useful tool for *all* grantmaking, not just international giving. The value base it proposed demands much more from grantmakers than the ability to distribute money along thematic parameters. It was also acknowledged that it is sometimes difficult to maintain integrity on both sides of the grantmaker/grant recipient relationship: could grantmakers ask the same, for example, of those they funded?

### Implementing Grantmaker Principles: Self-assessment Tools

This session looked at various self-assessment tools that have been developed by grantmaker associations in the United States, the UK and Canada. For the **Forum of Regional Associations of Grantmakers** (US), the development of a self-assessment tool was the next logical step in a process which had begun around principles for foundation accountability. The tool provides a practical guide for turning principles into good practice. A three-level framework (from basic compliance, to good practice and then best practice) caters to staffed and unstaffed foundations.

In the UK, **Community Foundation Network** (CFN) has graduated from a simple checklist designed for new and emerging community foundations to a new 45-question tool. This tool was developed in response to members’ growing interest in self-assessment, and is intended to help community foundations reflect on, and plan for, all aspects of their work.

**Community Foundations of Canada** uses a tool called *Reflections* which was developed in response to members’ requests for a tool to review their organisations. It is an organisational assessment instrument for community foundations to assess their organisation, ground their strategic planning and identify professional development opportunities. The tool is a questionnaire but it also requires the services of an experienced facilitator to guide subsequent discussion.

In discussion, it was suggested that an interesting next step would be a consultation tool to be used by either the community served by the foundation, or with external stakeholders such as organisations whose applications had been rejected for funding. Finally, it was noted that these tools are for “reflecting”; any outcomes or conclusions would need to be backed up with hard data.

### Developing Grantmaker Principles / Standards

In this session the conversation turned to the leadership role that grantmaker associations can play both in setting standards and in ensuring good practice among their members and, particularly, in helping to develop nascent or emerging foundation sectors.

The **Minnesota Council on Foundations** pursued a three-year process in the development of principles and practices for grantmakers in the early 1990s. At the time, relations between grantmakers and grantseekers were strained: there was increased government oversight of foundation work, greater demands for increased accountability and transparency, and greater media scrutiny of how charitable resources were being used.



During the research process, testimony was sought from key audiences - including local non-profits, national critics, and representatives of other fields. The views and engagement of members were also sought. The principles were adopted as a condition of membership in 1996.

The Council plans to keep members aware of issues and to track the manner in which individual members use the Principles and Practices within their foundations, e.g. when foundations renew their Council membership. This process gives rise to certain challenges such as how to monitor members' behaviour, the subscription process, and how to handle complaints against individual members.

In Germany, the **Initiative Bürgerstiftungen's** *Ten Principles for Community Foundations* were developed in 2000 as a means of strengthening, in the absence of a strict legal definition, the identity of the nascent community foundation sector. The principles which describe the defining characteristics of a community foundation are non-binding but community foundations that fulfil all the criteria receive certain benefits - such as free participation in the Initiative's meetings and access to its website's member-only areas.

## Social Evenings

The highlight of the joint dinner for participants in the two satellite meetings, for WINGS-CF (the WINGS interest group devoted to community foundations) and WINGS-CI (the new WINGS interest group for corporate philanthropy), was probably the journey to Bussaracum Restaurant when a parade of tuk-tuks carried participants, masked against diesel fumes, two by two through the city. Despite all fears about Bangkok's heavy traffic, and perhaps thanks to a discreet Police escort, the tuk-tuks proved a fast and efficient method of transport.

The glamorous river terrace and Flow Restaurant at the Millennium Hilton Hotel provided the venue for the opening reception. Barry Gaberman introduced three speakers: Dr Paiboon Wattanasiritham, Government Minister of Social Development and Human Security; Dr Woraphat Arthayukti, Vice Chairman of Friendship to Community Foundation, Thailand; and Terry Farris of UBS Asia Pacific.

Khun Paiboon had only recently been appointed to his government position and had, before this appointment, given a lot of assistance to WINGSForum in his capacity as Chair of the Thai Fund Foundation. He talked about the special circumstances that saw Thailand under the rule of a military government and wondered if his Cabinet position was unique; he is charged with ensuring that the government provides security for the population in the form of protection from hunger, poverty and homelessness.

The networking dinner at Supatra River House was an evening of great food and great conversation, plus traditional Thai dance. To get to Supatra, WINGSForum participants embarked on decorated rice barges for some river sightseeing and a cocktail en route.

## Venue and Local Hosts

The conference was the first big event of its kind at the new Millennium Hilton Hotel in Bangkok and WINGS is grateful that all the promises made by hotel managers were fulfilled; the venue proved comfortable and efficient.

Our local hosts, from a range of organisations in the WINGS network and associated foundations, provided counsel on the Thai context, the choice of local speakers, and appropriate etiquette in a courteous and rather formal culture.



The Thai coup d'état occurred in the middle of our preparations and our hosts were frequently pressed into service to keep us abreast of developing circumstances and to reassure participants that all would be well.

## Funders

### *Primary Supporters*

#### **Ford Foundation**

The Ford Foundation is an independent, non-profit grantmaking organisation. For more than half a century it has been a resource for innovative people and institutions worldwide, guided by its goals of strengthening democratic values, reducing poverty and injustice, promoting international cooperation and advancing human achievement. With headquarters in New York, the foundation has offices in Africa, the Middle East, Asia, Latin America, and Russia.

#### **Charles Stewart Mott Foundation**

The Charles Stewart Mott Foundation is a private, grantmaking foundation based in Flint, Michigan, USA. It supports non-profit programs throughout the US and, on a limited geographic basis, internationally. Through its programmes of Civil Society, Environment, Flint Area and Pathways out of Poverty, and their more specific programme areas, the Foundation seeks to fulfil its mission of supporting efforts that promote a just, equitable and sustainable society. The Foundation has field offices in London, UK, and Johannesburg, South Africa.

*The Mott Foundation also jointly sponsored this year's **Barry Gaberman Lecture on Global Philanthropy**, with The Ayala Foundation.*

### *Key Supporters*

#### **American Express Company**

American Express Company is a leading global payments, network and travel company founded in 1850. The mission of American Express Philanthropy is to bring to life the American Express value of Good Citizenship by supporting diverse communities in ways that advance the company's business objectives and enhance its reputation with customers, business partners, employees and other stakeholders.

*The Foundation has been a supporter of each WINGS global meeting and has also contributed financially to the development of our WINGS-CI (corporate initiative) constituency. Their grant for WINGSForum 2006 has generously contributed to the WINGS-CI satellite meeting.*

#### **Ayala Foundation, Inc.**

The Ayala Foundation, Inc., founded in 1961, is one of the leading corporate foundations based in the Philippines. For over 40 years, the Ayala Foundation has been translating the Ayala group of companies' commitment to poverty eradication through meaningful programs in the areas of Education, Environment, Corporate Volunteerism, Corporate Social Responsibility, Arts and Culture. The foundation partners with private and public sectors to create synergy in its efforts to improve the Filipinos' quality of life.

*The Foundation is a long-term supporter of WINGS and jointly sponsored this year's **Barry Gaberman Lecture on Global Philanthropy**, with the Charles Stewart Mott Foundation.*

## Charities Aid Foundation (CAF)

CAF promotes and supports effective charitable giving in the UK and at its offices overseas in America, Brazil, Bulgaria, India, Russia and South Africa.

*CAF has made a collaborative grant to WINGS which has strengthened fundraising capacity and contributed to planning for the Secretariat's transition to Manila in 2007. A part of this grant contributed to the costs of evaluation of WINGSForum. In addition, CAF staff assisted in many aspects of planning for WINGSForum 2006, and CAF sponsored the joint dinner for those attending the two satellite meetings.*

## GraceKennedy Ltd

GraceKennedy Ltd is one of the Caribbean's largest and most dynamic corporate entities. The company started in Jamaica in 1922 as a small trading establishment and wharf founders. It has changed from a privately-owned enterprise to a public company, comprising a network of some 60 subsidiaries and associated companies across the Caribbean and in North and Central America. GraceKennedy Ltd's operations span the financial, remittance, food processing and distribution industries.

*This company, long committed to supporting its own neighbourhood and Jamaica's wider concerns, has also given a donation to WINGSForum.*

## Kraft Foods Inc

Kraft Foods Inc is a global leader in branded food and beverages with a presence in more than 150 countries and expresses a responsibility and commitment to give back in support of the communities where the company and its employees are based. As the world's second largest food company, it primarily focuses on fighting hunger and encouraging children and their families to improve their physical activity and awareness of nutritional practices. Last year, Kraft provided approximately US\$84 million in food and financial support to assist those in need.

*WINGS is delighted to have the support of Kraft as a new funder of our work, introduced to WINGS by Chicago Donors Forum. Kraft Foods has provided conference bags and a number of scholarships for participants.*

## McLean Budden

Corporate and public pension funds, endowments and foundations, multi-employer funds, insurance companies, private investors, mutual fund investors and money purchase funds all rely on McLean Budden Limited to manage their global investments. For over 50 years, McLean Budden has attracted and retained these clients by paying careful attention to individual client requirements while providing superior investment performance.

*McLean Budden has made a donation to cover the writing, publishing and dissemination of the final Report of WINGSForum 2006.*

## Thailand Convention and Exhibition Bureau (TCEB)

TCEB is a public organisation dedicated to the promotion of international corporate meetings and incentives events, association meetings, conventions and exhibitions. In its role as a single coordinating gateway, TCEB acts as a coordination and facilitation centre and extends support to organisations involved in hosting events in Thailand.

*Part of our welcome to Thailand has been a grant from TCEB for the printing of conference material for participants.*

## Van Leer Group Foundation

The Van Leer Group Foundation is an internationally operating foundation in the Netherlands holding a substantial portfolio of investments. Its income mainly funds the projects of the Bernard Van Leer Foundation to enhance opportunities for children around the world who are socially, economically or educationally disadvantaged, as well as civil society development. The foundation also decided after the 2004 tsunami to have money available in South East Asia, amongst others in Thailand, to help create community-based philanthropy.

*As part of their commitment to work in Asia-Pacific the Foundation has made a grant towards the costs of WINGSForum 2006.*

## Scholarship Providers

### WK Kellogg Foundation

The WK Kellogg Foundation was established in 1930 “to help people help themselves through the practical application of knowledge and resources to improve their quality of life and that of future generations”. As a private grantmaking organisation, it provides seed money to organisations and institutions that have identified problems and designed constructive action programs aimed at solutions.

*A high proportion of the participants from Latin America and the Caribbean have had scholarships from a grant from this Foundation to help cover costs of travel and accommodation.*

### Kraft Foods Inc

See description above, under *Forum* Funders.

### Myer Foundation

The Foundation’s mission is to build a fair, just, creative, sustainable and caring society through initiatives that promote positive change in Australia, and in relation to Australia’s regional setting. The Myer Foundation was established in 1959 and was initially endowed by Sidney Myer’s sons. It is now supported by three successive generations of Myer family members. Today it represents the broad, continuing family commitment to philanthropy.

*A new supporter for WINGS, The Myer Foundation has made possible the participation of many people from organisations in the global south, especially in Asia-Pacific, through a generous grant for scholarships.*

## Other Scholarship Support

Several foundations have supported WINGSForum by providing scholarships direct to participants. These include the **Ford Foundation** (New York) and its country offices, **Institute of International Education**, and the **Trust for Civil Society** in Central and Eastern Europe.

## **Other Supporters / Sponsors**

### **Alliance Magazine**

Alliance provides news and analysis of what's happening in the philanthropy and social investment sectors across the world, and a forum for exchange of ideas and experiences among practitioners. As well as news and conference reports, articles, book reviews and opinion columns, each issue has a special in-depth feature on some key aspect of philanthropy and social investment, with contributors from around the world and expert guest editors.

*Free copies of its latest magazine were provided for all participants.*

### **GrantCraft**

GrantCraft is a project of the Ford Foundation

A source of practical wisdom for grantmakers on the tools and techniques of effective grantmaking. GrantCraft offers guides, videos and case studies that present the practitioner's view of philanthropy, on subjects like practice and methods that make grants more effective; insights into relations between grantees and grantmakers; and lessons about organising grantmaking work.

*GrantCraft held a draw to give one WINGSForum participant a complete set of its publications.*

### **Figaro Coffee Company**

Figaro is a chain of speciality coffee dining outlets that serve classic European coffees. It offers the customer a unique style of civility and service that come with the true appreciation of good coffee. Exuding old-world charm, Figaro coffee shops provide a warm and refined atmosphere to complete the experience. Now with 50 outlets in the Philippines, two in Shanghai and one in Dubai, Figaro is poised for regional expansion.

*Participants were delighted to discover in their conference bags a gift of coffee from Figaro, a member of the Philippine League of Corporate Foundations.*

### **League of Corporate Foundations**

LCF is a network of over 75 corporate foundations and corporations doing social development work throughout the Philippines. Its vision is to be the driving force in the formation of a highly committed business sector working effectively with communities and partner institutions toward the attainment of equitable and sustainable development. Its mission is to harness the resources and strengthen the commitment of corporate foundations and their principals in pursuit of national development goals through greater CSR.

*In addition to providing a great deal of help in specific conference sessions the League has donated a computer memory stick for every participant.*

### **THAI Airways**

THAI Airways offered sponsorship which assisted with the fare of a plenary speaker.

### **Stanford Social Innovation Review**

SSIR made a contribution to cover the cost of displaying information about their resources: the Centre for Social Innovation; research; the award-winning magazine, Stanford Social Innovation Review; and education programmes.

## Acknowledgements

Many people must be thanked for their work in planning and mounting WINGSForum 2006. These include:

1. *The Planning Committee*, co-chaired by Pavlina Kalousová of the **Czech Donors Forum** and Rory Tolentino of the **Asia Pacific Philanthropy Consortium**, and supported by a committee composed of:
  - Clare Brooks, **Community Foundation Network**, United Kingdom
  - Natalya Kaminarskaya, **Russia Donors' Forum**
  - Valerie S. Lies, **Donors Forum of Chicago**, United States
  - Donnell S. Mersereau, **Council of Michigan Foundations**, United States
  - Monica Mutuku, **East Africa Association of Grantmakers**, Kenya
  - Pareena Prayukvong, **The NETWORK for Business-NGO Partnerships for Sustainable Development in Asia and the Pacific**
  - Fernando Rossetti, **Grupo de Institutos, Fundações e Empresas (GIFE)**, Brazil
  - Lourdes Sanz, **Mexican Centre for Philanthropy (CEMEFI)**
  - David Winder, **Synergos Institute**, United States
  
2. *Sub-committees consisted of:*
  - **Fundraising:** Developing policy on funding issues and fundraising strategies; reviewing budgets; identifying potential supporters; helping with the funding- including scholarships and funding for the satellite meetings.
    - o Valerie Lies, **Donors Forum of Chicago**, United States
    - o Monica Patten, **Community Foundations of Canada**
  
  - **Communications:** Planning and implementing communications strategy for the event, including all aspects internal to the network and external PR
    - o Chair: Rob Buchanan, **Council on Foundations**, United States
    - o Gawin Chutima, **Thai Fund Foundation**
    - o Caroline Hartnell, **Alliance Magazine**, United Kingdom
    - o Norman (Oman) Joseph Jiao, **Association of Foundations**, Philippines
    - o Fernando Rossetti, **Grupo de Institutos, Fundações e Empresas (GIFE)**, Brazil
  
  - **Guidelines:** Assisting with preparing participation policy, invitation, and registration materials.
    - o Natalya Kaminarskaya, **Russia Donors' Forum**
    - o Lourdes Sanz, **Mexican Center for Philanthropy (CEMEFI)**
  
  - **Local Host Committee:** Advising on potential regional speakers and guests - including the official welcome, an introduction to Thailand and social events; selecting the Committee's representative on the WINGSForum Programme Planning group; assisting in identifying and approaching local donors and sponsors.
    - o Thailand Philanthropy Alliance, including
      - Paiboon Wattanasiritham (Minister of Human Security and Social Welfare, Thailand)
      - Gawin Chutima (Thai Fund Foundation)
      - Woraphat Arthayukti, Sukich Udindu, Ratti Sunthornvarapas (Friendship to Community Foundation)
      - Juree Vichit-Vadakan, Chirawan Bhakdibutr (Center for Philanthropy and Civil Society)
      - Paul Wedel Jr. (Kenan Institute Asia)
      - Pareena Prayukvong (The NETWORK for Business-NGO Partnerships for Sustainable Development in Asia and the Pacific)
      - Michita Rodsuthi Champasak (Thailand Volunteer Spirit Network)
      - Sinee Chakthranont (Ashoka Innovator for the Public, Thailand)

3. The WINGS Secretariat produced the planning framework, serviced the committees, and organised the event.
4. Gina Estipona, WINGS Coordinator of Projects and Programmes, coordinated the work.
5. Gaynor Humphreys, WINGS Executive Director, led the fundraising.
6. Secretariat staff at the event itself consisted of Gina, Gaynor and Ana Feder (who also took the lead in administering scholarship support).
7. Michael Strubin, former WINGS Outreach and Communications Manager, and Dagne Forrest, Interim Outreach and Communications Manager, were responsible for the website information and communications before and after the event.
8. Oman Jiao of the Association of Foundations (Philippines) brought his conference experience to the selection and management of the provider of audio-visual services and other aspects of presentation and communications and succeeded in ensuring a faultless service.
9. Tone Tveit of World Travel Links advised and assisted with all aspects of accommodation for the conference and its participants, liaised with the Millennium Hilton Hotel and shared her extensive knowledge of Bangkok to help plan excellent social events at interesting venues.
10. Destination Asia added locally knowledgeable staff to help with transport, registration, and all practical matters and was constantly congratulated on the efficiency and charm of its staff.

This report was prepared by WINGS Secretariat staff. Session reports were provided by Jenny Hodgson. *WINGSForum 2006* – the planning and delivery - was evaluated by Yumi Sera and Susan Beaudry. Their report is available from the WINGS website and their findings and recommendations will be thoroughly reviewed by the WINGS Coordinating Committee to inform future events.





**Worldwide Initiatives for Grantmaker Support**

c/o Asia Pacific Philanthropy Consortium (APPC)

Room 202, CSPPA Building

Ateneo de Manila University, Katipunan Avenue

Loyola Heights, Quezon City 1108

Philippines

Telephone: +63 2 926 9446

Fax: +63 2 920 9755

[info@wingsweb.org](mailto:info@wingsweb.org)