Evaluation

WINGS*Forum* 2006

Making a Difference in Philanthropy

*A Meeting of Grantmaker Associations and
Philanthropy Support Organizations from Around the World*

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

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January 2007

Prepared for

WINGS
WORLDWIDE INITIATIVES
FOR GRANTMAKER SUPPORT

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Table of Contents

I. Executive Summary

A. Introduction

In November 2006, Worldwide Initiatives for Grantmaker Support (WINGS) held its global conference, WINGS*Forum: Making a Difference in Philanthropy*, in Bangkok, Thailand. The event drew more than 160 participants from all over the world from the philanthropy and grantmaker support field.[1]

WINGS*Forum* is a cornerstone event for the organization and is currently held every four years. WINGS*Forum* anchors a series of knowledge sharing, learning, and networking activities that take place in different countries or regions and on specific topics of interest to WINGS members. Due to the significance of WINGS*Forum*, the WINGS Secretariat sought to commission an evaluation of the event. In addition, the assignment included an evaluation of two meetings of WINGS constituent groups – WINGS-CF (Community Foundations) and WINGS-CI (Corporate Initiative) – that immediately preceded WINGS*Forum*.

B. Methodology

The WINGS Secretariat contracted with Yumi Sera and Susan Beaudry (Evaluation Team) to evaluate the effectiveness, relevancy, and efficiency of WINGS*Forum* as a learning and networking opportunity for the WINGS membership. The Evaluation Team was also tasked with making recommendations to the WINGS Secretariat and Coordinating Committee for future gatherings (not only WINGS*Forum*, but other, smaller or regional activities).

The agreed upon deliverable was a final report that would include the evaluation of the process of preparing for and implementing WINGS*Forum*; an analysis of the event's program offerings and networking opportunities, in terms of their relevance and usefulness to the participants; and an overall commentary on the structure and substance of the meeting.

To meet these criteria, the Evaluation Team used several methodologies, with the following primary resources: 1) Interviews and meetings with participants, Secretariat staff, and members of the Coordinating and Planning committees, 2) Attendance by Ms. Sera at WINGS*Forum* 2006, and 3) Written evaluation forms completed by WINGS*Forum*, WINGS-CF, and WINGS-CI participants.

In addition to the WINGS*Forum* evaluation, members of the Coordinating Committee expressed an interest in surveying the membership in order to better understand their broad interests in the types and frequency of WINGS gatherings. As a result, what started as an evaluation of WINGS*Forum* expanded to include feedback from members regarding the kinds of support services they would like to see the network provide as a whole, and the directions they would like to see WINGS move in the future.

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[1] For more information on WINGS and proceedings for WINGS*Forum*, see the website: www.wingsweb.org

The rate of response for the evaluation form used at each function was as follows:

- WINGS-CF at 40 percent, or 27 out of 68 participants
- WINGS-CI at 25 percent, or 11 out of 44 participants
- WINGS*Forum* at 34 percent, or 54 out of 161 participants

The response rate via the evaluation forms was disappointing. However, the feedback provided through different methodologies with a cross-section of participants provided a rich and substantive set of data for the report.

C. Analysis

In both written evaluations and oral interviews, participants were consistently positive about their overall experience. One participant wrote, "*WINGSForum 2006 was an outstanding and rewarding event. Well done!*" Comments like this can be found throughout the evaluations.

Participants repeatedly and favorably identified four primary aspects of WINGS*Forum*, as follows:

- **Plenary speakers.** Participants were engaged by the unique and challenging perspectives brought by speakers, as well as finding speakers inspirational and "*offering hope*."
- **Workshops**. The opportunities to learn from peers about similar challenges and explore relevant topics in-depth were appreciated by participants.
- **Networking**. Sharing knowledge, exploring opportunities for collaboration, and the inspiration that comes from learning about new innovations from peers was an important part of the experience at WINGS*Forum*.
- **Global nature**. The opportunity to network and learn from peers facing similar and diverse challenges and opportunities in different parts of the world was rewarding for participants.

While participants emphasized the rich learning and knowledge sharing that takes place at WINGS*Forum*, the diverse background and experiences of participants also presents a unique set of challenges, including language barriers. Diversity also poses a challenge in addressing a broad set of information needs, based on different experiences and stages of institutional development.

The workshops were a substantive part of the overall program, and thus, merit special attention. Critiques cited that related to the workshops included:

- **Lack of different workshop formats.** With few exceptions, the workshop format used involved a moderator and three presenters. Participants expressed interest in additional formats to help address different learning styles and to help create a more stimulating learning environment.
- **Inexperienced facilitators.** In workshops where facilitators were inexperienced in moderating or had limited knowledge of the subject being presented, participants commented that discussions were unfocused. In other cases, facilitators allowed presenters to spend too much time introducing their own organizations and not maintaining an analytical framework.

D. Recommendations

The following recommendations are drawn from an analysis of the evaluation forms; meetings and interviews with Coordinating and Planning Committee members and WINGS*Forum* participants; document review of similar network and learning activities; and the experiences of the Evaluation Team:

1. **Clarify and communicate objectives of the activity**

   Consistently communicating objectives helps to ensure that participant expectations are aligned with WINGS*Forum* objectives, focus participant learning and engagement, aid session coordinators and speakers to meet objectives by focusing their presentations, and improve the evaluation for the event and thus, track the overall effectiveness of WING*Forum*.

2. **Facilitate networking and track results of networking**

   To better articulate and measure the value of the WINGS network, track and document the outcomes of the networking that may be a result of WINGS*Forum* and other WINGS programs.

3. **Disseminate information in different forms to publicize WINGS accomplishments and services**

   Provide an annual report and other information to publicize WINGS accomplishments and services and its value to the network.

4. **In planning workshops, know the target audience to design the workshop**

   Workshop planning demands that the organizer needs to think about the audience and specific target groups, select appropriate contents, and find different ways to provide them the knowledge and skills they require.

5. **Ensure effective facilitation for sessions**

   Crucial to the success of the workshop is effective facilitation, particularly in a mixed group where the knowledge and experience base may be diverse.

6. **Use adequate communication and language tools for a diverse audience**

   Adequate tools, such as interpretation and handouts, facilitate learning for a diverse audience.

7. **Designate and assign key responsibilities during the planning process**

   Planning for any event should include attention to three key and distinct functions that carry different responsibilities and require different skills: 1) Fundraising, 2) Programming, and 3) Logistics.

8. **Consider the Role of WINGS*Forum* in the flow of WINGS activities**

   Future planning should include discussion on how WINGS*Forum* relates to other activities and what follow-up will take place. A strong focus on the principles of knowledge sharing and learning should be employed.

E. Conclusion

In conclusion, the Evaluation Team wishes to thank the WINGS Secretariat in Brussels for the opportunity to learn about the important work of the network and to participate in WINGS*Forum* 2006. We also wish to thank the participants and Coordinating and Planning committee members who responded to our requests for information, willingness to be interviewed, and for completing the evaluations. The conversations with the participants were gratifying and inspirational.

Congratulations are also in order for the Asia Pacific Philanthropy Consortium, the new home of the WINGS Secretariat. It is our hope that this report assists the Secretariat and the WINGS leadership in its next steps and in planning for the future.

II. Introduction

A. Background

Worldwide Initiatives for Grantmaker Support (WINGS) is a global network of more than 130 membership associations and support organizations serving grantmakers in 50 countries. Formally launched in January 2000, WINGS evolved out of the recognition that grantmaker support organizations needed a forum in which to discuss the common issues related to their support of philanthropy worldwide. To this end, WINGS was created to serve as a meeting place for these organizations to:

- Create opportunities to learn from and support one another
- Develop modes of communication and collaboration among themselves
- Contribute to strengthening philanthropy worldwide

As a constituent group in the overall WINGS network, WINGS-CF (Community Foundations) includes organizations supporting the development and work of community foundations. WINGS-CI (Corporate Initiative) convenes organizations supporting the work of corporate grantmakers and promoting new corporate social investment.

Since January 2003, the WINGS Secretariat has been hosted by the European Foundation Centre (EFC) in Brussels. Beginning in 2007, the WINGS Secretariat will be hosted by the Asia Pacific Philanthropy Consortium in Manila.

WINGS*Forum*, a major initiative of WINGS, is a network wide gathering that convenes every four years. The network recently gathered for the third time in Bangkok, Thailand, from November 16 to 18, 2006. WINGS*Forum* 2006 brought together 161 participants from organizations in Africa, the Americas, Asia Pacific, Europe, and Middle East. WINGS*Forum* was preceded by the WINGS-CF and WINGS-CI satellite meetings on November 15.

WINGS*Forum* anchors a series of knowledge sharing, learning, and networking activities that take place in different countries or regions and on specific topics of interest to its members. WINGS*Forum* set out the following objectives:
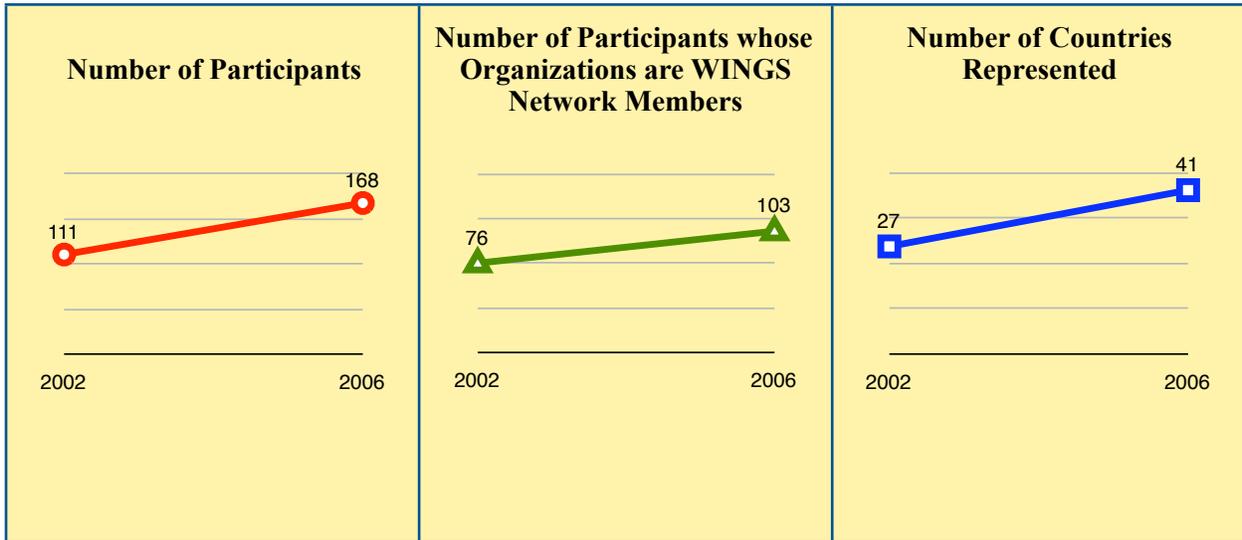
- Offer professional development opportunities to participants to strengthen their service to their own networks and members
- Enhance the performance of their organizations to strengthen civil society
- Ensure that WINGS priorities and plans for the next few years are based on a strong awareness of the needs and interests of the network
- Showcase learning and accomplishments, and in particular, raise awareness of the nature and quality of work in the Asia-Pacific region where the event will take place
- Demonstrate and inspire collaborative work

There was an added dimension to this event of considerable importance to the network: the WINGS Secretariat moved to the Philippines in January 2007. WINGS*Forum* was seen as an opportunity for the Secretariat to emphasize the move, introduce the new Director of WINGS, and make a special effort to have the full participation of network members from Asia-Pacific.
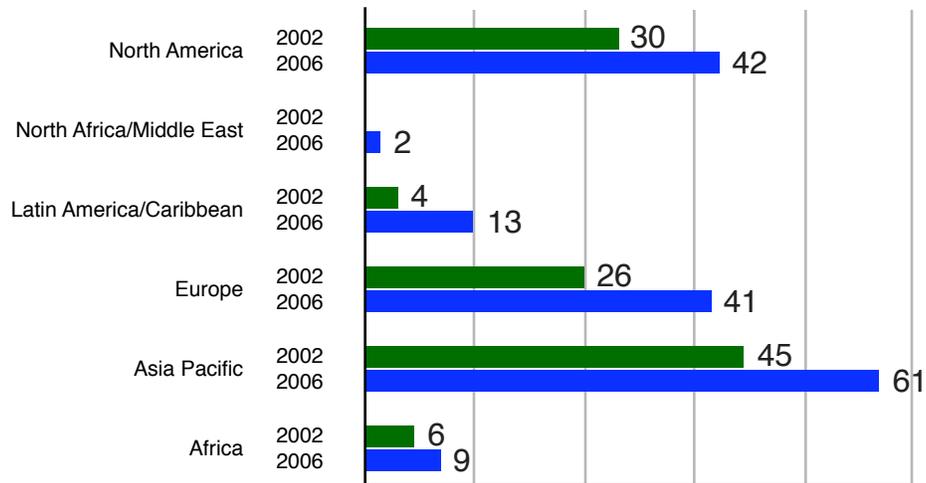
B. Profile of Participants

The WINGS*Forum* participants (including staff and consultants) hailed from many regions around the globe. The charts below shows the comparison of participants of WINGS*Forum* 2002 and WINGS*Forum* 2006.

Figure 1:
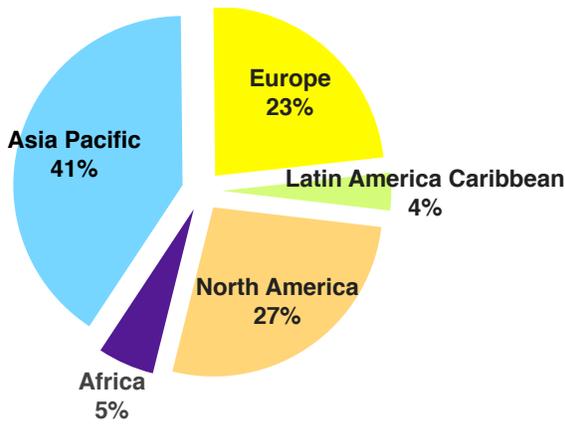**Profile of Participants (including staff and consultants) WINGS*Forum* 2002 and WINGS*Forum* 2006**

Number of Participants	Number of Participants whose Organizations are WINGS Network Members	Number of Countries Represented
111 → 168	76 → 103	27 → 41
2002 — 2006	2002 — 2006	2002 — 2006

Figure 2:
Number of Participants (<u>including</u> staff and consultants) by Region
2002 Total 111; 2006 Total 168

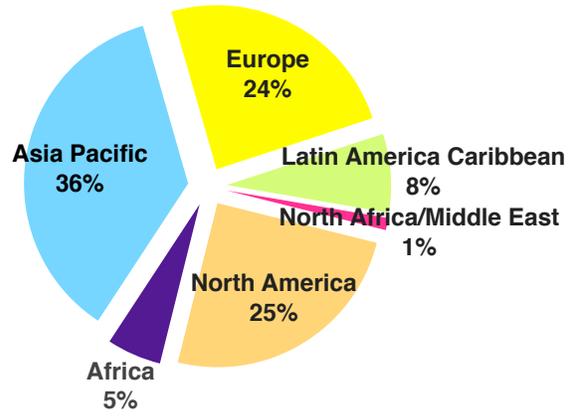| Region	2002	2006
North America	30	42
North Africa/Middle East		2
Latin America/Caribbean	4	13
Europe	26	41
Asia Pacific	45	61
Africa	6	9

Figure 3:
Percentage of Participants (<u>including</u> staff and consultants) by Region
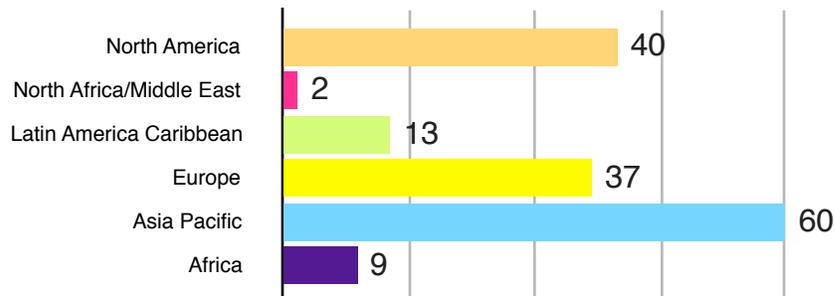
WINGS*Forum* 2002
Total 111

WINGS*Forum* 2006
Total 168

Figure 4:
WINGS*Forum* 2006 Number of Participants (<u>excluding</u> staff and consultants) by Region
Total 161 Participants[2]

The comparison between WINGS*Forum* 2002 and WINGS*Forum* 2006 in the number and profile of participants shows that, along with the 51 percent increase in total number of participants, the regional diversity also increased (as illustrated in Figure 3). There was a sharp increase in numbers participating from all regions with a 52 percent increase in the number of countries participating. The two participants from North Africa / Middle East added a new region to the mix. Participants from Latin America and the Caribbean increased by 220 percent, most likely due to the full financial assistance provided by funders to the participants from this region, as well as the increase in the number of new associations and support organizations in this region. This increase demonstrates that focused efforts by funders can make a dramatic difference in participation from a single region.

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[2] WINGS*Forum* 2006 had seven staff and consultants, excluding on-site support. Figures for WINGS*Forum* 2002 do not separate participants from staff and consultants.

WINGS*Forum* 2006 was seen as an opportunity to have full participation of the network members from Asia Pacific. The numbers show that there was a 36 percent increase in the number of participants from Asia Pacific from 2002 and that the plurality (largest number) of participants was from Asia Pacific.

Although the proportion of participants from Africa, Europe, and North America remained almost the same, the numbers increased by 50 percent for Africa, 58 percent for Europe, and 40 percent for North America. The majority of participants from North America was from the United States, only seven percent of the North American participants were from Canada. Participants from the United States accounted for the largest number of participants from any one country.

For future planning, WINGS may want to compare numbers of participants by region to design and implement specific outreach methods. WINGS could also design and develop specific, targeted approaches for information, knowledge sharing, and skills building based on the regional affiliation of the participants.

C. Purpose of the Evaluation

The broad intention of the evaluation (as defined in the Terms of Reference, TOR, see Appendix 1) was to assess the effectiveness of WINGS*Forum* as a learning and networking opportunity for organizations in the network, and to review the planning and organizational procedures used by WINGS. The evaluation findings and pursuit recommendations would provide the WINGS Secretariat and Coordinating Committee with new tools and insights as they plan for future gatherings, not only WINGS*Forum* but also other, smaller or regional activities. (The evaluations for WINGS-CF and WINGS-CI satellite meetings can be found in Appendix 2.)

Further consultation with members of the Coordinating Committee demonstrated a desire for a "survey" of the membership to gauge their interests for types and frequency of WINGS gatherings. Some committee members expressed that they were not seeking feedback on specific workshops, per se, but a more general overview of the participant's experience at WINGS*Forum*.

As a result, what started as an evaluation of WINGS*Forum* has expanded to include feedback from members regarding the kinds of support services they would like to see the network provide as a whole, and the directions they would like to see WINGS move in the future. The expanded scope of this report, then, is intended to assist the Secretariat and the WINGS leadership in its next steps and to take advantage of the momentum built from WINGS*Forum*, the increase in membership, and the organization's transition to Manila.

D. Methodology

Several instruments were used as part of the evaluation process (description is in Appendix 3: Methodology). These included:

1. Terms of Reference (see Appendix 1): The evaluation was formulated according to the stated objectives in the Terms of Reference.
2. Document review
3. Survey for members of Coordinating and Planning Committees
4. Evaluation forms for WINGS*Forum* and satellite meetings (see Appendix 4)
5. Interviews with participants and committee members during WINGS*Forum*
6. Secretariat debrief meeting
7. Planning Committee debrief meeting

E. Contents of the Report

When reading the report, there are two main aspects for the reader to keep in mind: 1) The overall rating for WINGS*Forum* was positive and 2) as in any large group gathering, there will always be mixed (and even opposite) reactions to the same activity. The report tries to present any constructive criticisms as improvements of future activities.

The report is divided into the following main sections with background documents in the appendix:

- **Analysis**: Summarizes and synthesizes the key points that were reflected in the evaluation and meetings
- **WINGS Services**: Provides a starting-point for suggestion to the WINGS Secretariat as to what types of services respondents expressed interest. These suggestions should be combined with the synthesis from the various meetings that were held during WINGS*Forum* and satellite meetings. They can be used as inputs to the next strategic planning meeting.
- **Recommendations**: Offers recommendations for the future planning of WINGS*Forum* and other WINGS activities

III. Analysis

The analysis in this report is based on the evaluation forms, interviews of participants and committee members, and debriefing meetings held with the Secretariat and Planning Committee. As much as possible, viewpoints from different perspectives are synthesized. Opinions of the Evaluation Team is limited to expert advice on aspects such as workshop formats, in an effort to make the report useful to readers who may organize similar meetings.

A. Objectives and Experience

The section on "Objectives and Experience" in the evaluation form asked participants to refer to their overall experience, keeping in mind workshops, plenary sessions, networking and social activities, and exhibits. Yes/No questions were used to ask whether WINGS*Forum* met its objectives. Open-ended questions were used to get feedback on what participants liked most and least about the event.

The questions asked regarding the overall objectives and experience were:

- Did WINGS*Forum* provide professional development opportunities to strengthen the service to your own networks?
- Did WINGS*Forum* raise your awareness of the quality of work in the Asia Pacific region?
- Did WINGS*Forum* provide you with ideas about areas in which to collaborate with other WINGS members?
- Did WINGS*Forum* provide adequate opportunities for networking?
- Did WINGS*Forum* include presentations from different regions of the world?
- Will WINGS*Forum* enhance your organization's performance in strengthening civil society?
- Will WINGS*Forum* make a difference in your organization's programming?

The responses to the questions demonstrate that 5 out of 7 objectives were fully met. The two objectives respondents ranked lowest were: 1) Raising awareness of the quality of work in the Asia Pacific region and 2) Making a difference in organizational programming. Figure 5 shows the comparison of responses.

Figure 5:
Summary of Responses to Objectives
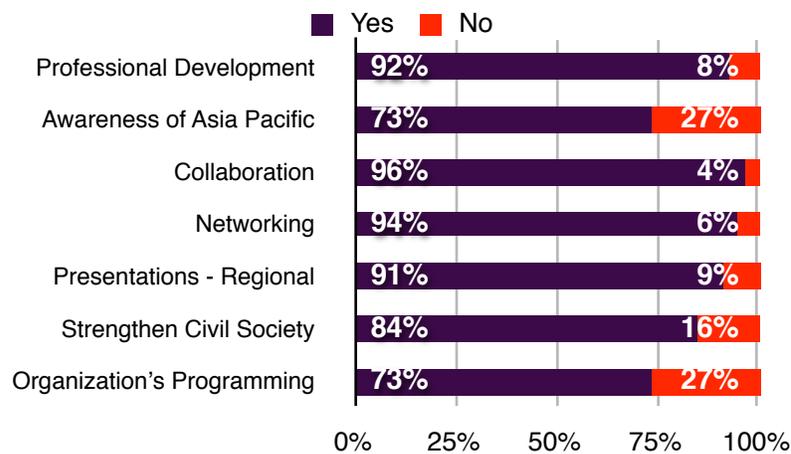
1.   What Participants Liked Most

Participants were generally positive about their overall experience. Thirty-three percent (33%) of the evaluation respondents liked the quality and balance of the plenary speakers. The Planning Committee members were also unanimous in their appreciation for the plenary speakers. Four plenary sessions were held during the course of WINGS*Forum* and speakers reflected views from different perspectives from civil society, backgrounds, and countries. The "*hope*" offered by the keynotes provided a balance to the practical workshops. Mr. Zobel de Ayala, noted several times as an inspirational speaker, spoke about strategic philanthropy in the 21st century.

"I would venture to suggest that philanthropic institutions harness the disciplines of business in analyzing the social problems they seek to solve while retaining the passion that sustains us even when faced with the seemingly insurmountable problems of poverty."

- Jaime Augusto Zobel de Ayala II

Thirty-three percent (33%) of respondents also ranked networking as the aspect of WINGS*Forum* they liked most. Networking also received high marks from Planning Committee members. Conscious efforts were made by the organizers to provide space and time for networking and these efforts were appreciated. The venue itself with its spacious, but enclosed areas, enabled participants to meet. The group meals, reception, and breaks provided a space for interaction. Workshops were purposefully planned with intent to provide a time for sharing experiences, which helped to facilitate the networking. Networking was also cited in the WINGS-CF and WINGS-CI evaluations as a very important aspect of the satellite meetings. See Box 1 for story on networking.

"Plenary session speakers were great – very reflective, thoughtful, and thought-provoking."
- WINGSForum participant

"Networking and peer learning [through] interaction at breakout sessions was very rewarding in terms of Learning, Leveraging, and Lifting."
*- Planning Committee Member*

> **Box 1: Meeting, networking, and connecting through WINGS**
> A successful networking story emerged from one of the interviews. At a WINGS Peer Learning Event, a participant from Thailand connected over dinner with a South African colleague. The two maintained contact via email over the months that followed. During the recent WINGS*Forum*, the South African participant stayed with her colleague in Thailand. The two women engaged each other in discussions regarding the challenges of raising funds and issues of the poor, women, and the environment in Thailand and South Africa, finding many similarities. The women are currently making plans to further the exchange through in-depth visits and technical assistance.

Twenty-five percent (25%) of the respondents also appreciated the "global" aspect of WINGS*Forum* that provided an opportunity for participants to network and learn from their peers facing similar and diverse challenges and opportunities in different parts of the world. One participant remarked, "*I thought I was the minority coming from Africa, but discovered that people from other parts of the world face similar challenges.*" Another one said, "*This was the first time I engaged with people from Eastern [Central] Europe and South America.*" In addition, according to participants from Thailand and the U.S., the international exposure and learning facilitated at WINGS*Forum* adds credibility to an individual's professional standing.

The evaluation asked four questions regarding the respondent's profile. One question asked where the respondents' organizational headquarters were located. Figure 6 shows the regional representation in the responses. One statistic that stands out is the low percentage of respondents from Asia Pacific (23%) compared to the percentage of actual participants from Asia Pacific (37%).

Figure 6:
What region of the world is your organization's headquarters located? (53 total responses)
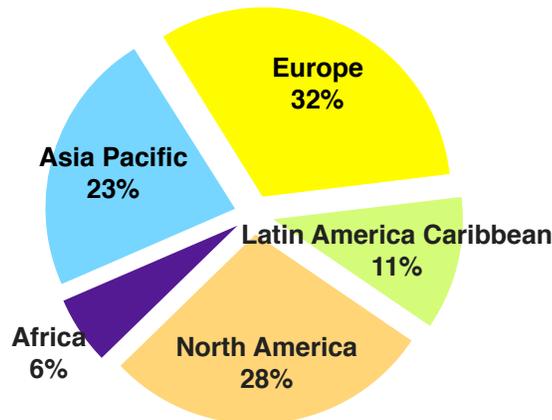
2. What Participants Liked Least

Diversity provides rich and informed perspectives for a global gathering, but also leads to some dissatisfaction based on the participant's own expectations. The comments on diversity were not unanimous: Some participants felt there was an over-representation of speakers (both in presentations and discussions) from the "North."

Participants and committee members perceived a lack of participation from the local Thai hosts and participants. One participant remarked, "*The forum lacked local flavor and failed to take advantage of holding the event in Bangkok, Thailand, in terms of learning about the Thailand foundation scene and their development issues.*"

There was a 51 percent increase in participants since WINGS*Forum* 2002. The increase in participants created a group that was not only diverse in terms of experiences, nationalities, and cultural perspectives, but also in terms of expectations of what WINGS*Forum* and the network have to offer. Some of the first timers were from nascent organizations and wanted to know more about the basics of "community foundations," or about general WINGS membership information. As one participant mentioned, there was "*no thread to tie the old, new, and in-between.*"

"Participants were at different places in their knowledge and skills so concurrent workshops presentations were boring for some, interesting for others." - Planning Committee Member

There was also a broad range of experience among the participating support organizations, in terms of their focus, responsibilities, and membership. WINGS*Forum* did not distinguish between the types and levels of experiences. As demonstrated in Figure 5, there was a range in the years of experience among respondents, which could mean that these groups face different issues due to their own specific stage of

institutional development. Figure 7 shows how respondents answered the question, "Which of the following descriptions best characterizes your organization?."

Figure 7:
Which of the following descriptions best characterizes your organization? (54 responses)
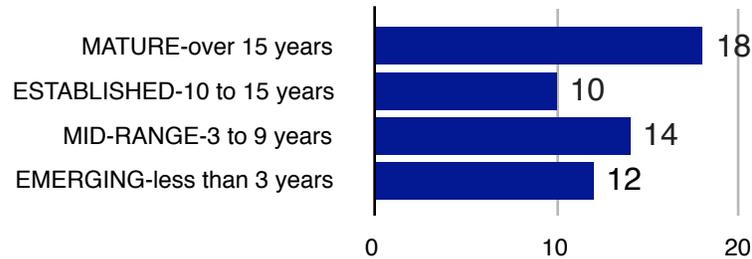
The primary title or role of the respondent, as illustrated in Figure 8, may also reflect the differences in needs and perspectives for specific information and networking opportunities.

Figure 8:
What is your primary title or role in your organization? (54 responses)
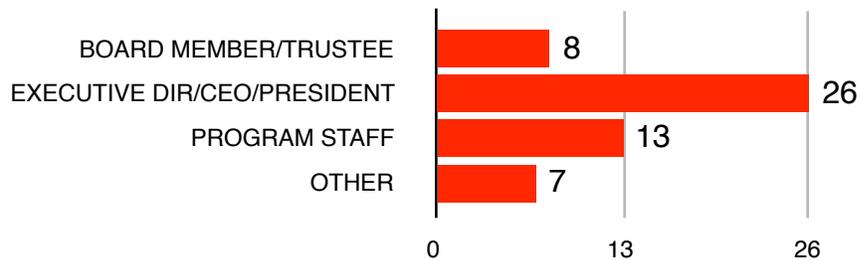
"Language" was also another obstacle in the understanding of terms and concepts. Part of the problem could be solved by language interpretation, but in some cases it was a cultural or contextual interpretation that posed challenges. Some speakers were also not able to translate their unique, localized experience into an analysis that could be applicable to other contexts.

In spite of the constructive feedback received, the blend of speakers, structured and unstructured networking activities, cultural events, and the venue created a positive overall experience. In an interview with the leadership of WINGS, it was evident that WINGS is committed to getting to know their stakeholders to meet their needs and recognized that diversity is a strength.

B. Workshops

The section in the evaluation on workshops[3] asked participants to rate and comment on three workshops they attended, and in particular, to consider the following elements:

- Relevance of content to participants' work
- Effectiveness of the presenters and format
- Opportunities for participation, learning, and networking

WINGS*Forum* offered eighteen workshops. These workshops were held concurrently with up to four workshops during five allotted times in the program. Overall, the response to the workshops was positive, with some variants. Respondents favorably acknowledged presentations that were well prepared; speakers that demonstrated expertise and honesty in sharing "lessons learned;" and content that blended theory with practice.

While the overall response to the workshops was favorable, one of the frequently expressed criticisms related to the format and structure of the sessions. This was expressed in both the general comments about workshops and in the question, "What elements of WINGS*Forum* did you like the least and why?" Participants identified three particular issues:

- Facilitators lacking skills as moderators
- Lack of different workshop models, beyond the three speakers and a moderator format
- Too much time spent on introducing speakers and discussing their own organizations

Participants were asked to answer Yes or No to questions regarding the workshops which are summarized in Figure 9. Respondents were least satisfied with the opportunity to network during the workshop, although there were adequate opportunities to participate. They were also least satisfied with the workshop format.

Figure 9:
Summary of Responses to Workshops

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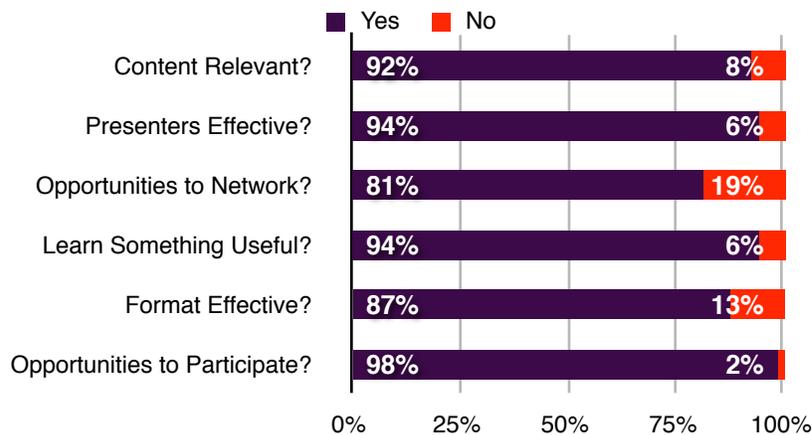
3 In response to a committee member suggesting that WINGS could have a more active role in suggesting methodologies for the workshop, Appendix 5 includes strategies for creating and implementing successful workshops and ideas for effective workshop formats.

1. Relevance of Content

Ninety-two percent (92%) of the respondents found the topics of the workshop to be relevant to their work. The vast majority of the workshops highlighted in the evaluation for further assessment were highly rated, and remarks included, "*highly effective*," "*excellent*," and "*offering hope*."

Participants highly regarded or expressed strong preferences for workshops that provided opportunities to learn through:

- Gaining "hands on" experience
- Increasing the skills of participants
- Concrete examples of principles put into action
- Case studies
- Analytical framework

Workshops receiving less favorable responses were those that spent "*too much time discussing the organizations of presenters*" and less on content, discussion, and providing an analytical framework. This comment was also reflected in WINGS*Forum* 2002 evaluation. See Box 2 for the most highly rated workshops.

2. Effectiveness of the Presenters and Format

While ninety-four percent (94%) of respondents felt workshop presenters were effective, moderators with facilitation skills that encouraged discussion and participation were key to a successful workshop. Participants remarked that a moderator's lack of skills or knowledge of a subject caused discussions within workshops to "*drift*." See Box 3 for an example of a workshop that was effectively moderated.

Eighty-seven percent (87%) of respondents responded positively to the question on effectiveness of the workshop format. However, the format of the workshops was singled out as a critique by some. The majority of the workshop formats were variations of the three speakers plus moderator. Some of the workshop moderators tried to innovate by presenting a "talk show" format or moving chairs to be closer to the audience. Others experimented with a small group breakout during the workshop. The format may have also been partially hindered by the classroom style set up due to room size.

> **Box 2: Highly Rated Workshops:**
>
> - *Emerging Patterns within New Philanthropy*
> - *Building Capacity for Public Policy and Good Government Relations*
> - *Supporting Community Philanthropy: Nationally, Transnationally, and Globally*
>
> Twenty-four percent (24%) of the respondents positively rated the workshop, *Emerging Patterns within New Philanthropy*. Respondents wrote, "*This was the best session. The speakers were excellent and the moderator was wonderful, engaging the audience,*" and "*The workshop challenged our thinking and skepticism, and was quite appropriate for organizations with diverse members.*"
>
> *Building Capacity for Public Policy and Good Government Relations* and *Supporting Community Philanthropy: Nationally, Transnationally, and Globally* received the second and third number of positive responses, at 22 percent and 20 percent, respectively. Regarding the workshop on public policy and government relations, a participant wrote, "T*his workshop was very interesting because it allowed us to think about the advocacy of civil society, changes in legislation, and how we can influence decision making.*" A participant in the supporting community philanthropy workshop wrote, "*The session became a very introspective conversation about philanthropy intervention in communities. It was an important topic, with knowledgeable speakers and good facilitation.*"

Multi-media presentations were applauded. Two favorable examples included the Beautiful Foundation's (Korea) CD-ROM on teaching philanthropy in schools and Kenya Community Development Foundation's video demonstrating communication strategies.

> ***Box 3: Example of an Effectively Moderated Workshop***
> A participant offered the following example of an effectively moderated workshop. At the beginning, the moderator polled the audience on their understanding of the subject, which helped 1) engage the participants and 2) alert the speakers about the knowledge level of their audience. The moderator then set out to define the terms commonly used in the context of time and space showing the evolution of the subject. The moderator was effective in his task because he was familiar with the subject and the speakers' viewpoints, and built a rapport with both participants and the speakers. (Refers to workshop, *Emerging Patterns within New Philanthropy.)*

Interaction between participants was repeatedly stated as among the best aspects of the conference, and respondents expressed interest in further developing these opportunities: This is a group of people who are interested in the experiences of their colleagues and feel enriched by opportunities to learn from one another. If well organized, small group breakout sessions are one way to facilitate this type of exchange and peer learning. See Box 4 for Small Group Breakout description.

> ***Box 4: Small Group Breakout***
> For small group breakouts, the workshop organizer needs to take into consideration the level of knowledge of the participants and their ability and desire to engage in discussion to meet the objectives. Small group discussions or breakout groups can be useful approaches when the participants include individuals who have extensive knowledge and experience on a topic or a situation that involves teamwork or problem solving. The value of a small group discussion is that it maximizes peer-to-peer interaction.

3. Opportunities for Participation, Learning, and Networking

Ninety-eight percent (98%) of respondents replied favorably to the question on whether they were able to find opportunities to participate in the workshop. However, as noted previously, language interpretation and translation was a barrier to full participation by some of the conference attendees.

As a means of addressing this issue, handouts from speakers, enabling participants to read about the topic of the workshop in more depth, was cited as helpful. Respondents noted the handouts, "Accountability Self-Assessment for Staffed Private Foundations" and "Grantcraft" as examples of useful tools. Respondents for whom English is not a first language also urged that workshop outlines and supporting handouts be made available to assist with translation and understanding. Although some speakers and participants expressed an aversion to formal PowerPoint presentations, others expressed that this tool provided an important aid, allowing them to follow the speaker's key points. Respondents to WINGS*Forum* 2002 evaluation also expressed a desire for more handouts in the workshops. See Box 5 on Presentations and Handouts.

Ninety-four percent (94%) of respondents said yes when asked if they learned something from the workshops in which they participated. A participant remarked, "*The workshop was very much on target in helping me to understand what to do and what not to do in my organization.*" Another wrote, "*Thoughts from the workshop remained with me through all the activities.*"

Eighty-one percent (81%) of the respondents felt adequate opportunities were available to network with participants, while 19 percent did not agree. This may have been due, in part, to the nature of the format and the body of each workshop being directed by speakers, rather than emphasizing networking. Many of the workshops were commended for providing interaction and an exchange of ideas among participants, but the direct relationship building aspect of networking is not typically part of this type of session.

It should be noted that in the *overall experience,* 94 percent of respondents felt there were adequate opportunities for networking.
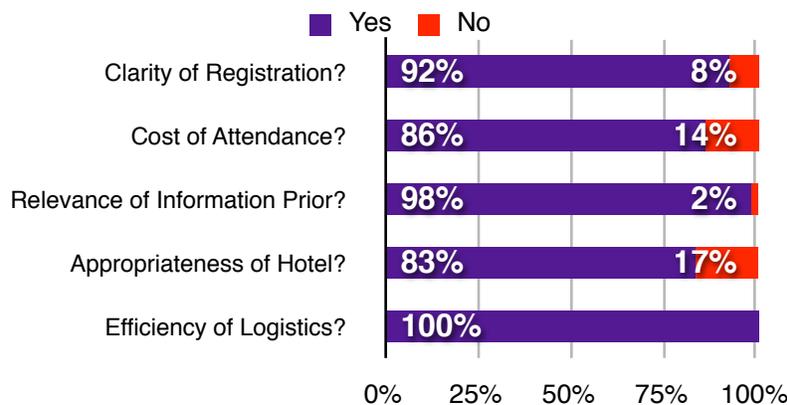
Box 5: Presentations and Handouts
In sessions with multilingual and multicultural groups, or in situatoins where it is difficult for all to keep pace with and understand the content solely on the basis of an oral presentation, PowerPoint presentations can be effective. Presentations given as handouts, especially those with notes, are extremely helpful as quick reference material for participants and organizers.

Another benefit of handouts and background notes is that they require presenters to be clear about objectives, key points and recommendations. In turn this preparation and degree of focus on the part of the speaker helps to build the knowledge base of the audience and helps further the discussion. In some cases, background papers could help discussions progress further (from Evaluation of WNGS*Forum* 2002).

C. LOGISTICS

The section on logistics asked for rating on the on-line registration process, cost of attendance, prior information, hotel meeting venue, and logistical operations. Figure 10 provides the summary of responses to the questions regarding logistics. Clearly, the participants were pleased with the smooth logistical operations during WINGS*Forum.*

Figure 10:
Summary of Responses to Logistics

	Yes	No
Clarity of Registration?	92%	8%
Cost of Attendance?	86%	14%
Relevance of Information Prior?	98%	2%
Appropriateness of Hotel?	83%	17%
Efficiency of Logistics?	100%	

Respondents to the evaluation and committee members alike gave logistics high praise, commenting, "*logistics worked perfectly*." Operations during WINGS*Forum* flowed smoothly and the staff of Destination Asia was "*always helpful and smiling*."[4]

Thirteen percent (13%) of the respondents remarked that the hotel venue was not appropriate because it was too "*posh*" and "*excessive*." Others had positive remarks about the hotel, such as "*fabulous*" and an "*excellent venue*."

To put the choice of venue into perspective, an interview with the conference coordinator (a professional firm hired by WINGS to coordinate conference venue logistics) highlighted the variables used to select the particular venue and hotel, including:

- Availability of conference venue (not a convention center) in a particular city
- Accessibility to the location for participants from different parts of the world
- Perceived security of the city, country
- Ambiance for the type of group
- Availability and affordability of guest rooms during high season
- Types and sizes of meeting rooms for concurrent and plenary sessions with capabilities for technology
- Services provided by the hotel
- Space for meals and breaks, as well as open space for networking
- Office space for Secretariat
- Dates of meeting

The conference coordinator suggested that when selecting a conference site among different cities, the Secretariat or Planning Committee should request assistance from a travel or destination industry representative to research the suitability of a venue prior to making decisions. Bangkok as a choice of venue, concluded one Planning Committee member, "*brought more networks and philanthropy support organizations to find out that WINGS is in the new host region*."

In addition to the variables for the selection of the venue, a key element in the operations of the WINGS*Forum* was the consultant responsible for supervising the technical aspects of the event. This person's responsibilities included: overseeing the technical and audio-visual facilities; supervising the external audio-visual company; room layout; computers/internet access; and collecting any electronic documentation. A participant remarked about the well-organized logistics, "*You know who to go to if there are problems or needs during the workshops and who is responsible for taking care of the logistics*."

D. Planning

A "team spirit" seems to have come out of the planning that culminated in WINGS*Forum*. The Planning Committee made decisions on the workshop topics based on perceived needs of the membership (emanating from WINGS activities) and the response to the call for workshop proposals. Each concurrent workshop had an organizer, moderator, and two to three presenters[5].

Some of the features that contributed to the Planning Committee's success included:

- A competent Secretariat that monitored the tasks necessary to successful planning and provided "*extraordinary staff support*"

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4 Destination Asia staff (dressed in matching blue uniforms) provided logistical support, advice on sightseeing tours or city information, and one-stop service to the participants.

5 The process of workshop selection and coordination is documented by the WINGS Secretariat.

- Leadership that helped to guide the planning with expertise and dedication
- Constant phone and email communication, especially with team members of the Secretariat located in different parts of the globe, to coordinate logistics
- High synergy and cooperation among the Secretariat team with one person responsible for tracking progress with an agenda and checklist
- Fundraising that allowed more participants – some from a number of new countries – to attend
- Face-to-face meetings tagged to other WINGS activities that complemented the virtual communication and teleconference calls
- The "global" aspect of WINGS was preserved, with participation encouraged from all over the world through the aid of communications technology
- Members from the local host committee provided advice and facilitated the invitation of Thai speakers

Some of the *hindering* factors were:

- Being a volunteer planning committee, there was a strong reliance on only a few people within the group
- Most of workshop planning took place electronically or by teleconferencing, and many workshop presenters and organizers met face-to-face for the first time at WINGS*Forum,* a limitation that may not be uncommon for workshop planning
- A local host committee that was not active in the preparations and planning, resulting in responsibilities and tasks that could have been taken over or shared falling upon the Secretariat
- With no local host supporting the planning, the Secretariat oversaw all aspects of WINGS*Forum*, including: 1) fundraising (with limited local fundraising prospects), 2) logistics of planning a meeting in a venue half-way across the world, and 3) programming, which entailed coordinating teleconferences among presenters or committee members from many different time zones

In addition, the timing of WINGS*Forum* 2006 was not ideal. With the WINGS Secretariat shifting its base of operations to the Philippines, staff was in transition to other jobs leaving gaps in organizational capacity. The transition of the Secretariat also limited plans for the Secretariat's commitment to follow-up activities. Planning for the next WINGS*Forum* should closely examine the pros and cons of timing the organization's main gathering with the relocation of the Secretariat and staff transitions.

IV. WINGS Services

Outlined in the Terms of Reference, and echoed by Planning and Coordinating committee members, was the desire to better understand the interests and needs of the WINGS membership. To this end, a survey component was added to the evaluation with the following questions:

- What topics would you like to see addressed at future WINGS gatherings?
- What kind of gatherings do you prefer, including how often the network should meet, the type of meetings (global / regional / electronic) held, and the purpose of these meetings?
- What services would you like to see WINGS provide to meet the needs of the membership?

In addition to this survey, Planning Committee members facilitated small group sessions with focused questions to gather inputs regarding services from participants during WINGS*Forum* and the WINGS-CF and WINGS-CI satellite meetings.

A. Topics

The question, "What topics would you like to see addressed at future WINGS gatherings?" generated the greatest rate of response.

- The most frequently cited ideas for topics were a "*core skills*" or "*professional development*" learning track at WINGS*Forum* or other WINGS activities, with a response rate of 45 percent.
- Specific suggestions under this heading included governance issues and relationships with board members; fundraising, building endowments, and strategies for financial sustainability; understanding and working within complex legal frameworks; communication and marketing skills; and exploring ethics and standards for philanthropic support organizations.
- Respondents also indicated that case based learning or a focus on case studies was an effective method for further exploring these issues.

B. Meeting Preferences

In response to the question, "What kind of gatherings do you prefer, including how often the network should meet, the type of meetings (global / regional / electronic) held, and the purpose of these meetings?" respondents answered:

- The global meeting – WINGS*Forum* –should be continued. The response rate was nearly unanimous, with only one respondent indicating preference for regional meetings.
- Greater frequency of varied meetings types. The greatest rate of response, 45 percent, came from respondents calling for additional meetings beyond WINGS*Forum*, including regional meetings; meetings on special interests or topics relevant to a majority of members; or meetings organized by sector, for example, emerging organizations.
- The second most frequent response, at 13 percent, indicated that no additional meetings were necessary, or perhaps, even possible, with one participant stating, "*It is unlikely that I could afford the global meeting more than every four years.*"
- The global meeting should be held more frequently. With a response rate of 13 percent, members requested that the global meeting be held either annually, or every two or three years.
- Peer learning opportunities. These events were identified as an important offering currently provided by WINGS and one that should be continued.
- Conference follow-up. Requests for WINGS to facilitate on-going electronic communication among members as part of the follow-up from conferences and other events was mentioned

numerous times, and elsewhere in the evaluation responses. These requests were also indicated in the WINGS-CF and WINGS-CI satellite meeting evaluations.

C. Services from WINGS

The question "What services would you like to see WINGS provide to meet the needs of the membership?" assumed that the respondents were familiar with the services that WINGS already offers. However, it became clear during WINGS*Forum* that the participants may not have had sufficient knowledge of the services WINGS currently provides. Thus, responses to this question may duplicate those services already provided by WINGS. Two primary services were identified by respondents:

- Requests for the Secretariat to serve as an "Electronic Idea Bank" or "Information Distribution Center" received the greatest rate of response at 40 percent. There was strong interest in WINGS establishing new communication channels and opportunities for information sharing, distributing reports and research on best practices and case studies; maintaining a database of donors and sources of relevant fellowship or scholarship funds; and providing this information in English as well as Spanish.
- Peer learning events and "on the job training" via staff exchanges were recommended by 19 percent of respondents.

D. Conclusion

The requests made regarding the desired services and potential future directions of WINGS were clear and consistent in the survey, with skills building programs, increased opportunities to meet face to face to learn and share information, and participating in an active and resource-rich electronic forum at the core. It should be noted that while respondents stated a preference for face to face meetings and convenings, there was also recognition of the fact that logistics and expenses might require that some of these offerings be facilitated electronically. As the Secretariat shifts its base of operations to Manila and considers new programs or initiatives, these requests should be at the forefront of planning.

V. Recommendations

These recommendations are presented to help plan the next WINGS*Forum* and other WINGS activities; to provide insight for the up-coming strategic plan; and to contribute to the orientation for the new staff of the WINGS Secretariat. Although the recommendations were initiated as a result of the evaluation, they should not be seen as a critical assessment of the current situation. Instead, they are meant to serve as a synthesis from resource materials and the evaluation, applied to improve the sustainability and functionality of the WINGS network.

A. Objectives and Experience

1. Clarify and Communicate Objectives

The objectives of WINGS*Forum* were not consistently articulated to the membership in the organization's materials, including the website and the program brochure. The objectives for the program should be clear in all materials, including the website, program brochure, and in communications to session coordinators and speakers. Clarity in objectives and focus helps to: 1) ensure that participant expectations are aligned with WINGS*Forum's* objectives, 2) focus participant learning and engagement, 3) aid session coordinators and speakers to meet objectives by focusing their presentations, and 4) improve the evaluation for the event, and thus, track the overall effectiveness of WINGS*Forum*. The fundamental requirements for a meaningful evaluation are clear objectives to ensure that the results of the activities met the objectives.

The workshops were divided into tracks, but the description and distinctions in the program brochure were unclear. It was also unclear as to how the "tracks" related to the objectives. The intended purpose of the "tracks" should be to help the participants organize their own participation according to their needs. Tracks could be thematic, skills-based, or both. For example, thematic tracks would be similar to WINGS*Forum* tracks[6]. Alternately, skills-based tracks could delineate the type of skills and knowledge required for professional development.[7] The tracks or workshops could also indicate the audience for the sessions, for example, by level of experience (mature organization or newcomer).

2. Facilitate Networking and Track Results of the Networking

Although the majority of respondents appreciated the opportunities for networking, a few respondents requested more structured networking opportunities. Suggested methodologies to facilitate the networking would be to provide a handout that contains profiles of the organizations, as opposed to just participant names and contact information. Another option would be to organize a team building experience that would break down some of the language and cultural barriers, such as an interactive exercise or field visit.

One way to better articulate and measure the value of the WINGS network is to track and document the outcomes of the networking that may be a result of WINGS*Forum* and other WINGS programs. Since WINGS*Forum* places a high premium on "networking," it may be useful to better define what the networking activities are intended to accomplish, for example, focused collaboration, better informed

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6 Track 1: Organizational capacity building and sustainability, Track 2: Raising awareness / Communicating about the field, Track 3: Developing an enabling environment, Track 4: Accountability and effectiveness.

7 For example, the Council on Foundation's Family Foundation conference (2006) organized their tracks according to the following: 1) Foundation Basics, 2) Governance (structure, stewardship, ethical leadership), 3) Management (strategies and tactics related to administration and operation, technology, legal), 4) Grantmaking (funding for social change, grant impact, capacity building), 5) Forum (emerging issues, renew their sense of purpose to philanthropy).

work plans, new knowledge, or influence of policy makers. Once these desired outcomes are defined, WINGS could capture and track these efforts.[8]

3. Disseminate Information in Different Forms to Publicize WINGS Accomplishments and Services

WINGS could provide an annual report with WINGS accomplishments so "*members could understand and appreciate the full work of the network.*" At WINGS*Forum*, WINGS could provide information on the services offered so the membership is aware of the types and breadth of activities and resources available, as well as how they could get involved. Information could be provided in a brochure, as well as on a display table. "Senior" members can be designated as resource people to go to for more information on how to get involved.

B. Workshops

4. Know Your Target Audience to Design the Workshop

Experts in the knowledge sharing and learning field insist that effective workshop planning demands thinking about the audience and specific target groups, selecting appropriate contents, and finding different ways to provide them the knowledge and skills they require. Participation can be encouraged and increased by designing an appropriate format and methodology.

In designing workshops that seek to meet the objectives of offering professional development opportunities, enhancing the performance of organizations, showcasing learnings, and inspiring collaborative work (objectives of WINGS*Forum*), organizers need to think through:

- The participants: their profiles, perspectives, learning styles, roles and responsibilities, and motivations for learning
- The selection of formats and methods, keeping in mind the above objectives

When designing workshops, planners also need to consider options for improving knowledge retention, including adopting a "learning-by-doing" approach. Pedagogy experts maintain that adults retain only 5 percent of learning delivered through a lecture, as compared to 50 percent through a discussion group, 75 percent through practice, and 90 percent through immediate application. Program designers therefore stand to gain from using hand-on exercises as much as possible, and from creating and maintaining mechanisms of support while learning is being applied, such as on-the-job support to the learners.

*"Better workshop planning [is needed]: more contact with chair and panelists to
encourage fresh thinking on format, length, and style of presentations."*
- Planning Committee Member

Workshop sessions can strive for better results by placing more emphasis on the participant's learning. In planning a workshop session, consider the demands of the participants and the design of interactive learning exercises and networking. For example, prior to the meeting, conduct a capacity assessment where the focus is on the skills and knowledge required of this profession, rather than a call for proposed sessions where the focus is on the speakers. Paying attention to individual learning styles could also help to structure and communicate the flow, sequence, and pace of activities (including evening social events).

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8 For more information on evaluating networks, see Heather Creech, "Measuring while you manage: Planning, monitoring, and evaluating knowledge networks," International Institute for Sustainable Development, November 2001.

The program could also take advantage of holding the event in a particular place to learn about the country's philanthropy and development issues. For many people, this is their opportunity to gain some knowledge about different countries from a local civil society or philanthropic perspective. Further, the global nature of the WINGS network and the opportunities to learn about different methodologies and approaches to work is a compelling part of being a member. Activities that embrace this interest and expand the experiences and knowledge base of participants are important.

5. Ensure Effective Facilitation

Crucial to the success of the workshop is effective facilitation, particularly in a mixed group where the knowledge and experience base may be diverse. Merely transforming a workshop with presentation to small group breakouts does not always work. A participatory workshop needs skilled design and facilitation in order for it to work effectively. Sample guidelines that can be disseminated to moderators are provided in Box 6.

Box 6: Effective Moderation in a Panel Discussion

Begin preparation by understanding the objectives, the substance, and the audience of the session. The following tips will help ensure that all key actors in the session work towards the same objectives:

- Be clear on roles. A successful moderator is familiar with the topic and has the ability to summarize key points from the discussions. Coach the panelists. A confirmation letter to the panelists should include objectives of the workshop, guidelines for presenting (time allotted for remarks and the format for answering questions), the nature of the audience, expertise of other panelists, topics to be covered, and questions to expect. Being clear on objectives helps to keep the speaker focused and avoid overlap with other presenters.
- Know the audience and introduce them to one another. The audience can be engaged by asking the participants about their level of knowledge using a quick hand survey and by inviting them to share their experiences on the subject.
- Introduce each panelist just before they speak. This breaks up the monotony of each one speaking successively. When introducing the panelists, include a sentence on their value to the panel's objectives.
- Time each panelist. Allocate up to one-half of the allotted time for remarks by the panel, and the remaining half for the question-and-answer portion.
- There are several options during the question and answer period. One option to balance participation in a mixed group would be to ask participants to reflect for a few moments and put the question on cards that the moderator collects and synthesizes. This method may be particularly useful in cases where there is a perceived domination by certain people and in situations where participants are reluctant or not accustomed to speaking in front of a group.
- Summarize highlights of the discussion, topics raised, and any conclusions or next steps.
- Close with a round of thanks to the panelists and the participants.

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6. Use Adequate Communication and Language Tools for a Diverse Audience

The lack of fluency in English language was a barrier to full participation by some of the conference attendees. To the extent possible, interpretation during plenary sessions and workshops should be

provided. While individual interpretation can be cost prohibitive, other grantmaker support organization meetings have hired professional interpreters to work with a cluster of up to two participants in their first or second language. Interpreters require handouts in advance and information about the content, speaker biographies, and audience to adequately prepare themselves for the technical content of the discussions.

Moderators should remind panelists and participants to speak slowly as listeners may not be accustomed to the different accents in English. Speakers should also define any new terms that may not translate into another language and be aware of cultural or geographical nuances.

For participants for whom English is not a first language, providing copies of plenary speeches and workshop outlines in *advance* of these events could be very helpful. In fact, regardless of language abilities, respondents urged that handout*s* from speakers be provided, enabling participants to read about the topic of the workshop in more depth. While the Secretariat is currently in the process of making this type of material available on the WINGS*Forum* website, respondents seemed to prefer receiving this information in advance, or at the very least, concurrently with the related events at the conference.

C. Planning Process

7. Designate and Assign Key Responsibilities During the Planning Process

There are three key and distinct functions for the planning and implementation of a global event such as WINGS*Forum*: 1) fundraising, 2) programming, and 3) logistics. Each of these functions requires specific skills, profile, and dedicated time and effort. These functions need to be overseen by one lead person who, given a Secretariat as small as WINGS, may also be responsible for one or more of these areas of work. Breaking down these functions may be helpful in assessing capacity gaps and strengths, and the budget for the planning of future activities. It is also important for all stakeholders to have a clear understanding of the requirements of each role.

- **Fundraising**: The person responsible for this task is required to have the profile, connections, and skills to communicate the value of WINGS*Forum* and the network, and to use these attributes to ask for money in a way that is compelling to donors. This person must also have contacts and access to donors, or receive significant support in increasing their profile from the Coordinating and Planning committees.

- **Programming**: The person responsible for this task should have experience in learning programs, including needs assessments, learning styles, methodologies to meet specific objectives, and conference/workshop organizing for civil society organizations (specific experience with social change or philanthropy would be helpful).

- **Logistics**: The person responsible for this needs to be detail-oriented and have the ability to multi-task. This function may be partially outsourced to an event coordination firm as was done for WINGS*Forum* 2002. Alternatively, as was done successfully in Thailand, a team of consultants and staff can organize specific aspects of the logistics depending on the capacity of the Secretariat with partial outsourcing for specific tasks.

D. Knowledge Sharing and Learning

8. Consider the Role of WINGS*Forum* in the Flow of WINGS Activities

WINGS*Forum* should not be seen in isolation. It is part of a process and package that is offered by the WINGS network. Some questions to be asked for further planning are:

- How does WINGS*Forum* fit into the sequencing or flow of the other activities, such as the Peer Learning Events?
- How does WINGS*Forum* complement the work that is being done regionally or nationally by other philanthropic support organizations or networks?
- What follow-up is planned to WINGS*Forum*? How will the enthusiasm and momentum be tapped, continued, and expanded? How will WINGS support and sustain the learning and collaboration?
- How will participants connect with WINGS following WINGS*Forum*? Are they aware of the various opportunities and how they can access WINGS' resources?

Additionally, consider designing a knowledge sharing and learning program in which WINGS*Forum* serves as a "port of call" (for example, every four years) with other WINGS activities bridging the span. Box 7 provides an example articulated by a participant.

Box 7: WINGSForum in Relation to other WINGS activities

The frequency and modes of WINGS activities could be linked as follows:

- WINGS*Forum*, as a global event every three to four years, allows for a comparative study
- Regional and topic specific learning events, every year or biennially, allows for in-depth sharing of similar program types and experiences or ideas
- Electronic communication – such as listservs (by topic), website (may include an interactive chat room to brainstorm ideas), or a moderated e-dialogue – helps with follow-through once the members are back home. Electronic communication also allows for on-the-job training and support

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Consider also the new paradigm for capacity development[9] where knowledge is acquired, rather than transferred in a top-down mode. Knowledge acquisition requires an environment of interactive learning that responds more readily to the demands of learners. It relies on group and on-the-job learning. New information and communication technologies are used to expand the learning opportunities. In addition, knowledge sharing experts working in multi-national contexts emphasize shared learning where local knowledge is combined with knowledge acquired from other countries, rather than exporting knowledge from North to South.

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9 "Developing Capacity through Technical Cooperation Country Experiences," Earthscan and UNDP, 2002.

VI.   Appendixes

Terms of Reference

TERMS OF REFERENCE FOR
EVALUATION OF WINGS*Forum* 2006
Request for Proposals

1.   Background
Worldwide Initiatives for Grantmaker Support (WINGS) is a network of over 130 grantmaker associations and support organisations that has provided the opportunity for sharing expertise and experience since 2000. It evolved from a growing recognition that the grantmaker support organisations which nurture and sustain the growing number of grantmakers worldwide, and have contributed strongly to the promotion of philanthropy, need their own forum to share knowledge about common issues related to their support of this segment of civil society. A key activity of the WINGS network has been a regular global meeting, previously taking place in 1998 and 2002. The next will be held in Bangkok in mid-November 2006.

2.   Purpose of evaluation
The broad intention of this evaluation exercise is to assess the effectiveness of WINGS*Forum* as a learning and networking opportunity for organisations in the WINGS network and to review the planning and organisational procedures used by WINGS, in order to make recommendations to the WINGS Secretariat and Coordinating Committee for future gatherings (not only WINGS*Forum* but other, smaller or regional activities also). WINGS*Forum* has set out the following objectives:

- offer professional development opportunities to participants to strengthen their service to their own networks
- enhance the performance of their organisations to strengthen civil society
- ensure that WINGS priorities and plans for the next few years are based on a strong awareness of the needs and interests of the network
- showcase learning and accomplishments, and in particular raise awareness of the nature and quality of work in the Asia-Pacific region where the event will take place
- demonstrate and inspire collaborative work

There is an added dimension to this event, of considerable importance to the network: the WINGS Secretariat will be moving to the Philippines at the start of 2007. WINGS*Forum* is an opportunity for us to emphasize this move, introduce the new Director of WINGS, and make a special effort to have full participation of our network members and new contacts from Asia-Pacific.

We want the evaluation, therefore, to assist us in determining whether these objectives have been met by the gathering itself, and to assess in this context its content, its style of planning and preparation and any plans for follow up activities. This should include some exploration of how far the event has contributed to the preparations for the WINGS Secretariat's move to south east Asia in January 2007.

3.   Procedure
The evaluation will focus on the event itself, i.e. the main WINGS*Forum* from 16-18 November, and on two day-long satellite meetings on 15 November and a debriefing meeting of the Programme Planning Committee on 18 November immediately after the closing plenary.

We assume that the chosen evaluator will wish to on draw upon a variety of evaluation instruments to gather information (e.g. online member surveys, telephone interviews, and individual face-to-face interviews or focus groups at WINGS*Forum* 2006, as well as feedback forms used at the meeting). We will welcome proposals outlining an appropriate level of information-gathering from the whole network, from those network participants who come to WINGS*Forum*, and in more depth from samples of members of the network, of WINGS Coordinating Committee, WINGS*Forum* Programme Planning Working Group, satellite meeting working groups, and the small staff group based in Brussels.

We expect the evaluator to attend WINGS*Forum*, and assume that other contact with the Secretariat, committees, working groups and the network will be by electronic means or by telephone, and that the evaluator will work from his/her normal office base. The Secretariat will not expect to provide logistical or administrative support other than that needed for attendance at WINGS*Forum*, though every effort will be made to ensure that the evaluator has access to material on WINGS*Forum*, the structure and organisation of WINGS, and network members, as needed for the evaluation process.

Initial questions from WINGS include:

- Were the inputs to WINGS*Forum* 2006 (planning time, funding, clarity of aims and objectives, staffing, timing, etc) appropriate, adequate and necessary?
- How have the various WINGS planning groups functioned, within themselves and in relation to each other? Have their responsibilities been clear?
- Have communications mechanisms been appropriate?
- Was WINGS*Forum* 2006 significant and useful for the network? Were topics and speakers relevant to network needs? Did planning and logistics contribute to meeting objectives for the event?
- Did organisations in the WINGS network modify their own planning and working methods or their programme activities as a result of WINGS*Forum*?
- Did WINGS*Forum* create new opportunities for WINGS, or help in planning and prioritising WINGS' activity for the next period of work?
- Has WINGS*Forum* contributed to the strength of the global network of grantmaker support organisations? Are there new messages for WINGS staff and Committee members as a result that could modify plans and programmes?
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4. Deliverables and scope of work
WINGS expects the following to be submitted to the WINGS Secretariat:

- An outline plan for the evaluation within three weeks of signing a contract to carry out the work. This plan should include a list of the evaluation tasks to be carried out, the timeframe for each task, and information about proposed methodology.
- A final report by 15 January 2007. This final report should include the evaluation of the process of preparing for and implementing WINGS*Forum*, an analysis of the event's programme offerings and networking opportunities in terms of their relevance and usefulness to the participants, and an overall commentary on the structure, substance and outcomes of the meeting. It should also explain the methodology employed by the evaluator and list those interviewed and consulted in the evaluation process.
- The WINGS Secretariat would also welcome sight of any interim report before Christmas 2006 in order to assess progress on the part of the evaluator and take opportunities to ensure that sufficient information has been made available to the evaluator.
- The final report should be presented to the Secretariat in electronic format to be shared with both staff and committee members of WINGS

We assume that the time needed for scoping, conducting and reporting on the evaluation will be about 15 days, inclusive of travel to and attendance at WINGS*Forum*. WINGS will cover the cost of travel,

accommodation and meals for time spent in Bangkok, and reasonable costs for telephone calls, and other necessary expenses associated with the work. Daily fees may be paid in two installments, on receipt of an invoice from the evaluator: one after WINGS*Forum* and a final payment within one month of receipt of the final report. Other expenses will be reimbursed based on the submission of original receipts.

5. Supporting information

More information about WINGS and the organisations in the network may be found on the WINGS website < www.wingsweb.org >. The WINGS*Forum* website at < www.wingsweb.org/forum06 > provides detail of the event. The final page of this document is a brief description of WINGS for anyone unfamiliar with the purpose and structure.

6. Selection of evaluator

WINGS invites proposals by 14th September 2006, sent to wings@efc.be and including

- a description of proposed methodology and timetable for the work (we envisage between 1,200 and 2,500 words for this section)
- a brief CV of the evaluator and any appropriate description of his or her organisation, including full contact details
- supporting information, including a note of any particular experience or knowledge of grantmaker support organisations, and of evaluation work involving organisations beyond the evaluator's normal national base (this note to be up to 600 words)
- contact details of two referees, preferably previous clients for similar work
- detailed budget for the work including a clear indication of the daily fee rate

WINGS will shortlist within a week of the deadline and aim to conduct interviews by telephone with shortlisted candidates in the week beginning 25 September.

August 2006

WINGS-CF and WINGS-CI Satellite Meeting Evaluation

I. introduction

Within WINGS, constituent groups have formed to address the unique needs and interests of two specific sectors within the membership.

WINGS-CF (Community Foundations) was formed to address the unique needs and interests of organizations supporting the development and work of community foundations. WINGS-CF meets independently, approximately every two years, and schedules meetings to coincide with WINGS*Forum* held every four years. Approximately 80 organizations comprise the membership of WINGS-CF.

WINGS-CI (Corporate Initiative) was organized by the associations and support organizations in the WINGS network that promote corporate philanthropy and provide services to corporate grantmakers. WINGS-CI also meets independently and is a relatively new formation within WINGS. Approximately 30 organizations comprise the membership of WINGS-CI.

II. evaluation Methodology

The WINGS Secretariat requested that an evaluation of the WINGS-CF and the WINGS-CI satellite meetings, immediately preceding WINGS*Forum,* be part of the overall assessment.

The tools that informed the evaluation and this report include meeting minutes from the WINGS-CF and WINGS-CI Planning Committees; the objectives developed for the evaluation and as presented in the TOR for evaluators; personal interviews with WINGS-CF and WINGS-CI participants, and Planning Committee members; and evaluation forms completed by participants.

The rate of return of the evaluation forms was 40 percent for the WINGS-CF meeting and 25 percent for the WINGS-CI meeting. The rate of return was particularly low for the WINGS-CI meeting because the meeting facilitator did not remind participants to complete the evaluation during the meeting.

The evaluation form developed for the WINGS-CF and WINGS-CI meetings was identical and similar to WINGS*Forum* evaluation. The questions were meant to provide feedback on whether overall objectives were met and the aspects of the meetings that participants felt were the most and least relevant. Two survey questions asked respondents to identify services members would like to see provided by WINGS and to determine the kinds of events and meeting formats members preferred.

IV. WINGS-CF Evaluation

The 2006 WINGS-CF satellite meeting engaged 68 participants in a daylong meeting that was planned and coordinated by nine Planning Committee members. The theme that the planning group focused on was *building development capacity*. The day that included two plenary addresses and concurrent workshops. It concluded with a summary session to capture significant learning points from the workshops and a business meeting for the WINGS-CF group.

The overall response to the WINGS-CF meeting was very favorable. This is significant in general, but particularly in this case, due to the fact that the keynote speakers for the opening WINGS-CF plenary did not show up. This could have set a disappointing tone for the entire meeting, and while dissatisfaction was expressed by two respondents, the majority of respondents did not identify the lack of keynote speakers as a problem.

1. Objectives

WINGS-CF participants responded favorably to the questions meant to measure if meeting objectives were realized, as demonstrated in the figure 11:

Figure 11:
WINGS-CF Evaluation Summary
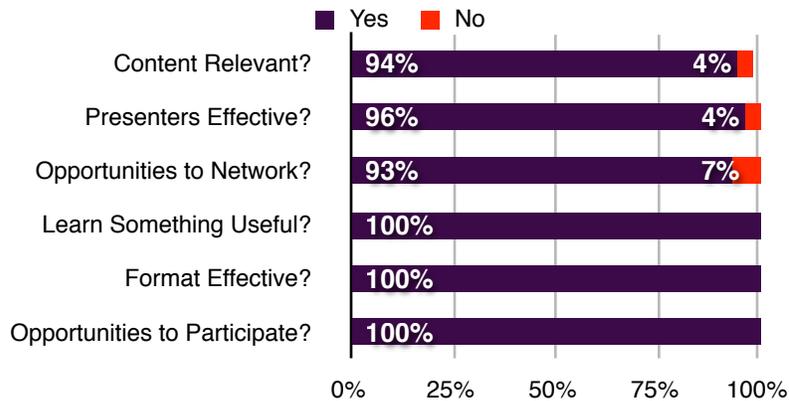
2. What Participants Liked Most

There was some degree of shared experience regarding what elements of the CF meeting respondents liked most:

- Nineteen percent (19%) of respondents cited networking, and the opportunities to share experiences and learn from peers as what they appreciated most
- Related to this, workshops that facilitated a "*high degree of participation and an exchange of ideas*" and "*allowed for questions, feedback, sharing of ideas and strategies*" were favorably noted by 15 percent of the respondents
- Nineteen percent (19%) of the respondents valued the "*variety and range*" of workshops; those that emphasized discussion among participants versus presentations by speakers were singled out as being most relevant
- Fifteen percent (15%) of the respondents cited the workshops on *Developing Local Leadership* and *Rural Philanthropy and Community Development*, as what they liked most about the WINGS-CF meeting.

3. What Participants Liked Least

The majority of respondents answered "none" or "not applicable" to this question. Beyond that, there was a great deal of variation in the responses. However, there was overlap in some of the concerns or issues raised in WINGS*Forum* evaluation. These include:

- Request for a "*practical applications track*" as opposed to "*too much theory*." Suggestions ranged from sessions that would help with marketing support organizations to donors, to best practices for community foundation support organizations.
- Language difficulties. There was a lack of formal translation services or supports, and participants for whom English was not a first language were unable to adequately translate for themselves
- Related to this issue, respondents suggested that handouts with more session content be provided to help participants better understand the specifics of the workshops and to follow the presentations.

4. WINGS Services

Strong interest in continuing dialogue, resource and information sharing, and peer learning was expressed when considering what additional services WINGS could provide. Identical suggestions or ideas with slight variants to the responses listed below emerged via the evaluation for WINGS*Forum*. The related suggestions include:

- Creating new communication channels and opportunities for information sharing. Specific ideas ranged from establishing electronic listserves to publishing guides and toolkits on a variety of topics, such as best practices among CF support organizations and strategies for financial sustainability and fundraising.
- Requests included calls for general listserves that provide information regarding trends in the field and updates regarding the efforts and innovations of WINGS-CF members, as well as "segmented" listserves that would provide opportunities for members within regions or sectors to communicate more consistently.
- Peer learning events and "on the job training" via staff exchanges were suggested multiple times. Corresponding with this request was the suggestion that WINGS build its scholarship fund to facilitate more peer exchanges and face-to-face meetings.
- Overlap in CF and CI meetings. Two requests for combining this meeting were put forth, as well as a suggestion for sharing resources between the two groups, such as speakers.

5. Meeting Preferences

This question asked respondents to identify what types of venues WINGS-CF members preferred. The following responses should be compared with feedback from the business session that occurred at the end of the day:

- Meet biennially or annually
- Hold regional meetings on an annual basis in between WINGS*Forum* meeting
- Facilitate annual peer learning events with a CF support organization as the site and focus of the meeting, using a case study or best practice approach to learning
- Make better use of technology to support on-going learning, share research, and facilitate collaboration

V. WINGS-CI Evaluation

The 2006 WINGS-CI satellite meeting brought together 44 participants for a daylong meeting that was planned and coordinated by eight Planning Committee members. The theme guiding this satellite meeting was *building community capacity for engaging business*. The planning group created an agenda that included two plenary addresses, concurrent workshops, and a meeting to address the future of WINGS-CI.

1. Objectives

According to the respondents, the overall response to the WINGS-CI meeting was favorable as demonstrated in Figure 12. The greatest differential was in response to the format of the meeting ,indicating that over one third of the respondents felt that the format was not effective. The other most frequently cited critique, at 27 percent, was the sense by respondents that the current purpose and future of WINGS-CI lacked focus.

Figure 12:
WINGS-CI Evaluation Summary
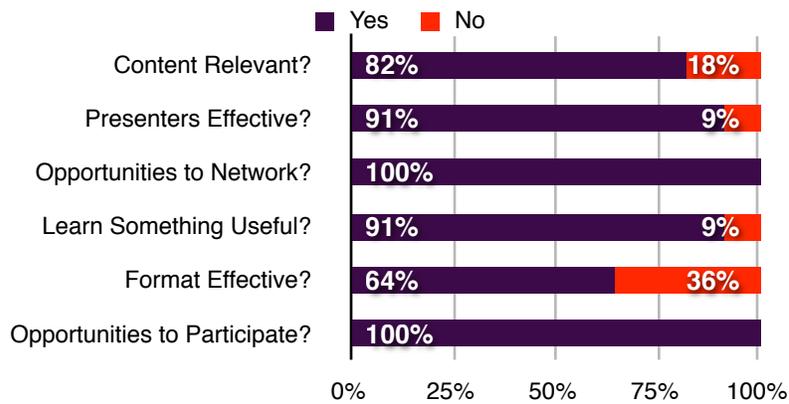
2. What Participants Liked Most

Fifty-five percent (55%) of the respondents commented favorably on the plenary session with Dr. Mechai Viravaidya, Founder and Chairman of the Population and Community Development Association. He encouraged the audience to consider a new paradigm for the development of the civil society sector that combines business entrepreneurial tools for social benefit in a presentation entitled, *A Time for Thinking Out of the Box and Staying Ahead of the Pack*. Descriptions as to reasons why this speaker may have resonated with respondents included, his "*honesty*" and "*candidness*," and "*an opportunity to learn*."

There was some degree of shared preference regarding what else worked best and / or was appreciated the most about the CI meeting:

- Forty-five percent (45%) of the respondents noted that networking and the "*opportunity to exchange ideas at the concurrent sessions*" (workshops) was an element of the meeting that was most favorable.
- Related to this, other respondents commented on the caliber and "*high profile*" of speakers and participants alike, and the opportunity for learning.

3. What Participants Liked Least

Thirty-eight percent (38%) of the respondents answered "none" to the question of what did not work. However, as mentioned above, respondents commented on the lack of clear purpose for WINGS-CI and uncertainty about the future of the group. In addition, 38 percent of respondents cited the "inconclusive" closing session as problematic, attributing this to poor facilitation, the absence of a "closure" methodology, and inadequate time allocation to the topic. Twenty-five percent (25%) of respondents felt that there was a lack of understanding regarding corporate philanthropy within the group.

The final critique was cited by only one respondent, but corresponds to a concern that was expressed in the WINGS*Forum* evaluation regarding the lack of handouts and written, support materials.

4. WINGS Services

As was the case with respondents to the WINGS-CF evaluation, strong interest in continuing dialogue, resource and information sharing, and peer learning was expressed by CI members when considering what additional services WINGS could provide. Identical suggestions or ideas with slight variants to the responses listed below emerged via the evaluation for WINGS*Forum*. The related suggestions included:

- Seventy-three percent (73%) of the respondents cited creating new communication channels and opportunities for information sharing. Specific ideas ranged from establishing electronic listservs, to WINGS playing a stronger role in being an information distribution center for relevant reports, cases studies, innovations in the field.
- Twenty percent (20%) of the respondents suggested peer learning events among specific groups such as membership associations.

5. Meeting preferences

Eighty-eight percent (88%) of respondents requested more frequent and intensive meetings to share experiences and learnings. Specific requests included:

- Meeting annually
- More peer learning events or other opportunities to share best practices and to discuss trends in corporate philanthropy

Methodology

Several instruments and procedures were used as part of the evaluation process for WINGS*Forum,* and the WINGS-CF and WINGS-CI satellite meetings. These included:

1. Terms of Reference
The Terms of Reference (TOR) described the objectives of WINGS*Forum*. These objectives served as a launching point for determining what should be measured in an evaluation form. (See Appendix 1)

2. Document Review
The Evaluation Team reviewed documents available from the WINGS Secretariat, including the evaluation of WINGS*Forum* 2002, minutes from planning meetings, and others. The documents allowed the Evaluation Team to get a flavor of the planning process. In addition, the Evaluation Team consulted general documents on networking, evaluations, and workshop formats.

3. Survey
A short survey was developed and submitted to all members of the Coordinating and Planning committees. Four committee members responded to the survey, answering the following questions:

- What do you want to learn from the evaluation?
- What indicators would demonstrate success?
- How will the results be used?

4. Evaluation Forms
A four-page evaluation form was developed that was based on document reviews and examining other assessment and evaluation forms. The Council on Foundations and Grantmakers Without Borders (members of the WINGS network) were helpful in assisting with this process by sharing their conference evaluations.

A decision was made not to evaluate individual sessions because of the short timeframe for completion of the evaluation report, reaction from committee members who preferred to have an overall perspective, and the best practice employed by Grantmakers Without Borders.

The evaluation form was then submitted to several people with expertise in surveys, training, and working with an international audience who reviewed the form to ensure its relevance, ease of use, and appropriate and clear use of language.   The form was also submitted for review and approved by the Secretariat staff.

One page evaluation forms were also created for the WINGS-CF and WINGS-CI satellite meetings. These forms were informed by the same sources listed above. In addition, they were influenced by the notes of WINGS-CF and WINGS-CI planning meetings, leading up to the one-day, pre-conference events.

All the evaluation forms for each event (WINGS*Forum*, WINGS-CF and WINGS-CI satellite meetings) were placed in the program packets handed out at the registration. An announcement was made once on the last day of WINGS*Forum* and forms were again handed out at the conclusion of the conference. The form was not distributed at the WINGS-CI meeting, but was handed out at the conclusion of the WINGS-CF meeting. The forms were again distributed electronically by the WINGS-Secretariat two weeks after the event.

For future meetings, the Evaluation Team would suggest that the Secretariat and Coordinating Committee communicate and endorse the importance of the evaluation as a means to improve the service to the membership. Only one announcement was made regarding the evaluation during "housekeeping" at WINGS*Forum* and none made at the WINGS-CI satellite meeting.

The response rate was:

- WINGS*Forum* at 34 percent or 54 out of 161
- WINGS-CF satellite meeting at 40 percent or 27 out of 68 participants
- WINGS-CI satellite meeting at 25 percent or 11 out of 44 participants

The response rate via the evaluation forms was disappointing. However, the feedback provided through different methodologies with a cross-section of participants provided a rich and substantive set of data for the report.

5. Interviews with Participants and Committee Members During WINGS*Forum*.

Twenty interviews were held with selected individuals with an eye towards ensuring diversity by region and type of organization. First time participants (42 percent) as well as participants who had attended another WINGS activity (52 percent) were interviewed. The interview questions focused on the participants' expectations, needs, and impressions of WINGS*Forum* offerings. The interviews provided thoughtful reflection on WINGS*Forum,* supplemented the evaluation form responses, and were consistent with the evaluations, as well as among interviewees.

6. Secretariat Debriefing Meeting

On the last day of WINGS*Forum*, Ms. Sera conducted a meeting with the WINGS Secretariat staff and consultants to debrief on the planning process. The discussion focused on critical logistical elements that could be improved or should be considered for the next WINGS*Forum*. Feedback included aspects of registration, timing, venue, process / teamwork, communication (announcements and website), on-site logistics.

7. Planning Committee Debriefing Meeting

At the conclusion of WINGS*Forum*, Ms. Sera facilitated a 45-minute meeting with the Planning Committee. Each member of the committee was asked to write down his or her responses to two questions: "What worked?" and "What didn't work?" Ms. Sera synthesized some of the responses, including the ones where there seemed to be consensus (i.e., plenary speakers and logistics worked) and where there seemed to be some variance.

8. Timeframe of the Evaluation Contract

The contract between the Evaluation Team and WINGS did not start until October 30, 2006 because of the interruption in the planning of WINGS*Forum* due to the coup d'etat in Thailand. This meant there was less than 2 weeks to design the methodologies prior to the start of WINGS*Forum*. Because of the transition from Brussels to Manila, WINGS also required that the evaluation be completed by mid-January. Given the timeframe, the evaluation focused on "reaction" of the participants at the conclusion of WINGS*Forum* to determine what participants liked and disliked and what they found relevant and effective. The evaluation team decided to forego a survey that would look at the "impact" of WINGS*Forum*, given the short timeframe to complete the evaluation, as well as the limited responses received by the previous evaluators (WINGS*Forum* 2002) on this type of questioning.

Evaluation Form

Evaluation
WINGS*Forum* 2006
Making a Difference in Philanthropy
Bangkok, Thailand
November 16-18, 2006

Dear WINGS*Forum* participant,

This evaluation will assess WINGSForum and provide suggestions for future WINGS gatherings. The evaluation is also critical to help in the transition of the WINGS Secretariat to Philippines in January 2007. The results of the evaluation will be made available on the WINGS website.

Thank you for sharing your thoughts about WINGS*Forum* through this evaluation. Your comments are invaluable to ensure that WINGS continues to meet the needs of its membership.

A. PARTICIPANT BACKGROUND

Please check ☑ one response.

1. What region of the world is your organization's headquarters located?

    - ☐ Africa
    - ☐ Asia / Pacific
    - ☐ Europe
    - ☐ Latin America / Caribbean
    - ☐ North Africa/ Middle East
    - ☐ North America

2. Which of the following descriptions best characterizes your organization?

    - ☐ Emerging organization (less than 3 years old)
    - ☐ Mid-range organization (3-9 years old)
    - ☐ Established organization (10-15 years old)
    - ☐ Mature organization (over 15 years old)

3. What is your primary title or role in your organization?

    - ☐ Board Member / Trustee
    - ☐ Executive Director / CEO / President
    - ☐ Program Staff
    - ☐ Other

4. Is your organization a member of WINGS?

    - ☐ YES
    - ☐ NO

B. Objectives and Experience

Please refer to **overall experience** [workshops, plenary sessions, networking and social activities, and exhibits] when responding to these questions.

Please check ☑ the box indicating YES or NO response.	YES	NO
1. Did the WINGSForum provide professional development opportunities to strengthen the service to your own network?		
2. Did the WINGSForum raise your awareness of the quality of work in the Asia Pacific Region?		
3. Did the WINGSForum provide you with ideas about areas in which to collaborate with other WINGS members?		
4. Did the WINGSForum provide adequate opportunities for networking?		
5. Did the WINGSForum include presentations from different regions of the world?		
6. Will the WINGSForum enhance your organization's performance in strengthening civil society?		
7. Will the WINGSForum make a difference in your organization's programming?		

8. What elements of the WINGSForum did you like the most and why?

9. What elements of the WINGSForum did you like the least and why?

C. Logistics

Please check ☑ the box indicating YES or NO response.	YES	NO
1. Was the on-line registration process clear?		
2. Was the cost of attendance (registration fee, travel costs)		
3. Was the information you received prior to the WINGSForum		
4. Was the hotel meeting venue appropriate for the WINGSForum?		
5. Were the logistical operations during the WINGSForum efficient?		

6. Please provide any comments on logistics.

D. Workshops

Please refer to **overall concurrent workshops** when responding to these questions.

Please check ☑ the box indicating YES or NO response.	YES	NO
1. Was the overall content of the workshops relevant to your work?		
2. Were the workshop presenters able to convey information effectively?		
3. Were there adequate opportunities to network with other participants during the workshops?		
4. Did you learn something you can use from the workshops?		
5. Was the format of the workshops effective?		
6. Were there opportunities to participate during the workshops?		

7. Please share your thoughts -- positive or negative -- on **3** workshops you attended. For each workshop, please focus your comments on:
  - ✓ **Effectiveness of the workshop format**
  - ✓ **Relevance of the content and topic of the workshop**
  - ✓ **Expertise of the speaker**

  (1)   Title of Workshop _____

  (2)   Title of Workshop _____

  (3)   Title of Workshop _____

E. WINGS

Your responses below will be used as suggestions for the future planning for WINGS.

1.   What topics would you like to see addressed at future WINGS gatherings?

2.   What kind of gatherings do you prefer, including how often the network should meet, what type of meetings (global / regional / electronic), purpose of meetings, etc.

3.   What services would you like to see WINGS provide to meet the needs of the membership?

4.   As a result of the WINGS*Forum*, how would you consider getting more actively involved in WINGS?

F. additional comments

Please provide any additional comments.

Optional: Please provide your name, organization, and email contact for follow-up.

Thank you for completing the evaluation!

Workshop Design

DESIGNING A KNOWLEDGE SHARING AND LEARNING ACTIVITY [10]

The design of a workshop is crucial to the success of a knowledge sharing and learning activity. This section suggests planning steps for the design of the activity and descriptions of commonly used face-to-face workshop formats. To ensure success, the organizer of the activity should have skills and experience in designing knowledge sharing and learning activities. When planning and designing the activity, some steps to keep in mind are:

1. **Know the audience.** A global membership like WINGS is composed of a diversity of profiles, perspectives, learning styles, roles and responsibilities, and motivations for learning. Ideally, a needs assessment should be conducted to determine capacity strengths and gaps, as well as determining the required skills and knowledge necessary for job function.

2. **Clarify and communicate the objectives.** Objectives should be results-oriented so the effectiveness of activities can be monitored and measured. These objectives should relate back to the audience, specifically their main responsibility and how the content of the activity links up with what is on their plate.

3. **Select the appropriate format and methods.** The format should take into account the diversity of the audience and the objectives. Decide whether a face-to-face meeting is necessary, or alternatively, if information can be disseminated electronically through e-learning or the resource library. Keep in mind that some people are not accustomed to participatory learning styles and it may take time for them to get comfortable with new formats.

4. **Design the flow and sequencing of the sessions.** The sessions or activities should be sequenced to build on each other and take into account the need for breaks, timing (for example, participants may have low energy in the afternoons), and breakout vs. plenary sessions. In a conference-like event, sessions could be organized in "tracks" so that participants can facilitate their own learning.

5. **Identify resource people and facilitators.** Resource people should be knowledgeable about the subject and have the ability to communicate key concepts, knowledge, and skills. Effective facilitation skills are crucial to any workshop format. The facilitator's main role is to guide the group to meet its desired session objectives and to take charge of the process for the session. The facilitator should also ensure active and balanced participation.

6. **Monitor and evaluate the effectiveness of the activity**. Tracking and monitoring of the outcomes of the activities and evaluating the effectiveness of the activity will help to move the organization's goals forward by responding to the membership's needs.

7. **Plan for follow-up activities.** The planning should consider how the activity fits into the overall organizational program. Thought should also be put into the follow-up communications, actions, and events to keep the participants engaged.

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10 This section prepared by Yumi Sera based on experience in designing and implementing multicultural / multilingual workshops. Information from a resource pack developed by Najma Siddiqi (and group of learning specialists) of the World Bank, *Enhancing Performance through Knowledge and Learning, Environmentally and Socially Sustainable Development Network,* World Bank, 2005 was used to develop this section.

Workshop Formats

The face-to-face workshop formats described here take into account a diverse, multicultural / multilingual audience, cases where there are dominant and reserved participants, and individuals who may possess different levels of knowledge on the subject.

Panel Presentation

The most common format used at WINGS*Forum*, the panel usually consists of three presenters and one moderator. Tips for a successful panel presentation are:

- The moderator should be familiar with the topic and have the ability to synthesize the main points. (See role of moderator in Section V. Recommendations)
- The presenters should be <u>well prepared</u> with a background paper, notes, or a formal presentation. The presentation not only provides information, but sets the background for discussions. Presentations should be paced in order to leave adequate time for discussion among participants.
- Handouts should be prepared so that participants can 1) follow the key points and 2) take the information back to work to read more in-depth and / or share with colleagues.
- A suggested presentation structure follows:
  - ➡ A short description of the current situation as an introduction
  - ➡ Issues and problems in the area / subject addressed
  - ➡ Challenges and lessons learned
  - ➡ Experience developed and practices applied in an effort to give solutions
  - ➡ Future steps
- Schedule adequate time so participants can ask clarifying questions after each presentation. A question and answer session can follow all the speakers with the moderator synthesizing the key points from each of the discussion.

Small Group Breakouts

Small group discussions or break-out groups are often peer-led activities designed to put participants in charge of their own learning. This approach should be used when participants include individuals who have extensive knowledge and experience on a topic and that they can engage in a discussion.

The value of this format is that it maximizes peer discussion. This format can be a challenge in a group where the knowledge base is limited, or where the participants may be unfamiliar with participatory styles. It may also be an unbalanced discussion if there are one or two people in the group who have a lot of experience and / or who dominate the group. In an unfamiliar audience, it works best when this type of break-out is done after participants have become more comfortable with each other.

Common steps for a small group breakout are:

- Introduce the topic of the discussion, giving very clear instructions. Writing down the instructions and questions on the board (flip chart / overhead screen) helps to keep the participants focused.
- With a mixed group like at WINGS*Forum*, the organizer of the session may want to assign participants to their small groups depending on the objectives of the session, for example, grouping by region, by level of knowledge / experience, or by type of organization.

- Assign a small group facilitator who has been coached by the organizer with instructions prior to the session to help manage the group dynamics and dialogue. This facilitator can also report back on any factors of concern.
- The facilitator should walk around each group to ensure that they are staying on topic and to get a gist of the discussions. This will also allow the facilitator to incorporate their points into the conclusion or synthesis.
- A recorder should be designated within each group to synthesize the key points made in the small group and to report back to the group at large. They could be provided a template to respond to specific issues which will also help the group to focus. If time is limited, the facilitator can ask them to post their charts on the wall so people can walk around the "gallery" to get a sense of the conversation. The recorders' notes can be used for the proceedings.

Buzz Sessions

Buzz sessions are used to allow a brief break to focus and reflect on a specific topic after a set of inputs have been provided in a larger group. This helps participants organize their thoughts, cross-check or share their interpretations with their peers, and develop responses, comments, or questions to ask the presenters or panelists. This format could be especially useful for WINGS*Forum* where there is a multilingual audience and a perceived dominance of certain people. The format could also work well in plenary sessions where people are seated at roundtables. Following the plenary address:

- A facilitator gives instructions (written and orally) to the participants. Questions (not more than 3) can be shown in an overhead slide. Give a timeframe (5-10 minutes).
- Have one person report out with a question or comment.
- Alternatively, have the group write the question or comment on a card for the facilitator.
- The facilitator moderates and processes the feedback.
- A recorder writes the responses on a flip chart or overhead screen. With cards, they can be posted on the wall for a gallery display.

Mini Case Study

The purpose of a mini-case study[11] would be for participants to practice and apply what they may have heard in a preceding presentation. Depending on the objectives, audience, and timeframe, there are different ways to use this methodology. For a limited two hour timeframe:

- Prepare a mini-case that is not more that two pages long using bullets for: context, background on program, challenges, and current situation. End the case with questions that will frame the discussion. A case based on a real situation makes this more lively and realistic.
- Start with expert presenters who can speak clearly on the subject. The first presenter can provide a framework with clear guidelines and the second one can follow with a real example, similar to the case. Moderate a question and answer session focusing on the framework.
- Break out into small groups (10-15 people) with a designated, case method facilitator (can be one of the presenters). The facilitators should have required skills and be provided specific instructions on the methodology and objectives.
- Each group should be provided with a template on what ideas need to be presented back to the larger audience enabling an "apples-to-apples comparison." This can be done in the form of questions from the case study. The template helps guide participants through the important learning points, rather than using time to discuss who / how it will be presented. To make room

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11 The case study method is a method practiced in academic settings, as well as in workshops. For expertise on this methodology, contact Tya Adhitama (Indonesia), a WINGS*Forum* participant.

for "other learnings," add in a blank box on the answer sheet. The notes can serve as documentation for proceedings.
- Small groups should report back to the plenary to compare responses and lessons. The moderator should synthesize the lessons learned and recount the end of the true story. Depending on the situation (for example, if this is also a team building experience), moderators may want to debrief on how the interaction went in the groups as an additional point of learning.

Reflection

In reflection exercises, participants are given time to think about what they have experienced in a given context and then asked for their response and interpretation of the experience; the learning related to it; and its applicability in the context of their everyday work / life. The tools for initiating a reflection could be the day's events, film, a field trip, a game, a brief presentation, story telling, etc. This format was used in WINGS*Forum* and WINGS-CF satellite meeting to reflect and get feedback on the days' activities. It may be especially useful in cases where some participants prefer having a chance to process internally, and where some participants are more verbose than others. Some suggestions for a reflection session:

- The reflection can be done individually or in a small group, for 2 minutes or an afternoon depending on the purpose, scope, and length of the workshop.
- The reflection is introduced by inviting participants to focus on an experience that they have had. Specific instructions need to be given for the reflection exercise.
- Close the session with how the participants could apply this to their current situation.

Dialogue

Dialogue can be effective in situations where there is a topic of common interest and participants who want to come to an understanding, appreciate other perspectives, or find solutions to a problem. In an expertly structured and moderated dialogue, there is two-way or multi-track flow of communication, a healthy balance between listening and speaking for all participants, and some collective reflection time for all. Key aspects of a constructive dialogue are:

- Strong moderation and facilitation skills are critical to design and guide a dialogue. The facilitator's role is to set the context, develop ground rules, explain the process and expected results, moderate the dialogue, and synthesize the responses. The facilitator also needs to ensure that active listening is taking place and connect the threads to be coherent with the objectives.
- Dialogue should have clearly stated objectives that match participants' expectations. The lack of clarity can create confusion, contradictory expectations, and miscommunication. It can also cause the discussion to "drift" and frustrate participants whose expectations are not being met.

Role-play plus Debrief

The purpose of the role-play is to understand the dynamics of a situation and why a person may be acting in a certain way. Role-plays can be fun and generate energy and enthusiasm, but it does take time to get into the roles and to debrief the learnings. This may be a good option to use when people are sleepy from jet lag. It is especially useful in a multi-stakeholder format where people have opposing views and participants can take the roles of the "other side." The role-play could be with the whole group, or a part of the group playing roles in a "fish bowl," while other participants observe.

- Provide a mini-case study to all the participants. The case should include the context, stakeholders and their positions, and problem they are addressing. It should be a situation that is familiar to participants.
- Distribute instructions to each participant. The instructions (not more than a paragraph) state which role the person has and how they are to act. You may need to have some of the actors leave the room to brief part of the audience.
- Select observers to report back on what they observed.
- Start the role-play action and have participants assume their roles for at least 15 minutes.
- Once the action (and laughter) has subsided, ask the observers to report on the dynamics and each of the positions. Then ask the actors how they felt in their particular role.
- Debrief the role-play by focusing on lessons learned, including behaviors and actions that could prevent something like this from happening.

Site Visit plus Reflection

The purpose of the site visit to a community organization is to provide an eye-opening and memorable perspective to the participants. It helps the visitor to leave the comforts of the hotel venue and experience the local environment. In order for this to be effective, allocate sufficient time for preparation and debriefing. The community organizations also need to be prepared for the visit. Going to an office to hear a presentation is not always useful, but walking around a village and meeting with the community members working on the project could add value to the workshop. Depending on the location of the meeting and number of participants, this could take a full day and logistical coordination with 2-3 sites (including buses, lunch boxes, and interpreters).

- Outline the objectives of the site visit. For example, the objective could be to see how a local grantmaker support organization works with grantmakers and the community to support philanthropy or local development.
- Prepare the 2-3 sites for the visits and describe the meeting's objectives with participants. Clarify any expectations. WINGS could work with a local grantmaker support organization to help coordinate the visits. Keep in mind that the site visits also take the time of the community members.
- If this is a skills training workshop, the timing of the site visit works well when it is in the middle of the event so that participants can have a chance to apply their learnings and debrief. If the site visit occurs prior to the workshop, it can be used as a team building exercise.
- The afternoon prior to the site visit, have the organization provide an overview of the project. Brief the participants on expectations and any instructions on the visit.
- Board the bus early in the morning for the site visit (try to avoid rush hour traffic).
- At the site, meet with a diverse group of people to get their viewpoints – include women, youth, elderly, and community leaders. In some countries, a meeting with local government officials to share their perspectives may be required.
- In the evening or next morning, reflect on what the participants experienced and relate this to the workshop objectives.