WINGS-CF
2002 Peer Meeting

Sydney, Australia
March 9, 2002

Worldwide INitiatives for Grantmaker Support – Community Foundations

Acknowledgements

The WINGS-CF 2002 Peer Meeting was held in conjunction with WINGSForum, the meeting for the larger WINGS network. For information relating to WINGSForum (March 10 - 13, 2002 in Sydney) go to www.wingsweb.org.
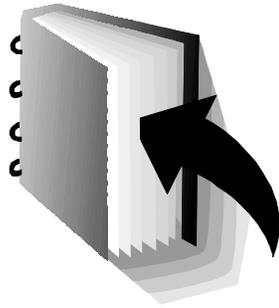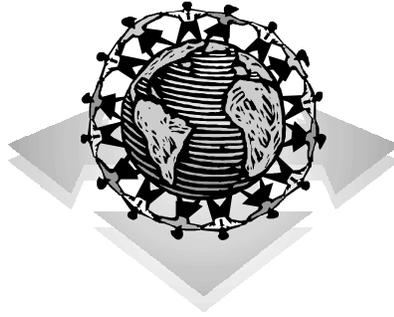
Table of Contents

About WINGS-CF

A part of the overall WINGS network, WINGS-CF includes organisations supporting the development and work of community foundations[1] in different areas around the world. Some of these organisations first came together in 1998 in Miami Beach, USA, the report for which proved to be a useful and popular resource around the globe. The Charles Stewart Mott Foundation (US) provided support to update that report and in April 2000, a new report called *Building the Worldwide Community Foundation Movement* was published. This report includes an exciting piece of work describing *The Growth of Community Foundations Around the World*[2]. The newly named WINGS-CF network came together in Ottawa, Canada in May 2000 and agreed to a set of priorities and activities for the period 2000 to 2002.

The WINGS-CF Secretariat has been hosted by Community Foundations of Canada from 2000 to 2002. In 2003, it will rotate to the European Foundation Centre (Belgium), another participant in the WINGS and WINGS-CF networks.

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[1]   A community foundation is "an independent philanthropy organisation working in a specific geographic area which, over time, builds up a collection of endowed funds from many donors, provides services to those donors, and makes grants and undertakes community leadership and partnership activities to address a wide variety of needs in the community." (Suzanne Feurt, Council on Foundations, page 7, *Building the Worldwide Community Foundation Movement*, April 2000)

[2]   Written by Eleanor W. Sacks, the report was co-published by the Council on Foundations and WINGS-CF

Welcome and Introductions

Making a Mark on the World

Delegates representing 22 countries gathered early on Saturday morning for breakfast, all having travelled long distances to reach Sydney. Over breakfast Monica Patten, Community Foundations of Canada, and Chair of the WINGS-CF Advisory Committee, welcomed delegates, noting the inspiring, daunting and overwhelming range of interest and experience in community foundations, and in making new connections to enable community foundations to grow.

As a vivid illustration of the worldwide spread of community foundations, delegates

Max Legodi, South Africa

introduced themselves country by country, placing a sticker marking their home on a wall map of the world. Countries represented included: Australia, New Zealand, the UK, Canada, the US, South Africa, Russia, Poland, Slovakia, Mexico, the Philippines, Kenya, Germany, Brazil, Romania, Bangladesh, India, Equador and Estonia. This was a truly international gathering, crossing cultures, continents and time-lines. As one delegate remarked: 'I started this journey on Tuesday and I don't know what happened to Thursday.'

Acknowledging the variety of community foundations and community foundation support organisations in different countries, Monica emphasised that the focus of the day was on encouraging, developing and nurturing community foundations 'however we describe them'. To that end part of the day would be spent looking at what had been achieved by WINGS-CF and the organisations participating in it, and part in workshops drawing on and adding to the wealth of knowledge in the room.

Update and Discussion on WINGS and WINGS-CF Activities and Plans
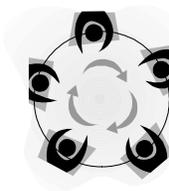
Monica Patten, WINGS-CF

Monica Patten began the session by taking a few moments to focus on the nature of the network. Organisations participating in WINGS-CF support the development and work of community foundations around the world. Some are established and some emerging; all are working in different contexts. What they have in common is an interest in and passion for community philanthropy as expressed through community foundations.

The WINGS-CF network has, since its beginnings, used the shared description of a community foundation in the footnote on page 4. But it was recognised that not all delegates would necessarily recognise themselves in that description. The definition of community foundations is part of an ongoing conversation. A flexible definition will work, it was suggested, if we keep in view a focus on mobilising resources at community level.

Reports and activities had been developed by and for WINGS-CF during 2000 and 2002 to benefit the diverse range of organisations in the network. One such program was the peer exchange, to be described in a session later in the day. A brief report on the activities of WINGS-CF during the past two years was circulated as a way of sharing our significant accomplishments as a network. Monica guided delegates through the report:

WINGS-CF progress and projects to date (May 2000 to spring 2002)

Governance:

- Terms of reference and operating procedures established for the WINGS-CF Advisory Committee, which is composed of a diverse range of organisations from this global network and

relates back to the WINGS Coordinating Committee

- Advisory Committee meetings held by conference call three times each year to review key issues and progress to date; informal contact as needed to stay on top of emerging issues or opportunities
- Terms of reference and working relationships established for WINGS-CF working groups, which guide individual projects and activities. The working group format was selected to echo the very global representation on the Advisory Committee, thereby ensuring excellent participation of the range of organisations and regions in WINGS-CF
- Working groups active with a range of projects, entirely via electronic communications
- Diverse and evolving range of organisations involved in all aspects of WINGS-CF work, through the Advisory Committee, working groups and direct participation in individual projects
- Framework for communications with WINGS-CF network established, maintained and reviewed

Projects:

- **Mapping of Funders Report** - a confidential report to the WINGS-CF network detailing funders of 12 organisations supporting community foundations around the world, during the period 1996 – 2000 (April 2001)
- **Compendium of Resource Materials for Community Foundations** – a searchable, on-line index of materials developed for community foundations by the organisations supporting them (July 2001)

We have so much in common… and I did not come expecting this.
— Bill King, Minnesota, US

- A series of eight **case studies** of organisations supporting community foundations, including an overview with key trends and findings (first published on the Web in December 2001; due to be published in print with WINGS case studies and a monograph in 2002)
- WINGS-CF **Web site** - designed as a sub-site of the main WINGS Web site. The WINGS-CF site houses contact information for the WINGS-CF network, background on WINGS-CF, the various products and services described here, and current information on activities in WINGS and WINGS-CF (December 2001)
- **Directory of Organisations Supporting Community Foundations** – an on-line searchable database which houses general contact information, as well as details for each organisation on its governance, staffing and finances, and the services it offers to community foundations (May 2002)
- **Peer exchange program** – a pilot program for peer exchange in the WINGS-CF network, the first visit between two organisations took place in January 2002. The approach used is being reviewed for implementation in 2002 and beyond with other network participants.
- Global report on **affiliates and other models used by community foundations for covering territory** (May 2002)

Management and finances:

- Diverse range of consultants recommended by WINGS-CF organisations used to apply their skills to the development of WINGS-CF projects.
- Positive feedback received from network and other participants on WINGS-CF "working style", communications routines, and overall effectiveness
- Annual budget established and met for WINGS-CF activities, as a part of larger WINGS budget
- Funds raised for aspects of WINGS-CF activities, in addition to main WINGS fundraising efforts

Leadership and positioning:

- WINGS-CF Advisory Committee approached by a funder to oversee and host a first-ever global meeting for community foundation and support organisation representatives on an issue of shared importance (planned for 2004, this is not a WINGS-CF event, although the Advisory Committee will offer leadership and planning energies)
- WINGS-CF, along with the larger WINGS initiative, increasingly mentioned and profiled in third sector media, helping to raise awareness of global community foundation development and the activities of support organisations
- WINGS-CF Secretariat increasingly turned to for source information on organisations supporting community foundations and international enquiries on community-based philanthropy

WINGS-CF activities for the remainder of 2002[3]

When the WINGS-CF network met in May 2000, participants agreed a number of priorities for the period 2000 to 2002. During the remainder of this year, attention will go into completing the projects agreed and to preparing for the Secretariat's rotation in 2003. Specific activities will include:

- A report from the WINGS-CF 2002 Peer Meeting will be prepared, posted on the Web site and disseminated [this report]
- The newest participants in the WINGS-CF network will be encouraged to add their information to WINGS-CF projects such as the Compendium and the Directory, and will be further incorporated into network activities
- The Compendium of Resource Materials for Community Foundations will continue to be expanded throughout 2002
- The Directory of Organisations Supporting Community Foundations, available on-line from spring 2002, will grow with additional and updated information from network participants
- The peer exchange program will continue, and additional matches between peer organisations will take place (up to four in total for the year). Electronic

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[3] As a result of discussions begun at this meeting, it has been agreed that during 2002 WINGS-CF will also undertake a minor project related to classifying and organising resource materials, and operate a translation fund for the benefit of WINGS-CF organisations.

methods for discussion and information sharing will also be explored as part of this program

- The case studies and the report on affiliate-like models will be more widely disseminated and promoted
- Work related to the management, governance and rotation of WINGS-CF will continue

Open discussion

In the open discussion following Monica's presentation, delegates noted the value of WINGS-CF as a means of two-way learning and support. Questions were raised about plans for evaluation of the network as a whole and its vision.

It was reported that in addition to the constant feedback for learning received by the network secretariat, WINGS-CF is being evaluated in the context of a wider evaluation of WINGS. There are plans for greater integration of WINGS-CF with WINGS, which until now, have for historical reasons, been two separate administrations. In order to strengthen the entire network WINGS and WINGS-CF will be brought together, with continuing high attention to community foundation development. Over the next eight months, WINGS-CF with WINGS will engage in a strategic planning initiative for 2003-2006. The role of WINGS-CF will continue to focus on nurturing organisations to support the rapidly developing community foundation movement. The co-habitation of WINGS and WINGS-CF will also foster work to develop a better dialogue between community foundations, traditional funders and associations of grantmakers, overcoming the tendency for community foundations to be seen as fundraisers.

Other issues raised in discussion included the challenge to demonstrate community foundations' roles in social and economic development to business, as well as governments. In the developing world, community foundations may be a means of putting responsibility back into communities, overcoming the legacy of colonialism and the expectation that government will do it all. Community foundations may also have a role in managing international donor relationships in ways that recognise local identity and control.

Globalisation poses new challenges for community foundations, as organisations based on the concept of communities with borders, to identify a theme of global importance and to grow without losing identity with local communities. But in attending to the 'big' issues, the importance of WINGS-CF as a place to 'support the supporters', sharing experience and day to day practice matters, should not be overlooked.

A point made earlier in the day about citizens taking an active role in countries with changing governments/ emerging democracies is relevant to all of us, and helped to set the tone for the meeting.

WINGS-CF Peer Exchange:

Pilot program and implications
for the full network program in 2002 and beyond

Facilitator: Diana Leat, consultant to WINGS-CF
Resource People: Marcos Kisil, Institute for the Development of Social
Investment (IDIS), Brazil; Monica Patten, Community Foundations of Canada.

This session focused on providing some early feedback on the first peer exchange, a mechanism for matching two organisations through a visit of seven to 10 days by one organisation to the other. The idea of exchanges came out of the last WINGS-CF meeting in Ottawa in 2000. Organisations at that meeting recognised that, whatever their other differences, by definition they share an interest in supporting community foundations. WINGS-CF is composed of constantly learning organisations and the peer exchange was seen as one way of putting mutual learning into practice – sharing problems and solutions rather than each discovering the wheel alone.

The first exchange took place in Ottawa, Canada in January 2002, between Community Foundations of Canada and the Institute for the Development of Social Investment (IDIS) of Brazil – in some respects very different organisations working in diverse environments.

Diana Leat introduced the session by thanking all those who participated in the production of the eight case studies of community foundation support organisations, and outlining the way in which they relate to the peer exchange programme. The range of differences between community foundations, their environments and the organisations supporting these foundations raise some important questions regarding the value of exchanges and in particular choice and matching of participants, and the amount of prior contact and briefing required before the exchange takes place:

- What criteria, in addition to prior trust and understanding, are important in matching organisations?
- How similar *and* how different should partnered organisations be?

- At what stage in the organisation's life cycle/development are peer exchanges likely to be most useful?

In each stage – start-up, capacity building, sustainability - community foundations and support organisations may have very different needs which may not be of immediate interest or concern to organisations at a different stage of development. Age and stage factors may be important in the choice of individual exchange participants. Other questions may arise for consideration, such as: Are senior staff likely to give and get more from an exchange than other staff members?

One of the key challenges emerging from the case studies was the need to build a strong and committed board. The importance of getting the Board familiar with and to support new ideas and approaches is well recognised, and it was suggested that Board exchanges might be something to explore in WINGS-CF.

This raises one of the most important issues concerning the exchanges – what

lasting organisational learning do they create? Organisational learning often gets lost in the pressure of day-to-day events, and the hugely powerful pressures of leaving things much as they are. Real commitment and understanding from the Board may be an important factor in avoiding loss of real organisational learning. Lasting organisational learning is one of the criteria against which the exchanges will be assessed over the next few months but other less tangible benefits will also be recognised.

Marcos Kisil, IDIS, spoke enthusiastically about the value of the IDIS-CFC exchange and presented his view of the key elements of a successful peer exchange. These included:

- Peer to peer respect
- The need for experienced people to participate in the program
- A common agenda and clear objectives
- A common project and a common vision
- Reciprocity – providing an enriching learning experience for both parties. 'If we'd just been receiving it wouldn't have felt half as good'.

(L-R) Rory Francisco Tolentino, Francis Maravilla, Norman Joseph Jiao, (Philippines), Lubica Macedo (Slovakia)

IDIS now hope that CFC staff will be able to visit IDIS and more fully understand the Brazilian environment.

Monica Patten, Community Foundations of Canada, emphasised the value of the exchange and agreed with Marcos' points about the elements associated with that success. Monica added some factors as host organisation:
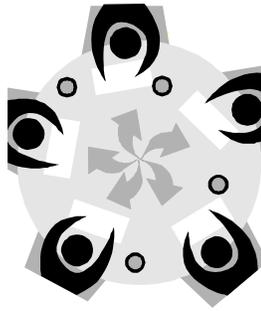
- The value of the evaluation process and questions in planning and preparation for the exchange
- The logistical demands on the host organisation, including 'just finding the time to do it'.
- The importance of drawing colleagues into the planning process, even though this takes time.

- The value of building the exchange programme on existing events and commitments.
- Taking the time to position the visit as worth doing in the eyes of the Board
- Building in time and space for reflection and relaxing.
- The value of the exchange in providing an alternative perspective and challenge to 'the way we've always done things'.

The comments and questioned raised by participants during the session illustrated the great support for the peer exchange format. This enthusiasm and the learnings from the pilot program will be applied to the development and delivery of further matches in 2002 and beyond.

I have no doubt that all communities in the world have community foundations in some sense.
— Noshir Dadrawala, India

Report Back from Workshops

Facilitator: Diana Leat

During the day, two sets of three workshops were run, each providing an opportunity for learning and exchange on topics of practical interest for the organisations taking part. Five key themes emerged from the brief reports on each of the workshops:

The importance of education about philanthropy and the roles of community foundations. This involves developing, accessing and disseminating facts, evidence and, importantly, vivid stories and examples about the value and achievements of community philanthropy.

The value of WINGS-CF as a means of sharing learning and supporting the supporters, via face to face peer exchanges and electronic and paper communication. Sharing learning raises difficult issues of matching for peer exchanges and designing systems to collect and access information. Sharing learning also involves distinguishing between 'nice to know' and 'need to know' information. This in turn raises important questions about the role of WINGS-CF, as distinct from that of other bodies including WINGS. One role for WINGS-CF may be to identify a basic library of materials relevant and necessary to all community foundations.

The need to recognise the diverse membership of WINGS-CF, the variety of cultural, economic, legal and historical environments in which they work and the different languages, models and meanings of community philanthropy they adopt. To aid understanding and real communication it may be useful for WINGS-CF to explore development of a glossary of terms used including differences in their meaning between countries.

The need to acknowledge the differences between participants' needs. Organisations at different ages and stages may face different issues and have very different needs.

The need to accept WINGS-CF's own age and stage of development. In its early stages it is important that WINGS-CF develops its own sense of community by focusing on the common needs and interests of its members. At a later stage, when the bonds of trust and confidence have been established, it may become as important to openly explore differences.

Key Learnings
for WINGS-CF participants and WINGS-CF activities

At the end of the day, participants were invited to join one of two rooms to discuss key learnings emerging from the meeting. Learnings focused largely on key points to inform WINGS-CF activities, from the perspective of newer and more experienced organisations in the network.

Experienced WINGS-CF participants
Facilitator: Luis Amorim,
WINGS-CF Advisory Committee member

Key points for WINGS-CF:
- Communicating to and *within* (e.g. board members) each organisation in WINGS-CF what a tremendous resource WINGS-CF and WINGS are.
- How to disseminate WINGS-CF information to community foundations?
- The WINGS-CF peer exchange program is excellent and should be developed further.
- Sharing best practice on fund development is wanted and needed.
- Research on how to promote philanthropy and its culture around the world is needed.
- Current WINGS-CF research on affiliates and other models for covering territory should include research into how to handle competition between two community foundations with the same/crossover territory.
- How WINGS-CF and its various participant organisations relate to global agencies such as the World Bank, European Union. How can we work together to explain the delicacy of community philanthropy and its processes?
- How to articulate the community foundation concept to funders of support organisations (government, etc.). What are the common features/themes/premises that we share which would help illustrate this, that also allow for incorporating differences in local culture/circumstances?
- How international grantmakers can help to mobilise national/private funders for the movement (using peer pressure).
- Articulating regional networking with global networking.
- Looking at the post technical assistance period (for community foundations) = independence/sustainability.

- The challenge of language (expand on current reflection).

Newer WINGS-CF participants
Facilitator: Gaynor Humphreys,
WINGS-CF Advisory Committee member

Key learnings identified by this group of new WINGS-CF participants included:
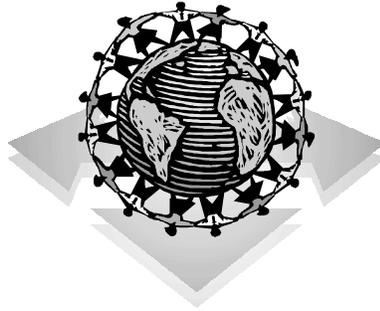
- The need to be aware of language barriers to the development and reach of WINGS-CF. If WINGS-CF's mission is to share experience across boundaries it needs to explore ways in which it can cater for non-English speakers.
- The need to avoid importing foreign models of community philanthropy into contexts in which they have little relevance. For example, the emphasis on endowment building can be very discour-

aging for countries beyond North America.
- The need for research documenting different models and contexts of community foundations, including models in rural areas in developing countries and methods of sustainability which do not depend on endowment building.
- Regional groupings and exchanges may be of value, enabling organisations working in similar cultural and economic contexts to share and develop experience. The value of peer exchanges within regions should be explored before entering into exchanges between very different, and geographically distant, countries.
- The need for flexibility and inclusiveness in WINGS-CF membership and activities. 'Instead of closing doors to organisations we need to look at ways of opening doors'.

David Winder, US, and Martine Foster, New Zealand

Support organisations have a role in educating government how to step away — how to give and to trust in local organisations.

— Gaynor Humphreys
United Kingdom

Conclusion

It is difficult to capture in words the day's sense of adventure, challenge and excitement. There was a feeling that having travelled to the New World, delegates were literally and metaphorically exploring new worlds – a challenging and exhausting but hugely satisfying journey. The journey was a rich, supportive and generous experience, exchanging common challenges and solutions, as well as beginning openly to explore differences. The discussion, in sessions and over lunch and coffee, provided a strong foundation for real openness and learning within WINGS-CF, developing the courage to move beyond the security of blue-prints, grappling with difficult issues and moving to acceptance and celebration of differences.

The destination

One of the day's recurring themes concerned community foundation *destinations*. Vision and mission are the foundation of policies and strategies for both fund raising and fund dispersal. Several workshops emphasised that community foundations are more than just a means of raising money, highlighting the importance of community foundations as means of community involvement, of democratising and growing philanthropy in the community. Citizens and communities have assets other than money and community foundations need to help identify and recognise these, encouraging people and organisations to see themselves as community resources rather than only donors.

WINGS-CF needs to embrace a variety of destinations. For example, the North American model of community foundations may have limited relevance in some places, including societies in transition and in rural areas.

Starting points

The diversity of starting points for the community foundation journey also needs to be recognised. A number of delegates made the distinction between cultures of giving and cultures of organised philanthropy – the former may be strong but the latter weak. Similarly, the concept of community may have different meanings and pose different challenges in societies characterised by racial, religious and linguistic divides. The challenge is to build on existing starting points and cultures rather than attempting to import foreign travel itineraries and destinations.

In many societies building an endowment is a desired, and sometimes distant, destination –an objective – rather than a starting point or condition. The distance to the destination should not be allowed to discourage people from undertaking the journey.

Community foundations not only start from different places in terms of history, culture, wealth and poverty and politics, they are also at different points on their journeys. Some are exploring the viability of building the plane, some are building the plane but don't know yet if it will fly, some have taken off and are beginning to climb, others have reached cruising height but still worry about sustaining that. Each of these stages poses different challenges and create different needs which need to be recognised within WINGS-CF.

Provisions for the journey
The community foundation journey can be long and is rarely, if ever, easy. The journey needs planning and provisions. The importance of education was emphasised again and again. Donors, potential donors, their advisors, the media, businesses, governments, other agencies and citizens all need to be educated about the concept, potential and practices of community foundations.

The importance and value of supportive travelling companions was also emphasised. The electronic and paper based information and support, as well as opportunities for face to face meetings, provided by WINGS-CF were seen as essential provisions for the often lonely and long community foundation journey.

Two specific tasks for WINGS-CF in supporting the promotion and sustainability of individual and collective community foundations' journeys were suggested. One was to explore development of a glossary of key terms and concepts to aid understanding and communication between fellow travellers. The other was to explore, recognising cultural and other differences, the creation of a set of core materials that every community foundation traveller should possess.

Another suggestion for WINGS-CF was to explore provision of opportunities for regional groupings and exchanges as an addition or alternative to global/inter-continental exchanges.

Sharing the journey
Monica Patten noted at the beginning of the day the worldwide wealth and diversity of experience and knowledge gathered together for the day. The plenary sessions and, in particular, the workshops amply demonstrated this wealth of experience as delegates shared both theory and practical tips in a real spirit of equality and generosity. We hope that this report captures the richness of discussion and sharing around both the 'big' and the day to day practice issues for the benefit of both those who attended and others in the network who were unable to.