



WINGS

**WORLDWIDE
INITIATIVES
FOR
GRANTMAKER
SUPPORT**

WINGS-CF face-to-face meeting 2004

Meeting held in Berlin, 2 December 2004

Report prepared by Christine Forrester

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Christine Forrester, author of this report and facilitator of the meeting, is an organisational development and evaluation consultant. She has been involved in evaluations of community foundations, including the evaluation of the Mott-funded support programme for community foundations in Slovakia (2002), and the evaluation of a community foundation endowment building programme in the UK. Christine has worked in Central and Eastern Europe, the former Soviet Union and in Palestine on civil society development programmes and on the establishment of grant-making programmes. She previously worked in senior management in the UK voluntary sector, notably in the HIV/AIDS field and in community development.

Worldwide Initiatives for Grantmaker Support (WINGS) is a network of over 100 associations of grantmakers and other grantmaker support organisations around the world which work together to strengthen the institutional infrastructure of philanthropy worldwide. By building a strong, interconnected and collaborative global network of grantmaker associations and support organisations they are helping grantmaking institutions that support civil society to build a more equitable and just global community.

Within WINGS, a primary constituent group is **WINGS-CF**, composed of over 60 organisations which promote the community foundation concept and support the development of community foundations.

Worldwide Initiatives for Grantmaker Support
c/o European Foundation Centre, Rue de la Concorde 51, B-1050 Brussels, Belgium
Tel: +32 2 512 8938, Fax: +32 2 512 3265, Email: wings@efc.be, Website: www.wingsweb.org

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1. INTRODUCTION

1.1 Background

Community foundations: Symposium on a global movement, held in Berlin from 2 to 4 December 2004, provided an opportunity for WINGS-CF also to bring together a wide range of individuals involved in organisations which support and develop community foundations to discuss issues of common interest.

The main aim of the meeting was to enable individuals with a support organisation role in community foundation development to exchange experience: as much time as possible was given to this. They were also invited to contribute ideas for WINGS-CF's future work programme. An important by-product of the meeting was the opportunity for individuals to get to know each other before joining the larger group at the Symposium. To assist this process, participants new to WINGS-CF were "twinned" with "older" members. The twins were encouraged to meet at the start over coffee, to have lunch together after the meeting and get to know each other better, and perhaps talk from time to time during the Symposium too.

Before the meeting, participants were provided with some key questions to prompt their thinking. Detail of the format of the meeting is given in Appendix 2 of this report. The workshop sessions, which formed a large part of the meeting, used "Open Space Technology", a means of holding fluid and responsive discussion. Anyone interested in learning more about this method of fostering discussion could look at the website www.openspaceworld.org.

In the course of the meeting there was also a presentation on WINGS-CF – history, achievements, current activity – and a request from Gaynor Humphreys (Director of the WINGS Secretariat) for pointers on the needs and issues that participants felt WINGS-CF could be addressing. Some are noted in this report, and others coming up less formally at the event were recorded by Gaynor and by Donnell Mersereau, Chair of WINGS-CF's Advisory Committee and her colleagues on the Committee, many of whom were at the meeting. A brief history of WINGS-CF, prepared for this meeting, has been posted on www.wingsweb.org.

1.2 Content and organisation of this report

This report focuses mainly on workshop discussions and has been written from detailed notes taken by workshop scribes. Where there was overlap in discussion topics, some points have been combined: this is not just a transcript of the workshop discussions. The report starts with a summary of the implications for WINGS-CF from the meeting, and an overview of the workshops. For anyone who wants to delve more deeply into how a topic was explored at the gathering, Section 4 gives details of discussion, drawn from notes taken by each group and the "post-it" thoughts provided by participants before the working groups started the discussions. The agenda for the meeting was as follows:

- 9.00 Coffee and "twinning"
- 9.30 Plenary session
 - Introduction to the event, format of the day
 - Introduction to WINGS-CF
 - Input session – community foundation development
- 10.30 "First thoughts" time: participants wrote ideas and questions about major topics on post-it slips and put these on flip charts
- 10.40 Workshops
- 12.30 Feedback/final session – plenary
- 13.15 Lunch

2. DEVELOPING THE AGENDA FOR WINGS-CF

It was clear from the workshops that the opportunity for sharing experience internationally, and face-to-face, is valued and more opportunities for these types of exchanges would be welcomed. In addition, the circulation of gathered material about specific issues (such as the development of standards) is needed. The idea of “twinning” each person new to the network with someone more familiar with WINGS-CF was received with enthusiasm and requested for future meetings.

The general issues which are highlighted in the next section and the specific issues which are collated in section 4 may provide some suggestions for the ways in which WINGS-CF can develop its agenda. Lack of time at the end of the meeting precluded a specific discussion on the ways WINGS-CF’s agenda could be developed (a self-confessed fault of the facilitator, who allowed the workshop discussions to continue, as the participants clearly enjoyed them!). One workshop asked WINGS-CF for documentation and ideas on standards from other countries and more opportunities to meet with other countries. There will be a WINGS peer learning event in May 2005 on this topic which will include a component related to community foundation standard-setting as well as looking at grantmaker standards more generally.

3. SUMMARY OF WORKSHOP DISCUSSIONS

There were five workshops on the following topics (Appendix 1 also gives the background questions they had as prompts):

- 1 Role and function of support organisations (1): the development of new community foundations
- 2 Role and function of support organisations (2): developing resources for more established community foundations
- 3 Standards and codes of ethics for community foundations, developed by support organisations
- 4 Sustainability of support organisations
- 5 Visibility and marketing of community foundations – the role of support organisations

There was significant synergy in the discussions in the workshops and the following section (3.1) aims to synthesise the key points. The first two workshops are described together.

3.1 Role and function of support organisations

WINGS-CF had provided participants with a list of possible roles and functions of support organisations drawn from an earlier survey (see Appendix 3). It was evident that every one of these functions was represented somewhere in the room. Some distinctions were made between the roles of support organisations in working with new foundations and with existing foundations, but on balance there was much in common in these two roles. There was discussion of the range of needs of new community foundations compared with the needs of established foundations and a recommendation for further work to identify the needs of community foundations at all their different stages of development, to ensure that support organisations develop their roles in response to perceived needs, rather than pursuing their own agendas.

3.1.1 Support organisations and the development of networks

This question of the role of support organisations was discussed in several contexts and was of particular concern where networks of community foundations have developed independently of support organisations. There are diverse types of support organisation in community foundation development, and the support available in a particular country partly depends on the stage of development of community foundations in that country. There can be tensions where community

foundations as a group start to develop networks and services independently of an existing support organisation, demanding different services or style of work, and expecting to play a lead role themselves. There was a lot of discussion on this issue, which is arising in several places. It demands of the support organisation careful consideration of change in its role and functions, including the possible withdrawal of its services to community foundations or a transfer of its functions to a new community foundation membership organisation. A key issue raised here is what happens if the community foundation membership organisation is not resourced sufficiently and is not able to deliver the services needed. How can these possible tensions and conflicts be resolved? Participants would welcome further sharing of experience, and information and guidance on this issue.

3.1.2 Regular review of the needs of community foundations

One participant asked whether community foundations themselves should have been involved in this meeting, as the questions being discussed did not necessarily reflect their views about the roles and functions of support organisations. This question may reflect tensions in a particular region. It does, however, raise the issue of how far support organisations regularly review the needs of the organisations with which they work.

3.1.3 Early stage development support

Where a support organisation does not exist in a country and there is interest in community foundation development, support for the development of the concept is needed (and it was suggested that this could be facilitated through WINGS-CF). At this early stage, feasibility assessments and initial funding support will be needed as well as technical assistance.

3.1.4 Communicating the role of community foundations

The challenge for community foundations in communicating their role to the wider NGO sector was raised in workshops 1 and 2 (this issue also relates closely to the discussion on marketing and on clarifying the community foundation concept). Support organisations have a key role to play in clarifying and communicating the concept more widely to support work on the local level.

3.1.5 Defining community foundations and the link to standards development

The discussion on communicating the role of community foundations raised the issue as to what the definition is of a “real” community foundation. Should all community foundations be required to build endowment? The consensus was that diversity is appropriate if it reflects local needs, traditions and cultures. However, there are some underlying characteristics and these need an agreed definition. This standards group (workshop 4) also touched on this and on the question whether support organisations should have a role both in defining what community foundations are and determining how they should develop.

3.2 Developing the standards agenda

Standards were seen as increasingly important to ensure that the community foundation “brand” is valued and that good practice standards guide fund development, donor relationships, investment and grantmaking. What role should support organisations play in standards development? Key questions which came up from these discussions included:

- Who defines the standards and how?
- Are there international standards and if so, how can they be adapted to the local level?
- How can adherence to standards be assessed and monitored?
- Who certifies the support organisation?

There was expressed need for more information sharing on the key areas to be included in any standards, as well as on useful processes for standards development. This is linked to the questions about how support organisations develop and change their role as foundations develop and where it may be appropriate for standards to be developed through networks of community foundations rather than through an “external” support organisation (ie one not structured as a network of community foundations or having the community foundations as members of an association). Any support organisations, however, were seen as having a key role in helping new foundations achieve agreed standards.

General issues that were noted on standards development included:

- Standards need to respect the stage of development and the culture, including the culture of giving, in any specific country.
- Encouragement is needed for community foundations to comply with standards once they are in place.
- Decisions are needed on what happens to those that do not comply. A risk was identified of rival organisations developing as a result of exclusion of organisations which do not comply.

WINGS-CF could support this work by collecting and circulating documentation and ideas on these issues and providing opportunities for international networking on specific issues, such as standards development.

3.3 Developing the sustainability of support organisations

The sustainability of support organisations relates closely to their roles and functions. There is a continuing need for support and advice for community foundations at all stages of development: this may come from a permanently established support organisation or a developed network of community foundations. One area discussed was for a support organisation to diversify into broader areas of philanthropy development. Fees for service were also discussed, with the recognition that community foundations might not be able to pay fees until they had reached an appropriate scale. It was also recognised that other sources of income were needed apart from membership fees – consultancy work or government funding were both identified.

3.3.1 Ensuring the capacity of support organisations

Support organisations must ensure that they have the capacity to provide the services that they promise and not raise unrealistic expectations. They must, however, be responsive to what their members want (and need to refresh their awareness regularly through surveys, etc) and certainly not just deliver what their donors may request. There can be a tension of priorities between the work required to keep them going and their response to members’ needs. Care is needed to avoid competitiveness with community foundations themselves if, for example, the support organisation aims to build its own endowment or supports community foundations in their fundraising but takes an administrative fee. Ideally much of a support organisation’s funding comes from charitable foundations which support the growth of philanthropy, perhaps in a specific region.

3.3.2 Developing the context for domestic philanthropy

To improve sustainability in general, the support organisation also needs to work on developing the context for domestic philanthropy. This is particularly important where international donor funding has started the field off but may not be available for long.

3.4 Support organisations' role in marketing – “telling the story”

The marketing group also discussed the community foundation concept to explore how to explain it. “Telling the story” was seen as very important in helping support organisations to be strong advocates for community foundations. Community foundations relay stories and the support organisation packages them for different target groups (including other, newer, community foundations). Good publicity about community foundation grantmaking was seen as the key to marketing. Support organisations can help identify target audiences, both local and national, and assist by targeting the national audiences and helping donors locate community foundations. Local and national work should proceed in parallel: national work reinforces what community foundations say about themselves. In some countries, dissemination of information about the international scene is also valuable.

3.4.1 Linking marketing to standards

Marketing needs a clear link with standards: the credibility of community foundations is partly based on standards. The support organisation can help define and clarify the community foundation concept for the country – helping develop a “brand” but leaving room for local diversity.

4. SPECIFIC POINTS FROM THE WORKSHOPS

4.1 Role and function of support organisations – in relation to the development of new community foundations and support for existing foundations

Two workshops covered the issues of role and function of support organisations, one looking at the support needed for new foundation development and the other exploring issues relating to support for more developed foundations. Support organisations play an important role in the development of new community foundations, whether at the start-up stage or during the early phases of development. They also play a variety of roles once a basis for foundation development has been achieved. There may be considerable differences between these two sets of roles. Since, however, there was much overlap in discussion, the points from these two workshops have been put together in this section.

4.1.1 Types of support organisations

A diversity of types

A diversity of types of support organisations was identified by both workshops:

- Membership based organisations, which mainly work with developed community foundations
- Other philanthropic membership organisations interested in supporting the community foundation concept
- Support organisations working with grassroots initiatives and developing community foundations
- Organisations that aim to strengthen the philanthropic environment and which may encourage a variety of different organisational forms, including community foundations
- Foundations or other institutions (nationally or internationally) that provide resources (eg Mott, Ford, Aspen)
- For-profit consultancies

Support organisations may already exist in a country or may be developing as community foundations develop.

Types will change

The type and the role of support organisations will change as the scale and maturity of community foundations change. For example, in Russia and Slovakia, as community foundations have grown in

size and numbers, there has been movement towards creating membership organisations though initial support was provided by independent NGOs “external” to the community foundation field. An individual support organisation can also change its style and structure to adapt to a changing community foundation field.

Where there is not a support organisation already in a country, support may be offered from elsewhere in the region. There was a suggestion that WINGS-CF could be more active in providing support where there is community foundation development in a country with no appropriate support organisation. Feasibility assessments, and initial funding may be needed, together with technical support to emerging community foundations (particularly on legal and fiscal issues, accounting, fundraising and other funding assistance), and financial support for grantmaking.

Need for mapping of support organisations

There is a need to look at who the support organisations are, where they are, and when and how they get involved in developing new community foundations.

4.1.2 Key needs of community foundations

Role relates to needs

The role of support organisations ought to be related to the needs expressed from community foundations from the earliest to most mature stages. The following table sets out the identified key needs:

New community foundations need	Established community foundations need
<ul style="list-style-type: none"> • Developing understanding of the concept • Technical support, particularly on legal and fiscal issues and general information • Commitment from the support organisation for future development • Process of development to be guided by inherent need • Ownership is with the community foundation, guided and assisted by the support organisation • Help with connection to other sectors and with dealing with “competition” issues with other NGOs • Fundraising and grant-making assistance • Funding for start-ups – <i>though this can be detrimental unless local fundraising also starts.</i> • Facilitation of formation of local steering committees • Achieving community buy-in to the concept • Assistance with the “message” about community foundations, particularly where other NGOs may feel there will be competition for funds • Guidance on how to co-operate with government but avoid dependency • Support for presenting the case to donors: advantages of a community foundation; learning about reasonable operating costs, keeping resources in the community, long-term vision for activities 	<ul style="list-style-type: none"> • Support and advice – <i>but too much support may be as bad as the lack of it</i> • Co-ordination with donors • Stop giving them money and start giving them advice and encouragement to look more widely for funds • Sharing of expertise and common interests • Consultancy advice and support - <i>the more CFs grow, the more support they need</i> • Help to sustain and increase the level and quality of services • To make mistakes and learn from them • Help with finding appropriate external consultancy support • Guidance on funding, endowment growth, operations • Information, resources, co-ordination • Training, professional development, facilitation of relationships

The need for funding from support organisations

Should support organisations fund start-ups? Seed funding is one way support organisations can assist development, as this is a key need for new community foundations. This should stop once the foundation is established and must always be balanced with advice and encouragement on local fund development.

Support to counter challenges of competition from other NGOs

Community foundations at early stages may well face challenges from NGOs which see them as competitors. There are messages which can defuse this tension, eg about preserving resources within the community for particular causes, creating new funds for local NGOs and grassroots initiatives, increasing the capacity of NGOs, mobilising and channelling resources. Start-up community foundations may need guidance on how to lead discussions with local NGOs on this.

Learning by doing

Community foundations are independent organisations and must do their own learning. If they are too closely supervised, they do not achieve this and keep coming back with every question.

Access to consultancy

Community foundations often seek out independent consultancy advice. Support organisations can help them find appropriate consultancy support, particularly access to consultants with experience of community foundations who are familiar with the relevant issues.

4.1.3 Role of support organisations

Defining the role

The workshops came up with a list of roles but noted that culture, donor base and social context need to be taken into consideration too:

Support organisation roles in work with new community foundations	Support organisation roles in work with existing community foundations
<ul style="list-style-type: none"> • Feasibility studies, data collection, mapping of philanthropic potential (eg philanthropy index of Southern Rural Development Initiative and Southeastern Council of Foundations in USA) • Guidance and capacity building for emerging NGOs about community foundation concept • Adaptation of community foundation concept to local circumstances and cultures and clarifying the concept • Specific support for start-ups – technical assistance and learning opportunities. Lots of support is needed early on in development. • Creating environment for community foundation development; awareness building of community foundation concept; branding of the concept • Building professionalism • Engaging business and government as partners • Advocating for better environment for community foundations; lobby for improvement in legal and fiscal environment for NGOs • Take advantage of existing global movement and support peer learning opportunities. 	<ul style="list-style-type: none"> • Data collection and mapping (eg Southern Rural Development Initiative; South Africa) • Pushing the agenda, being an intellectual hub • The most experienced community foundations may take on some consultancy roles so support organisations may focus on broader issues. • Established community foundations in many countries may still be volunteer driven, with limited resources: support organisation can help them step back, re-think, evaluate, assess how they are doing things; encouraging monitoring and evaluation • Basic: to be intermediaries, to give visibility, to perform monitoring and evaluation • Providing support and advice on a wide range of issues: <ul style="list-style-type: none"> ○ funding, endowment growth, operational support ○ information, resources, co-ordination ○ assessment, evaluation and monitoring ○ training and professional development ○ facilitating relationships

Support organisation roles in work with new community foundations	Support organisation roles in work with existing community foundations
<ul style="list-style-type: none"> • Direct grants for local practitioners • Supplying trained and experienced people to work with community foundations in development phase • Arranging study tours and exchange visits • Developing materials which “tell the story” and demonstrate that it can be done – success stories • Providing tools and advice for local champions so that they can learn quickly, engage a balanced combination of people and not reinvent the wheel • Board training, particularly in governance and strategic planning 	<ul style="list-style-type: none"> • Create synergies, encourage alliances • Additional: to support growth in rural areas, to help improve tax environment, to foster philanthropy development • Assisting with advice and help to find other and appropriate sources of advice and services, for example consultants • Establishing principles for community foundations • Consultancy, site visits, encouraging mutual exchanges between community foundations • Standards setting (but who sets the standards?) • Promoting the concept to potential investors; giving visibility to success stories; marketing; nationwide profile building • Encouraging working thematically (eg HIV/AIDS) • Identifying challenge grants for endowment/ operating costs • Developing networks of community foundations • Mentoring through difficult issues • Encouraging synergy across all philanthropic entities

Changing roles

The roles of support organisations need to evolve as their community foundation network evolves. Changes, such as new community foundations in rural areas, may change the role. As the sector develops, they may wish to take on new roles, such as being intermediaries for private funders to help develop strategic grantmaking, endowment building, etc. Additionally, they may wish to take the lead on developing the social justice agenda and encourage foundations to think more about this issue.

A key point was noted by CAF Russia, which currently sees its role as an investor, introducing new tools for giving to attract donors and promote individual giving. In future, CAF might withdraw from direct support of community foundations, leaving a community foundation network to fulfil the role of a support organisation, with CAF covering broader issues and general promotion of philanthropy.

This sort of change was discussed more generally: where a membership organisation of community foundations emerges separately from the initial support organisation, there are some key issues about the division of roles and functions:

- What should the division of roles and function be?
- Is there scope to transfer functions and share leadership in spite of the risk of conflicts?
- How can everyone involved in community foundation development (including outside consultants) be involved in discussions on these issues?

Encouraging start-ups

Both groups questioned whether support organisations should promote new community foundations in specific areas or encourage existing NGOs to become community foundations. Community Foundations of Canada responds to local communities and helps them to start a foundation when they are asked to do so. In Russia and Slovakia, community foundations were initially more or less created by an outside agent, based mainly on the example of US and Canadian foundations and promoted with financial assistance by foreign donors.

Defining what a community foundation is – and the support organisation role in this

There was a concern about supporting the development of “real” community foundations, including the question of whether they must build endowment. In both workshop groups it was agreed that having an endowment is not the key to being a community foundation. It was also noted that in many countries, current law is not favourable to endowment development. In many places (eg Russia) showing the value of the foundation through grantmaking was essential before endowment building could be attempted.

The role of support organisations in promoting standards and certifying community foundations was discussed but in addition there were questions about whether the standards themselves can be set by the support organisation or must be generated from the foundations themselves.

It was noted that it is very difficult to make a big change in defining community foundations once an idea has been accepted. Definitions and principles should be consistent and cannot be easily “turned” at a later date.

Older community foundations often tend to dictate to the young ones how they should work and what they are supposed to do; do support organisations try this as well, aiming to “shape” emerging initiatives? Discussion on this was broad ranging. It was noted that CAF Russia does not dictate, but still wants to make sure that the only organisations calling themselves community foundations are those which follow CAF Russia’s principles: raising local money and growing a donor base, and responding to local needs, working in and with the community, and providing money for the sector rather than running its own projects and services like other NGOs.

In Slovakia, the Ekopolis Foundation gives support but does not decide whether an organisation is or is not a community foundation; they prefer to see it on its own trajectory of development. In Mexico, community foundations deliver social services for the government but to be considered as community foundations they must also demonstrate their progress towards common principles. In the US, there are many hybrid organisations which can exist side by side with more “mainstream” community foundations if they can achieve agreed standards.

If the cultural context is all-important and different models of development are needed to fit specific local circumstances, this also requires the support organisation itself to be adaptable, to make space for and learn from different approaches.

Support organisations and dealing with specific issues

Russia faces a quite specific issue: one-company cities where that one company supports everything. CAF sees the community foundation as an exit strategy for the company - a tool to lever funding and share responsibility. YUKOS is a good example: at their main bases, YUKOS used to support social services. Then they started to support community foundations, re-routed money via these and started using their services. Although YUKOS is now being destroyed for political reasons, community foundations still fund services and provide for those in need. Care is needed to guard the foundations’ independence. Dependence on one donor can make sustainability questionable.

Rural community foundations are valuable everywhere, especially to tackle rural poverty and issues around large landowners. On the post-it notes a number of points were made about rural development, including the need for well-targeted technical support, and technical guidance on the types of gifts available from rural people (land, timber, livestock, farm equipment, etc). Studies of giving traditions of various racial and ethnic communities can provide ideas for engaging rural communities in building inclusive community funds.

Monitoring and evaluating

A number of the support organisations represented were asking questions about how to encourage the more established community foundations to monitor and evaluate their own work – another point to be followed up.

Support organisations have limited capacity – and need to think about their own sustainability

Support organisations try to provide as much help as they can but their capacity is limited too. They need to develop resources and priorities that will enable them to offer consistent and relevant services so that community foundations will primarily look to them rather than to other, maybe less well-informed or less appropriate, services.

Community Foundations of Canada (CFC) has been trying to sustain the level and quality of the services that it provides whilst avoiding charging for those services. Community foundations cover 79% of the country's population and CFC staff have to spread their time thinly to work with them all: membership dues are low but expenses are high. CFC is now thinking about introducing fees as a way to secure its own sustainability but is concerned that this may mean operating more as consultants do.

4.1.4 Should support organisations be proactive or reactive in their work?

Both initiating activities and responding to expressed needs can be important at different times and with different community foundations. There needs to be a balance between guidance and advice from the support organisation and the community foundation's autonomy and choice.

How much support? Developing principles

What support and how much to provide was a key issue for the groups which discussed:

- The need for definitions, roles and principles that will guide practice, and continuous advancement towards good practice
- The need for flexibility and adaptability within agreed principles, to recognise different approaches. Much depends on the support organisation's willingness to make space for different approaches
- Guidelines on funding given to community foundations - if provided, how it should be structured?

The reactive role

As start-ups must have community backing, support organisations agreed that they should always let local communities take the initiative and respond to them. They need to understand the context and the relationship between local need and development. In working with more developed foundations, support organisations (membership associations especially) must respond to member requests.

The proactive role

It was also identified by both working groups that there are times when support organisations need to initiate work. For example, they are in a good position to promote the concept to governments, businesses and NGOs and can bring all sectors together to find support for establishing a community foundation. A specific example was given from Egypt: while there is the tradition of endowment that has existed for over 1,400 years and it is well established in government structures, there is public mistrust and disillusionment with the concept of endowment. The legal environment is challenging and it is necessary not only to introduce new policies and rules, but also to clarify them for the wider public when it comes to the possible creation of community foundations in Egypt. Major donors are also needed to provide start-up funding for a new, community-based model of endowment. In this particular situation everybody agreed that the stimulus provided by a support organisation was vital before community foundations were likely to form and thrive.

Support organisations may also need to take the lead in agenda setting, such as, for instance, the promotion of social justice by community foundations.

Working with government

Support organisations can achieve a lot for community foundations if they co-operate with government (at all levels), so long as they maintain their independence. On the US-Mexico border, co-operation with government has helped to create new sources of income (though new legal and fiscal rules had to be introduced).

Developing diaspora giving

In particular circumstances diaspora giving brings significant resources, eg from Filipinos and Mexicans based in the US. In some examples the stimulus has come from support organisations.

4.1.5 Dealing with conflicts of interest

Potential conflicts of interest only came up in the group looking at working with established foundations and arose in relation to the tension there can be between direct services to members and the need for wider advocacy work, for example to lobby for legal or fiscal improvements. The group explored some of the issues in the classic servant-leader dichotomy. One post-it note also emphasised that support organisations should be client-orientated, not donor-orientated, implying that this is a source of conflict of interest too.

Potentially competing support organisations

CAF Russia is facing choices about its services now that an association of community foundations has formed. Some of the roles of CAF Russia could be fulfilled by the new association: should they choose to cut back most services to community foundations at this stage and just focus on making grants to them and providing consultancy? Can they transfer some functions to the new association? What happens if it is not able to perform these functions?

Conflicts of interest in donors' forums

In several places, broader associations of grantmakers have been reluctant to include community foundations in their membership. This can especially occur where they are seen as small foundations which will be big consumers of association services and as grantseekers which may try to fundraise from fellow-members at association events. The Russia Donors' Forum was cited as concerned about the latter point although it is now admitting community foundations into membership.

4.2 Standards and codes of ethics for community foundations, developed by support organisations

The working group identified five key questions in relation to developing of standards and codes:

- Who decides?
- Why bother?
- How do we get there?
- What does it take?
- Does it really make a difference?

4.2.1 Importance of standards and codes of ethics

Standards are increasingly seen as important (and support organisations as critical in developing them) to ensure that the community foundation brand is valued and that community foundations are operating to good practice standards in fund development, donor relationships, investment and grantmaking.

4.2.2 Key issues in standards development

A range of issues which were identified on the “post it” notes started the discussions in this working group:

- Who defines the standards and how?
- How much do you involve the public in defining the code of ethics for a public community foundation?
- Are there international standards? How can they be adapted to the national level?
- Should standards be different depending on the complexity of the community foundation sector in any country?
- How can adherence to standards be effectively assessed and monitored?
- Accreditation? Avoidance of policing.
- Purpose?
- Who certifies the support organisation – self-certification?
- Human ethics and professional behaviour standards
- Standards help shape the model in public - clear profile
- Brand building; transparency
- Accountability and transparency
- How standards help you raise profile and credibility
- Community foundations should provide leadership in being ethical and transparent
- TRUST - how to build it among the public to get support for foundations
- How to make standards work for you, not drown you.
- Standards are useful; training of boards in setting, monitoring and adhering to codes of ethics and standards is more critical
- Support organisations strengthen network activities by collecting feedback; work with authorities; collect international expertise; help elaborate and endorse definitions

4.2.3 Current situation and issues in a range of countries

The discussion enabled the sharing of current experience across a range of countries that were represented in the working group:

Country	Have standards?	Legal status	Key issues
Poland	YES – but new more restrictive ones being developed	No legal definition of community foundations but there are definitions of associations and foundations	<ul style="list-style-type: none"> • Who monitors the standards and what can be done if the standards are not met? • Issues of how to encourage co-operation
Latvia	NO	Community foundations registered as associations – a new law requires registration.	<ul style="list-style-type: none"> • How to restrict the definition • Who can use the term community foundation? • Currently have a general by-law that can form a model for the rest • Should community foundations with small endowments be required to adopt standards? • Endowment is a new issue and is not defined by law

Country	Have standards?	Legal status	Key issues
Canada	YES		<ul style="list-style-type: none"> • Lot of emphasis on standards and training programmes to guide boards and staff • Annual survey to ensure community foundations have appropriate standards • Intensive process to formulate principles, which define who can become a member and members must sign up to principles. Have defined what each principle means; have looked at how principles can be converted into practice. • CFC work with all groups wishing to become community foundations, to ensure adherence
Australia			<ul style="list-style-type: none"> • Not the same emphasis on endowment building
New Zealand			<ul style="list-style-type: none"> • Code of ethics for grantmakers through Philanthropy New Zealand but no extension to include standards for fundraising and donor relationships. • Code of ethics and standards are to be reviewed
Germany		No legal definition of a foundation Requirement by state to have a minimum endowment, otherwise the organisation is an association (minimum requirement 100,000 euro, then 50,000 a year)	<ul style="list-style-type: none"> • Developing a set of standards • Characteristics/criteria and independence (ie the majority of the board are not appointed by particular parties) are contentious issues. Papers developed defining each of ten criteria. Some which do not fit criteria are arguing against the standards • Currently have self and peer assessment model • Have branded the standards, and media have picked up the idea and publicised it, but incentives needed to encourage their adoption.
United States	YES		<ul style="list-style-type: none"> • Split off of support organisations. Eg in Michigan standards are now in a separate structure to overcome some of the problems • Process in place for ensuring compliance – document-based process which took five years to develop • Independence defined both by who is involved and by the appointment/ nomination process
Kenya			<ul style="list-style-type: none"> • The grantmakers association in East Africa is key • Members must comply with code of ethics. • There are organisations that do not meet traditional definitions of a foundation, but give grants. • Working on common issues like tax, governance, grantmaking and endowment

4.2.4 Issues for further discussion

From these discussions, a range of key general issues were identified:

- There are different laws and cultures around giving throughout the world. We need to respect the stage of development, country culture, culture of giving.
- If standards are set early then it is easier and fewer compromises are required.
- Compliance can be distracting at the set up stage for new community foundations. When is the right moment?
- How does one encourage a community foundation to comply with standards? Standards adherence could be the criterion for access to marketing, etc.
- What do we do if community foundations do not comply? If they are excluded from networks and support, how are they then monitored? There is a need to keep in unofficial contact with those who do not comply and are therefore not members. Avoid having rival organisations set up that will confuse the public and lawmakers. This issue also raises a conflict around membership fees, influence, etc.
- Who should define standards? Should it be the support organisations?
- What constitutes independence? It is important that a community foundation complies with the essence of independence and is not captured by either external organisations or culture.
- What can WINGS-CF do to support this work? Eg make available documentation or ideas between countries and regions and create opportunities for international meetings.

4.3 Sustainability of support organisations

Support organisations often have difficulty in persuading funders of the value that they add to the work of community foundations. How can they ensure their own sustainability?

4.3.1 What does sustainability mean?

Is sustainability a dream of reality or plain survival? The group identified a number of issues which are important in considering this:

- While it depends on the members, the ability to provide effective, efficient, timely services is key.
- Support organisations need to ensure that they have the capacity to provide the services they promise. Expectations may not match resources.
- The value perceived by the members/clients gives you the insurance needed to bring about sustainability.
- Being realistic about the cost of providing a service.
- There was a felt need that support organisations must resist the occasional temptation to deliver what their (external) donors want and really focus on what the members/network want. This is tough as it is recognised that support work is not all that appealing!
- Other sources of funding apart from membership fees are needed – for instance government funding or consulting work.

Issues that were raised on the post-it notes included:

- Are support organisations still thinking that creating a business is contrary to their goals? Do fees for services make any sense? Membership fees should be the last option.
- Can volunteers run support organisations effectively?
- The tensions in setting priorities – the need to keep the support organisation going set against the need to work with members.
- How can a membership system be created which allows for good engagement with a diverse range of members?

- Sustainability is easiest if it is the programme of a fully funded operating foundation which supports the growth of philanthropy or regional development or both.
- A support organisation should be an existing prominent organisation that is sustainable through providing philanthropic services nationally.
- The demand for help from community foundations exceeds the capacity of support organisations.
- Support organisations versus self-help networking

4.3.2 Developing strategies for sustainability

Financial

- Endowment building – or at least a long-term savings strategy – is key for this kind of work. But for some this raises a question of competition with constituents. While competition may be an issue, in the end a balance must be struck between long-term fundraising and shorter-term strategies.
- Fees-for-service are deemed more appropriate for some services (because this demonstrates the value of the support organisation's role) but not all community foundations can pay these in initial stages. It depends on local context and culture as to whether this is viable.
- Support organisations could charge realistic fees for certain events.
- The support organisation could help community foundations fundraise and take some sort of administrative fee. This may not help build local community foundation sustainability, however.
- Membership fees may work in some contexts but are less reliable in developing countries.
- The organisation should focus on promoting domestic philanthropy – a successful example was given from the Czech Republic, and the Ukraine is now following this strategy also. This may provide stronger support for services in the long run. Therefore, as one of its roles, a support organisation should work to change the local and international environment of development funding.
- Valuable to have community foundations as advocates for the support organisation and maybe even doing some joint fundraising for it.

Programmatic

- Lifespan issues were raised. Does an exit strategy make sense? Many felt permanence for support organisations is desirable but not a given. In South Africa, the Industrial Development Corporation is putting a three-year cap on the time in which it plans to provide funding support. They feel having an exit strategy makes sense for their role to avoid creating any dependency in the community foundations.
- The group was in agreement that part of ensuring sustainability is the continuous (often small-scale or gradual) reinvention and refocusing of the support organisation reflecting the changing course of community foundation development.
- The Russian case was used to discuss how community foundation support work might need to diversify somewhat. For example, CAF Russia does not charge membership fees but it does charge fees for administering family philanthropy through donor-advised funds (beyond those interested in contributing to a community foundation).

Technological

- Can technology help save costs by bringing the work of several support organisations and their constituents together?

4.3.3 Summary of key points on achieving sustainability

- Build stronger domestic philanthropy to create donors aware of infrastructure needs.
- Stay focused on your constituents and not on donor needs only because constituents are the best bet for determining your long-term value.
- Diversify products and services beyond community foundations to earn fees that help finance the work specific to community foundations.
- Help community foundations – your constituents – develop strong business plans and therefore become sustainable.
- Be aware that there may be a link and a tension between the sustainability of support organisations and community foundations themselves.

4.4 Visibility and marketing of community foundations: role of support organisations

Individual community foundations market themselves in their local areas, but there is a role for support organisations in marketing the “brand” more widely and improving visibility. The group discussed these points:

- Why? What drives us? What are we marketing? Are we profile raising? Customers?
- What can support organisations do to help members locally, regionally, nationally?
- What can we do? Where do we want to go?

4.4.1 How can the community foundation concept be explained?

The group began by looking at this for community foundations at early stages and set out to identify the audiences to be reached. In Australia, they emphasise self-help which has a positive image that fits with the culture. Philanthropy is not understood as a term there, though “charitable organisations” and “giving” are.

It is important to explain the community foundation concept using powerful messages (the power of stories) to convey “the vision of the community”. The community itself must be able to identify and highlight the benefits of community foundations, and defines what matters locally. Products and strategies are important. Good stories can demonstrate the professionalism and credibility of community foundations, especially important in talking to professional advisers. But there is also a need to show the softer edge, for example local grant recipients talking about what their grant meant to them. Support organisations must be strong advocates both for community foundations and for community participation.

4.4.2 Who are the target audiences?

Address different target groups/stakeholders: financial institutions, companies, individual and family donors, communities themselves, community groups, NGOs, government, other foundations, dormant trusts, politicians (for tax laws and endorsement) and researchers. Community foundations tell good stories: support organisations collect and package them for specific target groups. There is a story for everyone.

It was suggested by Mexico where companies are setting up foundations but may not know how to do grantmaking well, that it would be better to encourage companies to give through community foundations where they would have less risk, more visibility, less cost and more professional administration.

4.4.3 Linking visibility and marketing to standards

There is also a need for a clear link with standards, as credibility is linked to standards. The support organisation serves as facilitator to help define the concept for the country. Communications strategies and professionalism are needed (nationally and locally) to deliver a professional message.

4.4.4 Should support organisations run campaigns and what would they cost?

In the USA support organisations have run campaigns and developed promotional material. For example, there has been a specific campaign developed by the Ford Foundation, the Aspen Institute and eight community foundations. They had good material and especially nice quotes and stories. There should be material to share in mid-2005 that will be particularly relevant to rural communities. Australia has had a lot of help and advice from the USA. Local campaigns encourage people to give; national ones raise awareness and help donors locate community foundations.

Where local and national work run in parallel, national publicity reinforces what community foundations are saying about themselves. Local foundations should be encouraged to show draft material to the support organisation, to check accuracy (over technical detail like tax breaks) but also to share good material, approaches, and phrases. WINGS-CF could also share material between countries, but each individually needs to keep up to date on areas like tax issues. There is good value in getting local community foundations to agree on key messages together, and then adapt and use them locally. In some countries it could be useful to describe the international scene as well as the in-country position.

On the costs of campaigning, asking donors (especially businesses and business people) to help with expertise and funding can be a way of covering costs. Community foundations should help to finance joint campaigns. It is possible to use students and local designers – pro bono contributions to keep costs low.

4.4.5 Grantmaking as the key to marketing

Telling good grants stories can be the best way of getting attention for community foundations so in a way their grants budgets do service as their marketing budgets. It therefore makes sense for the support organisation to help newer community foundations find seed money for grantmaking and thus directly assist visibility and marketing.

4.4.6 Drawing some conclusions

It is vital to get the marketing messages right in order to:

- Grow funding and philanthropy
- Achieve clarity and credibility for community foundations
- Articulate the benefits of community foundations
- Stop others using the brand – preserve the branding for “real” community foundations

Messages:

- Need to relay good stories of benefits, outcomes, results
- Vehicle, value added, knowledge of the community
- Hard-nosed (market segmentation): standards, statistics, technical (eg tax), efficiency of grantmaking
- Soft-nosed (for all): stories

Role of support organisations:

- Signposting
- Mount campaigns
- Develop sample material
- Set standards
- Clarify the model
- Advocacy
- Collect interesting experience

Role of community foundations:

- Provide stories
- Call to action
- Face to face, make it real
- Local media
- Take marketing tools from the support organisation and adapt them for local use
- Be professional; deliver on the promise

Issues:

- Can't just do it in one campaign – it needs continual refreshment and new stories to attract attention
- Agree “the brand” – but allow local diversity

APPENDIX 1: WORKSHOP TOPICS AND KEY QUESTIONS

Role and function of support organisations I:

What is the role of support organisations in relation to the development of new community foundations – at start-up and early stages?

- What is the main role of support organisations in relation to the development of new foundations?
- What kinds of programme activities should support organisations develop to fulfil their role?
- What are the main kinds of funding that community foundations need in their early stages of development?
- Should support organisations develop specific links with funders to provide funds for new community foundations, or should they assist new foundations to identify sources of funds to help with early stages of development?
- Should advocacy with policy makers, either for support or for inclusion in mainstream programmes of community foundations be one of the main responsibilities of a support organisation?
- Should support organisations seek out opportunities for new community foundation development or should they react to initiatives which come from local communities? Given a clean slate, how would one begin to develop community foundations in one's communities?
- Are rural community foundations worth developing and should the strategy be different?
- What are the key resources (other than funds) that support organisations need to develop to assist with the early stages of community foundation development?
- How can resources from international sources be adapted/interpreted to ensure that they are appropriate for use?

Role and function of support organisations II:

What is the role of support organisations in relation to developing resources for more established community foundations?

Support organisations can play a variety of roles once a basis for foundation development has been achieved. Their role in relation to "mature" community foundations may be very different from that needed by newer foundations.

- As community foundations develop, what is the main role of support organisations to deepen the work of foundations?
- Are there funding sources which support organisations should try to secure from funders to assist in widening and deepening foundation development?
- How can support organisations help community foundations achieve endowment growth?
- What are the key resources (non-financial) that support organisations can develop to help community foundations grow beyond their initial stages?
- What are the support needs of more mature foundations which support organisations can assist with?
- What is the role of networks of foundations in relation to support organisations?
- How do support organisations respond to requests from networks?
- Should support organisations become membership organisations? If they are membership organisations, what services should support organisations offer?

Sustainability of support organisations

Support organisations (secondary bodies) often have difficulties in persuading funders of the value they add to the work of community foundations (primary bodies).

- What do we mean by sustainability of support organisations?
- How do support organisations demonstrate that they are adding value to the work of community foundations?
- Is membership an option in developing unrestricted funding for support organisation work? Should support organisations seek project funding from funders for specific work on issues related to the development of

foundations? Can support organisations (unlike community foundations) realistically expect public support (contributions from the public) for their work or will they always be grant dependent?

- How do support organisations ensure their long-term survival?
- Is there a critical mass of development of community foundations in a country which can help a support organisation to survive?
- How do support organisations change in response to the changing environment as foundations develop and move towards their own sustainability and maturity?
- How do organisations which support networks of community foundations respond to and prioritise the demands and wishes of these networks?
- What are the risks for future community foundation development within a country if the national support organisation fails to achieve sustainability?
- Is there specific work that support organisations should undertake to ensure their sustainability?

Standards and codes of ethics for community foundations, developed by support organisations

Standards and codes of ethics are increasingly important to ensure that the community foundation brand is valued and that community foundations are operating to best practice standards in relation to fund development, donor relationships, investment and grantmaking. Support organisations may have a critical role in the development of standards and codes of ethics.

- What is the key driver for the development of standards?
- How can support organisations best develop standards?
- How can community foundations themselves be involved in the standards and codes of ethics process?
- What are the main areas of standards which need to be developed?
- What are the key issues which need to be covered by codes of ethics?
- At what stage should standards and codes of ethics be developed by support organisations, in relation to foundation development within a country?
- Are there standards which should be seen as universal in relation to the community foundation brand? Will standards need to be culture/context specific?
- Are there basic ethical codes which should be seen as universal in relation to community foundations?
- Should standards and codes of ethics be mandatory on community foundations which wish to join a network?
- How can standards and codes of ethics be used with funders and with donors?

Visibility and marketing of community foundations – the role of support organisations

Whilst individual community foundations will market themselves in their local areas, there may be a role for support organisations in marketing and improving the visibility of the brand more widely.

- What is the key driver for the marketing of community foundations by support organisations?
- Is there a link between standards and national level marketing of community foundations by support organisations?
- Should support organisations have a role in the wider marketing and visibility of the community foundation brand?
- What kind of role could support organisations play in marketing?
- Is there a tension between national and local level marketing?
- What kind of marketing at a national level is likely to be useful and successful?
- Are there some key messages that only support organisations can deliver in relation to wider marketing of the community foundation brand?
- Should support organisations develop an advocacy programme to market community foundations and their issues to policy makers? If so, how should this be done?
- Are there particular target audiences for marketing and profile raising of the community foundation brand by support organisations?
- How can resources be found to undertake marketing and profile raising of the community foundation brand by support organisations?

APPENDIX 2: FORMAT AND PROCESS FOR THE MEETING

The workshop will be kept as informal as possible. There is a risk that it will feel a little chaotic at times, but this is OK, provided there are a couple of floating people making sure that everything is running OK.

ARRIVAL

Badges with participants' names plus slip of paper with their "twin" name on it and some simple instructions. Participants will be urged to find their twin, introduce themselves, get a cup of coffee and get to know each other. We could also encourage pairs to find another pair to go and introduce themselves to over coffee. That way, groups of four will have done introductions to each other. Also encourage the groups of four to find chairs together. All participants to be given some post-its, to write down their "First Thoughts".

THE ROOM

Room layout to be in semi-circles. Depending on layout of room, I would suggest that the circles contain 8 chairs. This means that 2 groups of 4 could find chairs together.

Need five tables at the sides of the room, with either flip chart stands or flip charts on the tables. Lots of pens!

"FIRST THOUGHTS" TIME

The Instructions for "First Thoughts" need to be given at the start of the plenary (also on the 'Welcome to the Workshop' form). Immediately after the plenary, Participants will be asked to go round the room and put up their "First Thoughts" post-its. Give about ten minutes for this. This will also give time for the moderators and scribes to arrange themselves for the working groups. Some people may still be wandering after ten minutes, but the moderators should start their groups no later than that.

WORKING GROUPS

It would be preferable if there are no chairs grouped round the tables, though the scribe will need a chair. If people want to bring up a chair, fine, otherwise let people stand, lean, perch, whatever! If we announce after about 40 minutes that coffee is available to be taken into the groups, this also provides a natural break for people to change groups (some may wander between several). At this point, moderators will run through key points they have flipcharted to let new participants come up to date with the discussions so far. Also refreshes the minds of those who stay in a group. At end of time, if possible, agreement of working group of no more than ten key points (priorities) from the discussions. Then moderators will quickly write up the ten key points from the working group flip charts (if necessary).

FEEDBACK

Key point flipcharts to be put up on the walls. Participants have ten minutes to wander round, looking at the flip charts. Moderators will then have up to three minutes to do quick feedback, explanations of points, overview etc. It could also be useful at this stage to have the moderators join the "platform" for the general discussion session, when the participants can raise further points and questions. We need to ensure that any other points/questions are noted at this stage. Then summing up by facilitator.

TIMEKEEPING

Timekeeping will be essential at three key points – in the introductory plenaries, as it is important that the working groups start on time; the break point for the working groups; in the final session, as the whole workshop must end on time.

APPENDIX 3: THE ROLES OF SUPPORT ORGANISATIONS

Some mapping work by WINGS-CF a couple of years ago identified the range of activities covered by support organisations. While few organisations cover the complete list below, a high proportion of WINGS-CF network participants cover many of these functions for their members or constituencies.

- annual or biennial major conference (some CF only, some for a broader range of grantmakers)
- some run other types of major conferences (e.g. summer fundraising school)
- technical assistance and training
- seminars, workshops, retreats: for community foundation CEOs, administrators, board members, grants staff, financial staff
- on-site assistance
- one-to-one consultation (mostly by telephone)
- telephone/email/fax “hot line” for information
- fax-on-demand, conference calls
- listservs, website, sample documents
- publications/resource materials created specifically about community foundations; · newsletter, annual report, bulletins
- other: presentations; meetings with financial advisers: study tours
- general communications
- information services and technology
- library/resource centre
- directories
- other activities: info alerts; case studies; legal evaluations and opinions on tax issues etc
- monitoring and advocacy on legal and tax issues
- input to charity taxation legislation
- input to other legal issues
- legal/tax assistance to members
- promotion of philanthropy
- specific programmes, eg specialised marketing, diaspora programmes; employee giving programmes; rural philanthropy expansion, etc.
- promotional activities to professional advisers, government, companies
- intermediary/facilitator role: two types:
 - facilitating or managing collaborative funding programmes among community foundations
 - serving as intermediary for distributing funds from national funders (private foundations, government, corporations)
- providing funding to community foundations
- challenge grants (for operations, re-granting, endowment)
- small grants (for operating costs, peer consulting, board development, etc)
- scholarships/subsidies (for travel/ fees for annual conferences, seminars)
- internships for staff and board members
- networking
- internal: listserv, training events, peer learning, specific networks
- external: broker to outside networks like WINGS, Transatlantic Community Foundation Network (TCFN), local networks of NGOs, government, etc
- research
- supporting the growth of community foundations internationally

APPENDIX 4: PARTICIPANTS

Name	Organisation	Country
Carrolle Perry Devonish	Anguilla Community Foundation	Anguilla
Catherine Janet Brown	Catherine Brown & Associates - FRRR	Australia
Andrew John Lawson	Philanthropy Australia	Australia
Jana Kunická	European Foundation Centre	Belgium
Deborah Goldemberg	Institute for the Development of Social Investment (IDIS)	Brazil
Monika Pisankaneva	Counterpart International - Bulgaria	Bulgaria
Ruth Jones	Community Foundations of Canada	Canada
Betsy Martin	Community Foundations of Canada	Canada
Barbara Oates	Community Foundations of Canada	Canada
Liqing Zhao	Beijing Eludao Consulting for Sustainable Development	China
Jiří Bárta	VIA Foundation	Czech Republic
Boris Cornejo	Fundación Esquel - Ecuador	Ecuador
Marwa El-Daly	Philanthropy for Social Development, Centre for Devt Services	Egypt
Bernadette Hellmann	Aktive Bürgerschaft	Germany
Nikolaus Turner	CF Affinity Group, Bundesverband Deutscher Stiftungen	Germany
Pushpa Sundar	Sampradaan Indian Centre for Philanthropy	India
Gulmira Muratovna Izimbergenova	Central Asia Regional Ecological Center	Kazakhstan
Janet Mawiyoo	Kenya Community Development Foundation	Kenya
Monica Mutuku	Kenya Community Development Foundation	Kenya
Inese Danga	Centre for Non-Governmental Organizations	Latvia
Agustin Landa	Lotería Nacional	Mexico
Vivian Blair	Vivian Blair & Asociados	Mexico
Judith Rae Timpany	Whanganui Community Foundation	New Zealand
Norman Joseph (Oman) Jiao	Association of Foundations	Philippines
Iwona Olkowicz	Academy for the Development of Philanthropy in Poland	Poland
Olga Alekseeva	Charities Aid Foundation Russia	Russia
Vadim Samorodov	Charities Aid Foundation Russia	Russia
Boris Strecanský	Ekopolis Foundation	Slovak Republic
Katarina Minarova	Association of Slovak Community Foundations	Slovak Republic
Fikile Brenda Kuhlase	Industrial Development Corporation of South Africa	South Africa
Christine Delpont	Southern African Community Foundation Association (SACOFA)	South Africa
Chris Mkhize	Southern African Community Foundation Association (SACOFA)	South Africa
Max Legodi	Southern African Grantmakers' Association (SAGA)	South Africa
Benjamas Siripatra	Local Development Institute	Thailand
Clare Brooks	Community Foundation Network	UK
Svitlana Anatoliivna Kuts	Center for Philanthropy	Ukraine
Natalya Sofyants	Ukraine Citizen Action Network	Ukraine
Katharine Pearson Criss	Center for Rural Strategies	USA
Dalene Bradford	Community Foundations of America	USA
Donnell Mersereau	Council of Michigan Foundations	USA
Marcy Kelley	Inter American Foundation	USA
David Dodson	MDC Inc.	USA
Alan McGregor	Southern Rural Development Initiative	USA
Natasha Louise Amott	Synergos Institute	USA
Janet Marie Topolsky	The Aspen Institute	USA
Juraj Mesik	World Bank	USA
Christine Forrester	Facilitator	
Gina Estipona	WINGS-CF	
Gaynor Humphreys	WINGS-CF	