

Reflections on Philanthropic Effectiveness

The following article, while written by Jed Emerson, is based upon the comments, thoughts and ideas of over 35 foundation representatives brought together in Heidelberg, Germany, by the Bertelsmann Foundation as part of the International Network on Strategic Philanthropy. The INSP Work Group would like to thank Fatiah Buerkner for her assistance in summarizing our discussion.

The reader should be aware that this narrative was built off the rough transcript and notes of the session. That discussion included comments from most of the participants in the Working Group as well as specific statements and language presented by these participants, but taken from other source documents. Where possible, we have attempted to cite all sources, however it should be noted that some of the following text might draw upon sources lacking adequate citation. We apologize for this in advance and encourage the reader to seek out cited documents as well as other materials available on the topic of philanthropic effectiveness.

This article is offered not as a comprehensive review of issues related to philanthropic effectiveness, but rather as a reflection of how some of those involved in philanthropy approach a question that is viewed with increasing importance, namely:

*How should we best pursue efforts to maximize
the effectiveness of philanthropy?*

Ineffective Philanthropy?

To understand the significant role philanthropy can play in society, all one need do is look around a community, city or nation. There are arts institutions, community groups, educational initiatives, environmental policy organizations and countless other entities that owe all or part of their existence to philanthropic support. In the United States, philanthropy has played a critical role in providing resources to help connect individual vision with the ability to take an idea and build an organization capable of bringing that vision into reality. It is obvious to all who would look that foundations and philanthropy have played important roles in improving our overall quality of life and efforts at beginning to remove barriers that hinder the fulfillment of our true potential.

Having acknowledged that fact, many of those engaged in philanthropy are growing increasingly uncomfortable with the emerging answer to what is seemingly a very easy question: *Are we being truly effective in the pursuit of our work?* While one would like to respond with a resounding “YES!” it is also clear that many (both within philanthropy and outside its walls) are less quick to affirm the quality and effectiveness of foundations.

Increasing numbers of individuals are questioning the role philanthropy plays and whether it is achieving its true potential. In the words of one grantee, “Foundations are like the building ledge on which non-profit pigeons sit—not the wind under their wings that makes them fly, but a helpful something, nevertheless.” Or, as one foundation president recently commented, “Foundations are like the cadaver at a family wake—their presence is essential, but not very much is expected of them.”

And yet, we *are* needed aren't we? What would nonprofits do in our absence?

While we would all like to think we are important and significant players in helping nonprofits make our world a better place, it is perhaps not surprising to find that nonprofits themselves are less impressed with the caliber of our work. Several years ago a number of foundations active in Northern California commissioned a market survey (involving interviews with grantees, government officials and other players) to assess how foundations are viewed and what beneficial roles they are thought to play. The response to this survey was striking on at least two counts.

First, there was a complete absence of any positive assessment of the work of foundations. Across the board all those involved in these survey discussions failed to say a single positive word about the quality of the work or contribution made by the foundation community. The reader should pause for a moment and think about that statement. There are over 56,000 foundations active in the United States and a growing number of foundations in nations around the world. The majority of foundations operate without staff and simply provide direct financial support to nonprofit organizations. Yet, *the feedback from this survey was that the contributed value of these philanthropic players is at best neutral.* Certainly, this should give all of us involved in philanthropy reason to step back to think about the real value of our work.

Second, and perhaps most interestingly, were the phrases most often used to describe foundation staff and trustees. Again, we would imagine them to be words such as efficient, helpful, supportive or high value-added. But those foundations that underwrote this survey were sincerely surprised to find the terms used to describe both them and their colleagues were: arrogant, heuristic, full of hubris, self-confident to the point of overpowering and having a complete inability to listen. Again, it would be good to take a minute to think about this feedback. Foundation representatives are used to being fawned over and told just how critical their support is to the work of nonprofits. Despite this sense of valuable self-worth, there is the very real possibility that many of those we seek to support actually view us through a much different lens and experience our efforts at contributing to their work as little more than a necessary evil to be tolerated.

When taken together, these two observations may be more than we care to accept. We may be tempted to say this could possibly be true of other foundation executives and staff, but certainly our own grantees would respond differently. And while we would all like to believe our work is of only the highest value, in point of fact the actual perceptions of those who should know—our customers, if you will—could well be completely opposite from our own.

We must consider the possibility that we have met the charitable enemy and that enemy is us.

Despite a great deal of rhetoric and several emerging efforts to address this question of effective philanthropy, there has been little demonstrated commitment on the part of the foundation community to assess the effectiveness of its own activities, whether as investors in the common good or as organizations pursuing social and other goals with charitable funds. At a recent meeting of Grantmakers for Effective Organizations it was interesting to note that virtually all the workshops addressed the effectiveness of nonprofits receiving foundation support—*not* the effectiveness of the foundations providing those grants.

On an individual basis, the emphasis does not change. One foundation president commented that having spoken to his colleagues regarding this issue, he has received little, if any, response. In his words, “I ask them if they would like to work together to explore philanthropic effectiveness and either they don’t understand the problem or feel they *are* being effective and it’s the ‘other guys’ who need to work on it!”

There are clearly a number of reasons this may be the general response, however an important one is the fact that most foundations view their role as one of charitable institutions whose primary function is to provide financial support (mainly through the awarding of grants) to nonprofit organizations. And that is it. As long as the grants go out the door and are supporting “good” nonprofits then their philanthropic purpose has been fulfilled. This orientation toward “transactive” philanthropy (with its focus on the exchange of grant dollars for social good and not necessarily upon the long-term value generated by those philanthropic dollars) has a number of implications.

With our focus on grant making, much of the field’s activities come to be “front-loaded,” with greater emphasis on the making of grants as opposed to the value generated by such grant making. At foundation conferences one sees many training sessions on such topics as how to manage grant making, how to find “innovative” new programs and, in general terms, how to direct the process of philanthropy itself—but few workshops seek to assist foundation staff in developing better frameworks to understand the long-term effectiveness of foundation funding. Within this context, it should come as little surprise that it seems like it is only in last decade or so that foundations have begun paying real attention to issues such as evaluation and performance tracking of nonprofits—and even more recently to the challenge of evaluating foundations themselves.

Another implication of a transactive approach to philanthropy is that it leads to short-term strategies that provide little incentive for long-term investments in the creation of Social Management Information Systems capable of tracking multi-year social impact and program performance. In the absence of such systems, there is no data generated (either quantitative or qualitative) with which to track long-term outcomes and assess effectiveness of grantees or, by extension, the grant maker.

Furthermore, with a focus on grant making, there is no need to assess the overall financial structure of the grantee organization or offer alternative approaches to meeting the capital requirements of the nonprofit. The role of the foundation is to either approve or deny the grant. It is not to explore how foundation assets could be more effectively leveraged in support of not simply the individual nonprofit, but the sector as a whole since, again, the emphasis is upon how foundation assets may be used to make grants—not invest in the field or advance the larger social mission of the institution.

Toward a Process of Increasing Effectiveness: Implications for Practice

If we are to move beyond charity and toward greater effectiveness within philanthropy, we must first acknowledge that there is both the need and opportunity for improvement. As is true of many illnesses, the first step to recovery is to admit you have a problem! Having made such an acknowledgement, one must then make a meaningful commitment to the pursuit of philanthropic effectiveness. *This commitment cannot simply be voiced through a memo out of the president's office, but must be a commitment that grows out of the deliberations of the board of directors and the labors of program staff.*¹ The whole of the philanthropic institution must decide to engage in the pursuit of greater effectiveness and be open to the changes such a commitment will no doubt entail.

A central aspect to this process of moving toward effectiveness is the “re-visioning” of the role of the foundation from that of “charitable grant-giver” to “investment partner in social well-being.” Foundations need to begin to understand their role as participants in public problem solving entails the need to change the way we function, both internally and with those outside our organizations. If we are to move from an output to an outcome orientation we will need to act in a number of new ways:²

First, we must *connect with a variety of stakeholders* in the development of our long-term investment strategies. What this means is that we must seek to become consumers of ideas and experience from other players and other sectors. By truly (and not simply in a perfunctory manner!) engaging in dialogue with these players, our own strategies will be more realistically grounded in what is happening in the market as opposed to what we perceive to be happening in the market. This will then give us a greater likelihood of being effective in our own work.

Second, by connecting with a variety of stakeholders we allow ourselves to draw upon knowledge that can help us establish better goals that direct us toward more effective philanthropic performance over time. Our connecting with the field in a more direct manner will facilitate a “*flattening*” of the hierarchies in knowledge sharing and in that way promises to enhance not only our own understanding of the challenges at hand, but

¹ In the text that follows, italics are used to signify specific points raised in presentations or by participants.

² The majority of the following points are adapted from the work of the Marco Polo Project, being managed by the Millenium Group. The original, specific points were presented by Dennis Collins (Irvine Foundation). These individual points were then added to and expanded upon by the session participants. What follows are those session comments as further developed by this paper's author.

also provide opportunities for others to participate in building this shared knowledge-base.

Third, if we are to be successful at executing the first two steps, we must truly *value our "customer's" satisfaction*. Foundations operate in a closed market with little competition. If a prospective grantee doesn't like how we operate or what we fund their only option is to not apply for the grant. Instead many nonprofits contort themselves to accommodate the stated funding interests of the foundation and then simply work to assure the foundation continues to believe it's contributions are valuable while the nonprofit pursues its own work in whatever way it sees fit. This action/reaction leads to a "dance of deceit" that undermines the ability of either player to become truly effective in its work. Foundations need to place the feedback and perspective of our grantees at the center of our work. This does not mean we take all feedback at face value or do not "push back" when there is a difference of opinion, however it does mean there is mutuality of respect in creating adequate opportunities for this discussion to take place.

What this will entail is our fourth step, namely the *altering of the terms of engagement between grantee and grantor*. As many good program officers clearly understand, grantees function as the source of a foundation's knowledge. The only way that knowledge will be directly infused into the grant making strategies of the foundation is through the creation of a funding relationship that is of a long enough duration for the players to develop a meaningful level of trust and open enough for the foundation to be able to process the information offered. This represents a significant shift in the nature of the connection between grantee and grantor from one of "what do you want to hear" to one of "I'm willing to listen to what you are trying to tell me..."

Such an approach reflects our understanding that philanthropic effectiveness also means a *commitment to knowledge development and dissemination*. This is a critical issue for foundations in that the majority of foundations do not even issue annual reports much less engage in strategic cultivation of learnings and knowledge. Effectiveness requires the ability to reflect upon actions and improve upon performance. To paraphrase Tom Peters, a commitment to effectiveness requires an ability to "fail forward" in order to continually improve upon the quality of one's performance. In turn, this requires a foundation's having the ability to receive, and being open to receiving, input from others regarding the quality of its activities.

Effectiveness within a philanthropic context also requires the foundation have knowledge regarding the quality of its *capital performance*. A traditional investment fund would track its return on investment; philanthropic investors must be capable of tracking social returns at a number of levels of activity. This entails more than simple evaluation of its grantees, but would also include efforts to engage in both quantitative and qualitative assessment of foundation performance, as well as the performance of the foundation's financial assets, in such a way that future performance may be improved.

A commitment to future effectiveness requires the foundation *establish a performance baseline* against which it will then measure future performance. This can be explored through a variety of approaches. For example, the Knight Foundation engaged in an extensive inquiry regarding the state of “health” within areas of its grant making in order to understand whether or not the conditions had changed as a result of the work of the Foundation and its funded partners. The Rochester Effectiveness Partnership (New York) made use of a community process to create commonly embraced evaluation criteria against which it could benchmark future performance. And, through the OASIS Project that received support from a variety of foundations, the Roberts Enterprise Development Fund helped build an information infrastructure to track performance of both its own capital and the work of investees.

Even in the absence of such initiatives, one important way in which the effective foundation seeks to manage this process of information development and benchmarking is through *fostering intra-foundation dialogue*. Too many foundations mimic the “silo” structure of many governmental funding departments and do not create enough opportunities to bring together the varied program areas to discuss the shared work in which they are engaged in order to better understand the uniqueness of each area’s program focus. It is only through common deliberation and debate that the true boundaries of one program area may be understood relative to another. More importantly, it is through such explorations that the foundation as a whole becomes better positioned to understand how its application of resources and execution of strategy might lead to the greatest levels of total philanthropic effectiveness.

In addition to working across foundation categories and program areas, foundation leadership must also step back from “how we do business” to understand “how we *could do* business”—and what *total assets the foundation has to apply in that strategy*. The pursuit of philanthropic effectiveness is grounded upon a comprehensive appreciation of all the assets the foundation has at its disposal. Indeed, foundations have the capacity to risk more, make longer-term investments and see things fail in order to build knowledge and organizations. Foundation leadership must recognize they are part of a larger capital market with different sets of investors making use of a variety of investment goals and instruments. Some foundations are capable of making long-term bets on research and development and others are more comfortable supporting “proven” programs. An important element of effectiveness is to be as clear as possible with regard to what type of investor one’s foundation is and to then structure the foundation’s capital accordingly.

A helpful approach in reflecting upon foundation asset management is that of a *Unified Investment Strategy*³ capable of guiding the application of those assets in pursuit of the foundation’s social mission. In brief, a UIS states that a foundation’s value rests not simply in its grant making activities, but in how it maximizes the effective application of all its assets in pursuit of its social mission. These assets include the foundation’s

³ For an in-depth discussion of both the concept of Total Foundation Asset Management and a Unified Investment Strategy, please see the paper entitled, “*A Capital Idea*,” which may be found on the Publications Page of the William and Flora Hewlett Foundation, www.hewlett.org.

philanthropic capital, as well as its market-rate capital, concessionary rate capital and human capital.⁴

Our tenth consideration is that out of this “cross-disciplinary” discussion among foundation program officers and staff will emerge a deeper understanding of how best to track the performance of a foundation’s blended portfolio that includes these social, human, cultural and economic capital resources. *Effective use of resources is not simply a function of the utilitarian application of grant making resources, but rather is the outcome of positioning multiple forms of capital and resources in pursuit of the larger mission of the organization.*

Finally, this drive toward the pursuit of philanthropic effectiveness must be grounded in a fundamental commitment to the *cultivation and enhancement of mutual accountability* between all players in the nonprofit sector. In light of the power and other dynamics that may skew communications between foundations and those seeking their support, it is especially important for foundations to be “transparent investors in public benefit.” This means clearly communicating one’s decision making process and priorities to those seeking support as well as sharing knowledge the foundation develops as the result of engaging in failed efforts to pursue its goals.

This commitment to accountability must be founded upon the awareness that *isolated and inflexible organizations will become increasingly less able to create value in a networked world.* If foundations are to truly be effective, they must seek to become transparent investors in the social market place. Anything less than that will assure a simple continuation of the dysfunctional relationships and practices that presently fester below the thin veneer of current philanthropic activities.

Barriers To Effectiveness and The Dangers of Attempting to Overcome Them

The previous pages present the discussion of our session participants regarding the need for and components of philanthropic effectiveness. These comments are in some ways self-evident, yet the field as a whole has not moved to embrace or act upon them. Our discussion then moved toward the question of what barriers are present that inhibit the foundation community’s embracing strategies to achieve greater effectiveness? We identified a number of factors:

A lack of vision. It was felt that in many countries with developing philanthropic communities there is a lack of real vision with regard to what foundations are or can be and therefore the pursuit of effectiveness with regard to that mission becomes muddled. It was also observed that many foundations in the United States appear to lack a real sense of vision regarding their work. Many foundations are felt to be vague about their intentions, confuse effective philanthropy with simple acts of charity or often overstate their aspirations when their actual ability to effect change may be quite limited.

⁴Among other factors, examples of a foundation’s human capital assets may be a foundation’s “knowledge base,” convening ability and potential for engaging in partnerships with its grantees and investees.

A lack of modesty. Many foundation trustees and staff project the image that they actually know what they are doing when, in point of fact, many foundation people know precious less than they care to admit. There are a number of reasons this situation has evolved (the insular nature of the community, the power dynamics of foundations relative to other players in the sector, and so forth), but the fact is that many foundation players overstate their knowledge regarding the “right thing” as well as their capacity to “do it.”

A conflict between the requirements of effectiveness and those of fundraising. An important barrier to philanthropic effectiveness is the reality that true effectiveness necessitates a long-term orientation to organizational capacity building, intellectual inquiry and program innovation. Yet the majority of the players in the nonprofit sector must pursue annual financial support—often to the detriment of both program development and effective management. Therefore, it is almost natural that conflicts evolve between the creation and management of effective programs and requirements of fund raising to support the organization.

A lack of market feedback. Effectiveness requires at least some ability to receive feedback regarding performance, yet the vast majority of foundations (perhaps all...) do not make any regular, concerted or structured effort to gather, analyze or disseminate feedback regarding the performance of the foundation from those with whom they work. The construction of systems capable of generating such feedback on a regular and timely basis is complex and performance benchmarks difficult to create. However, without such frameworks in place, foundations will continue to lack a self-corrective process and incentive structure to improve the caliber of their own work.

A fear that a move to effectiveness will kill the “soul” of foundations. One barrier to moving toward greater effectiveness within philanthropy is the fear on the part of some that doing so will make for a sterile grant making environment. There is the fear that the ability of foundations to function as testing grounds of new ideas will be stunted by an emphasis on documentation, accountability and process. The notion is that such a move will make foundations less open to experimentation.

A lack of advocacy. Despite the rhetoric, the pursuit of philanthropic effectiveness lacks advocates within the foundation community. While some may talk about it, there are not many foundation trustees willing to hold their presidents truly accountable for the pursuit of effectiveness or support the resources necessary to achieve it. Furthermore, foundation leadership is notoriously conservative with regard to any effort to change the traditional practices of philanthropy. Whether it is the pursuit of a Unified Investment Strategy or the creation of new metrics by which the success of foundation staff will be assessed, the leadership of most foundations is hesitant to advocate for systems and strategies that are still in development. This acts as a major barrier to innovation within philanthropy and limits the evolution of more effective practices.

The reality of complex measurement systems. The fact of the matter is that developing accurate frameworks, metrics and systems by which to track foundation effectiveness is indeed a complex endeavor. To track foundation effectiveness potentially requires assessing not only the operations of foundations, but also the organizations they fund and “constituencies” of those same organizations—whether client groups or eco-systems. This does present a very real challenge that must be addressed and many feel it is quite simply easier not to do so, but rather to make grants and assume some level of good will come of it.

The myth of resource limitations. As soon as one begins discussing the need for greater efforts at increasing the effectiveness of foundation work, objections are raised with regard to the fear that re-directing resources toward efforts at increasing effectiveness will decrease the overall amount of funds available to support the work of nonprofit organizations themselves. While it would be wrong to suggest there are not any resource implications entailed in increasing the effectiveness of philanthropic practice, it must also be understood that through investing such resources the overall return and efficiency of all resources allocated in pursuit of the foundation’s mission will ultimately be increased. The “myth” is disproved by the truth that by investing in improving the effectiveness of foundations philanthropic institutions will be able to achieve greater, more sustained impact through those funds that are made available to grantees.

Cultural and Organizational Inertia. Finally, one significant barrier to improving the effectiveness of foundations is the very real cultural and organizational inertia that inhibits forward movement on this issue. Papers such as this and the voices increasingly being raised in the foundation community offer a clarion call to continual improvement. Yet many in the foundation world will not readily agree there is either a need or necessity for change. Foundations are used to being told how important their work is (ie. How much their funding is appreciated...) and are not used to being challenged with regard to whether or not current practice can be significantly improved upon. Those who would improve philanthropic effectiveness (whether at the board, senior staff or program levels) must first overcome the commonly endorsed perspective that while all things may benefit from improvement, philanthropy is on the whole a healthy practice not requiring significant critique or analysis. To solve any problem one must first recognize that there is a problem and in this case there is not common consensus on that point.

As with many things in life, the opportunities presented by pursuing increased effectiveness within philanthropy have within them potential dangers of which we should also be aware. While the sense of our group’s discussion was that such threats are not great enough to warrant inaction, it is important to be cognizant of areas that may entail a potential downside to the possible upside of championing effectiveness within the foundation community.

Effectiveness would seem to be an obviously “good thing” to pursue, however we should be clear that the devil may well be in the details of our execution. Some foundations are well positioned to shift and adapt strategies as the reality of experience informs that of theory, but other foundations may find institutional or other processes create bureaucratic

hand-cuffs that inhibit creativity when it comes to transforming ideas to practice. There is, then, the potential danger that *foundations attempting to become more effective may in fact find themselves committed to a course of action that prevents them from taking advantage of strategic opportunities* that may present themselves in the future.

The perceived “barrier” that foundations may “lose their soul” as they pursue the goal of effective philanthropy may be an additional danger we must guard against. Foundation funding represents an extremely small portion of the dollars available to support the work of the nonprofit sector, yet it is possible those funds are also in many cases the most flexible and innovative. Locking those dollars into specific strategies with measurable results risks falling victim to the danger of over-focusing upon the mechanics of performance management to the detriment of vision and passion that drives much of philanthropy. In light of the lemming-like nature of foundation grant making interest, there is the very real danger that foundation executives may, in their rush to remain in a perceived position of being “ahead of the curve,” lose out on maintaining the diversity of thought and practice that leads to true innovation and change.

Finally, there is the concern that we may allow the inappropriate application of for-profit frameworks within the nonprofit sector. There are at present many consultants and critics of the field who enter the arena of philanthropy with a background in business. Some of these advocates of effectiveness are, quite naturally, relying upon their “business frameworks” to inform their approach to effectiveness within philanthropy. Given many foundations’ interest in “getting the answer and applying the solution,” there is a very real danger of our simply lifting the metrics of business and applying them within the civil sector without adequately modifying or developing those frameworks.

The challenge and opportunity presented by the current conversation regarding effectiveness is the chance to create new, evolved and tailored ways of tracking performance and assessing the value of philanthropic dollars. There will no doubt be those who simply want to do what is most expedient and that may be to rely upon the supposed knowledge of “experts.” The reality is that at this point in time there are no experts with regard to philanthropic effectiveness, only fellow travelers. We should welcome all, but allow the field to pursue the path most appropriate to its own interests, experience and vision.

Concluding Thoughts:

In exploring the challenge of achieving greater effectiveness within philanthropy, our discussion addressed issues of strategy, policy and practice. Yet woven throughout that discussion was a common thread of concern—concern that in our efforts to improve the quality of our work we not lose sight of the fact that our work is not simply “ours.” The foundation community is created as part of a public trust. The funds provided come as a result of tax considerations as well as charitable intent. Foundations function outside of the arena of government and business due at least in part to the belief that the interests pursued by foundations are interests that may benefit the larger “commons” of which we are all a part. If we engage in our pursuit of effectiveness in a manner that largely

excludes the many stakeholders with very real interests in the outcome of our work, we will have saved a tree and lost the forest. In the words of one foundation executive,

“Where are the people in all these conversations? They are nowhere. The question is that if we are going to change the people in a sustainable way, we have to listen and respect them. Those same people have to participate in the design of the program that is supposed to help, but I really think that foundations do not believe in that. We all think that we know best and have the answers. If we’re not able to change this attitude in our own individual, personal mind-set—if we do not bring in the people who have their lives at stake in the decisions we make—we are in danger of losing sight of everything we seek to achieve.”

There is great promise in attempting to improve the work of foundation executives and the institutions they manage. However, if we forget to keep our eye on the prize there is the very real chance we may instead develop greater effectiveness at doing not what is right, but what only we think is right. To allow this to happen would be to miss out on being truly effective in our efforts to achieve the social mission at the heart of our efforts.

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3. Diane Leat, *Professor, City University Business School London*
4. Richard Fries, *Chairman of the Board, International Centre for Not-for-Profit Law*
5. Dirk Eilinghoff, *Program Officer, Bertelsmann Foundation*
6. Dieter Berg, *CEO, Robert Bosch Foundation*
7. Dominique Lemaistre, *Director, Direction du Mécénat, Fondation de France*
8. John Palmer-Smith, *Adviser, Paul Getty Trust*
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10. Jed Emerson, *Senior Fellow, William & Flora Hewlett Foundation*
11. Rui Esgaio, *Office of the President, Calouste Gulbenkian Foundation*
12. Tom Backer, *President, Human Interaction Research Institute*
13. Ed Pauly, *Director, Evaluation, Wallace-Reader's Digest Funds*
14. Christian Felber, *CEO, Christoph Merian Foundation*
15. Tobias Henkel, *Director International Programs, Association of German Foundations*
16. Barry Knight, *Secretary, Centris*
17. Jorge Villalobos, *Executive Director, Centro Mexicana para la Filantropia*
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19. Jacek Wojnarowski, *Managing Director, Trust for Civil Society in Central & Eastern Europe*
20. Rui Vallera, *Program Officer, Fundacao Luso-Americana*
21. Christine Castille, *Director, Evens Foundation*
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