

# **Observations and lessons learned from the 1st year of implementation of the Spanish field development program**

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## **Introduction**

I would like to start this essay by acknowledging the benefits and opportunities that the ECFI Learning Lab has offered me, by creating and facilitating this learning space, to build my capacities and knowledge as a practitioner, in a field that is fairly new in many European and non-European countries.

When, in February 2021, I was hired by the Association of Spanish Foundations (AEF), my experience in the third sector was especially strong in managing programs, monitoring and evaluation, fundraising and institutional relations issues, but not so much in Community Foundations (CF) per se. When I started coordinating the program, the purpose of which is supporting the creation of CFs in Spain, I had to come up to speed with many different aspects of CF as a model and a vehicle to change and improve our societies. It has been like approaching a whole new world for me.

The working load and the virtually infinite needs of the program that have to be satisfied, don't always leave a good space and time to read and acquire very needed and useful insights on the topic, for interviewing deeply different stakeholders, most of which are the participants of the program itself. I was determined I wanted to dedicate the time of the Lab, in doing a piece that

would be beneficial and meaningful for the work that I am doing at the moment. Being at the end of the first year of the program, I naturally gravitated towards collecting my observations, and to organise this information in a way, that can be complemented with the observations and lessons that I will extract from the second year, in August 2022. I hope it will be useful to other Community Foundation Support Organisations (CFSOs), in countries where CFs are emerging.

This Laboratory created this space for me, and it translated in increasing my knowledge of my own constituencies, while strengthening my relationship with them, and increasing a mutual understanding of our roles, needs, values and aspirations. So in short, I am very grateful to this Lab for helping me to be more confident in my role of supporting newly formed groups, with the aim of creating CFs, in a country where people barely know of the existence of this concept.

The program is still in its testing phase, experimenting with different strategies. For the past 10 months, I have been witnessing, participating and learning about how to engage with people to make them visualise what creating a CF means, without having too many examples around me, to be able to visualise it myself.

We know that envisioning, and more so, seeing a living example of something, tells our brain that it is possible and replicable. A sort of “If they did it, we can do it”. This is why, when trying to disseminate the concept of what a CF is, in countries like Spain, showing examples of other CFs here and abroad seems to be a must.

In Spain, there are 7 CFs that were identified by the researchers of the Bertelsmann Foundation (BF) in 1991, and were given a recognition and a certificate of ‘Civic Foundation’, which is by international standards the same as a Community Foundation<sup>1</sup>. The analysis that the BF did, concluded that almost all CFs in Spain were very weak in grantmaking, but very good at community engagement, so as part of this research, I also decided to analyze what the existing CFs are doing here in Spain 20 years later - the role that these foundations enact, the techniques and strategies adopted by Spanish CFs to engage with the community, basically the secrets of their success and for lasting up until now, bearing in mind that it is highly context-based and that what works in one place, may not necessarily work in other places. This information is useful in order to guide newly formed groups in embodying the same or a similar vision.

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<sup>1</sup> According to the Global Fund for Community Foundations: «Community Foundations are grantmaking foundations that: 1. Seek to improve the quality of life for all people in a defined geographic area. 2. Are independent from control or influence by other organisations, governments or donors; 3. Are governed by a board reflecting the communities they serve. 4. Make grants to other non-profit groups to address a wide variety of (and changing) needs and opportunities in the community. 5. Continuously mobilise local contributions from a broad spectrum of predominantly local donors (individuals, businesses, local government, diasporas, etc.). 6. Seek to build or ensure a permanent resource for and from the community, e.g. endowed funds from a wide range of donors or from other services and activities. 7. Provide services to local donors to help them achieve their philanthropic goals. 8. Engage in a broad range of community leadership and partnership activities, serving as catalysts, conveners, collaborators and facilitators to solve problems and develop solutions to community issues. 9. Have open and transparent policies and practices concerning all aspects of their operations. 10. Are accountable to the community by informing the general public about their purposes, activities, and financial status on a regular basis.»

**What helping creating a CF looks like in Spain from the perspective of a CFSO: We know that, the first steps are the most important in order to get it right, so let's take a closer look at those steps in this short paper.**

The following are the overarching questions that guided the analysis. The idea is not to answer these questions comprehensively, given that the analysis that follows only presents preliminary observations that will need to be revised and complemented, at the end of the second year:

- What do we have to look for in a Founder Group (FG), in order to understand if they are in a good position to create successfully and sustainably a Community Foundation, in order to select them for the program?
- What kind of characteristics should the FG try to build up in its initial stages?
- How do we guide the FG, in trying to offer what the community actually needs?
- What seem to be the most effective strategies to engage with the community in its early stages?
- How do we guide FG effectively in order for them not to lose momentum and get to the goal of creating a CF?

With these questions in mind, and after 10 months of the program, my observations bring me to think that a CFSO should help the FG achieve certain starting conditions but also keep in mind that every group varies, and there is no such thing as a general rule or a standard that any group should fit in. These are just observations that are still in the making. These are notes to keep in mind while moving forward, this is not a manual with fixed recipes. The more personalised the help, the better!

## **Observations**

- A. Establish if there is a strong intrinsic motivation guided by the right values within the FG, important is also having a good leadership that the community recognises as trustworthy, that serves as an example and leads the way as a catalyst.**

Alexandra Stef, who helped many FG in Romania constitute into a CF, stressed the importance of a CFSO becoming good at understanding if the group has the right kind of intrinsic motivation. Answering questions like:

- Are their intentions strong enough to maintain momentum over time?

- Is the intrinsic motivation of the group the correct one?
- Is the group aligned around the same motivations?

She experienced this was key in understanding if a group reunited the necessary starting conditions to be successful and to last over time.

Building a strong case, not losing sight of the motives for which we are creating a CF while raising the funds. Sometimes it takes several meetings adjusting the presentation, before people understand what we are trying to do. Group dynamics come into play, and people have to become good at managing egos within the community, adjusting communication and messages depending on the public, being resilient, maintaining the focus and the intention even when people try to discourage you (because they do!).

Having someone that leads the way, that functions as a catalyst is crucial. When a person or a group of people that are well respected, that have a good reputation and have a recognised position within the community, start the process of wanting to build a CF, people will follow. The example goes a long way. People will feel compelled to get involved also and collaborate. The reputation and the position of the initial group within the community, will be a determining factor in order to attract and engage people from different sectors. The catalyst is normally well connected with different sectors within the community (public, private, the community in general) and has access to people with influence, decision-making powers or with assets.

One example that we have in Spain is *Fundació Novessendes* (Betxi, Valencia), a 20 year old CF, that the AEF team visited to learn about their story. What struck us the most, was the strong motivation of its founders to maintain certain values, and the clear intention of passing these principles down to new generations. The case of Novessendes is important because it demonstrates that with a strong will and motivation, it's possible to change a foundation that was owned by a corporation, whose leaders have decided to transform and hand it over to the community. This gesture goes much beyond symbolism. Ralph Waldo Emerson's famous quote "What you do, speaks so loudly, that I cannot hear what you say." This quote is so evident in this case. Novessendes' leadership sent a strong and very unusual message to the community, while taking all the necessary steps to empower them to be in charge. This inspired a great deal of people in the community and other corporations to get involved, seeing the absolute generous gesture, and not just words, an act of self deprivation for a higher cause has been a great source of inspiration for the community, and a great catalyst to spark proactiveness, collaboration and cooperation. Manolo Pique, President of Fundació Novessendes, always stresses the importance of the values and their legacy.

Transformations are not impossible but we knew from the experience of CFSOs in other countries, that they would be quite difficult or less likely to succeed,

but we decided to experiment it on our own skin. One of the FG that entered our program was an already established foundation in Catalunya, that wanted to analyze if they could shift into a CF. In the group and participating in the program, we had both a member of the board and the director of the foundation, taking part in our learning sessions in phase I - intended to give the tools and the information to understand whether a CF is the model that is more coherent with their initial idea and needs. At the end of the phase, when we asked each group to decide if they wanted to continue with the program towards the goal of creating a CF, they in fact decided to drop out. The reason is that the way the foundation was built, its DNA, would have to change to accommodate all the new functions, roles and activities of a CF, and this would most probably disrupt and jeopardise their ongoing activities, and the role that they now had established with much effort in their community throughout the years. They could not foresee, all the consequences this change would entail for the foundation, and they desisted probably for the better. Nevertheless, we are still cultivating this group, in the hope that they will decide to be a catalyst player to found, along with other players of the community, a new CF with its own separate DNA.

Another transformation that we are trying out, and that we still don't know whether it will reach a good port, is the transformation of a cooperative into a CF. The idea for them, is to create a stronger legacy, and to create a CF with the community. The will is there, they would even be willing to use one of the properties of the cooperative as the initial endowment (30.000 EUR in Spain) but for them the problem is a different one. This cooperative has been brilliant in attracting people interested in a certain way of living sustainably. Hundreds of children and adults from all around Catalunya have been using their facilities during summer camps for decades, so they are emotionally connected to the place. Nevertheless, the cooperative is quite disconnected from the nearby community, so, making this leap, means being able to involve the actual physical community. We will see what happens next, the reaction of the community, when they see the willingness of this cooperative to open up to them, and try to collaborate, whether they will reciprocate and accept to join forces in a common plan for the area. We are helping this FG putting together a communication plan to choose the right messages and channels to involve the community.

In the case of the future *Fundació Comunitària de la Vall de Camprodón (y Ripollès)* a well-respected gentleman named Salvador Mas de Xaxás (Board of Directors of AEF), a lifelong expert in the philanthropic field, saw an immediate opportunity when he learned about the CF model. He not only started the process of creating one in the rundown town where he went to live after COVID hit, to rescue his handicapped son from the lockdown in the city of Barcelona, but he convinced Elena, a friend of his, of the worthiness of the model, to create the *Fundación Comunitaria Raimat-Lleida*.

Elena de Carandini is currently pushing another of our groups with great enthusiasm and strength, and gathers her motivation from her greatgrandfather Manuel Raventós, who in 1885 made the Castell of Raimat his residency, and transformed a desert around him, in what is now, one of the most renowned lands among Spanish vineyards. She feels compelled to follow in her greatgrandfather's footsteps, adopting those same values of wanting to contribute to the development of the community, that saw her family history for generations. Both Salvador and Elena, are known and have a very good reputation among high profile people and corporations of their respective areas, so this will make it easier to gather the necessary funds for the initiation and sustainability of their projects.

The motivation, is the engine that needs to be well built in order to make a group of people come together on a long period of time, to dedicate time, energy and resources to the cause. If the motivations are found to be very different among the members of the group, there needs to be a longer period of discussions, possibly more meetings, to align values and aspirations in a coherent project.

## **B. The importance of building an initial founder group with a good combination of complementary factors**

Three broad categories can be identified:

- A combination of different sectors: private, education, legal, fiscal, communication, health, culture etc.
- A combination of different ages to attract different constituencies.
- A combination of different complementary personalities/roles: the convenor, the talker, the organiser, etc.

Complementarity of the members of the FG is important. There needs to be a good mix in roles and characters, different ranges of ages to represent demographically the community and to be able to engage and involve younger generations in the management and creation of the foundation, and most importantly there must be sufficient people and energy in order to get things done.

The Spanish program owes many of its strategies to the Romanian experience, given that Romania has similar socio-economic conditions. Alexandra recalls from her experience working with ARC in Romania in supporting FGs “We saw that the groups would fly better if they had a good mix of different archetypes, different personalities and behaviours: the catalysts, the talkers, the involvers, the convenors, the risk takers, the conservatives etc. Each archetype plays an important role”.

The future *Fundació Comunitària de la Vall de Camprodon (y Ripollés)* is one of our best examples of a good blend. The group is led by Salvador who is in his 80s, very well known in the private and third sectors. He is also a board member of AEF, and when he heard about the model he immediately understood the value of it, and the importance of identifying and involving members of younger generations when constituting a group. So he involved Anna, a young woman who was studying in Barcelona, who is going back to her hometown with a culinary project in mind. This combination brings different energy and perspectives to the table and it's necessary for the success, continuity and sustainability of their future foundation.

Our FG in León for example, is a group of wonderful and very promising young entrepreneurs wanting to revitalize the city, but at the moment we need to help them find ways to involve and attract older generations, people with connections, that have built reputation and trust in the community, able to attract the means for the foundation, and to give credibility to the project.

In the case of the *Fundación Comunitaria Raimat-Lleida*, Elena understood that she needed to involve people that were in closer touch with the day-to-day life of the community, and not seen as an outsider. She was able to involve the former mayor of Raimat, now founder and director of the only primary school in Raimat. People working in the education environment or in the health sector (midwives for example), are in touch with very different social classes, with the children and with their families, so they have the pulse of what the community thinks and needs and normally can easily spread a message. In this group we also have an expert in finance and accounting, and a lawyer whose clients include corporations in the area.

There has to be a catalyst and a go-getter that really pushes the project at first, a person willing to hold the weight of the responsibility of the initial project. But this is a collaborative effort, and the success of the project depends on the ability of the catalyst to involve permanently as many people as possible from different environments. If the initiator is perceived as an outsider, because he or she does not actually belong to the community, or because he/she have recently come back after a long absence, or for whatever reason, we need to make sure to involve people that are perceived by different sections of the population as an active and integrated part of the community. Also, the more the better, because we need to divide the efforts, and we need people to dedicate time to different aspects of the management of the CF.

This said, there is no rule with this. A small initiative group of people that are on the same page and understand the plan, seems to be more operational than a larger group. There will be time to represent the community once the foundation is created. The time the process will take, will vary depending on many factors, including the idiosyncrasy of each place that can be very different in different parts of Spain.

C. Dedicate some time in helping the Founder Group think and decide the best mix of roles that they can have as a Community Foundation, in order to serve their community in the best of ways.

Groups get stuck in wanting to know or wanting to define concrete activities they will undertake as a CF to help them explain what they will do to develop the community once the foundation will be active. Prioritising roles and crafting a strategic portfolio depending on the context is key: in order to do so, we need to map what is already there to understand what is missing in that particular community, in order to offer what they actually need.

Reflecting on our role, has to be a continuous exercise because the role of a CF should be evolving and adapting to changing circumstances. A CF needs to reimagine from time to time its unique value proposition to the community in order to be relevant, and to be perceived as relevant.

If we take a close look, Spanish existing CF have completely different roles, but for all of them community engagement is at the core of what they do, and has been the secret of their success and for lasting for many years, even during times of deep crisis for the country. Except for two, they have no endowments, and donor services or funds management are not part of what they offer.

The *What's Next for Community Philanthropy Initiative* ([Monitor Institute, 2014](#)) identified more than 45 potential roles that community philanthropy organisations can play (refer to the table on the following page for the full list of roles they have identified). No single organisation should try to play all of these roles, but knowing the full array of what's possible will allow them to sort thoughtfully through what their organisation needs to look like, in order to address the most pressing needs of their constituencies.

The report states “The models of Community Foundations today vary almost as widely as the communities in which they’re based. While many organisations remain focused on traditional activities like endowment management, donor service, and grantmaking, other Community Foundations have begun to experiment with new opportunities for serving their communities, from financing social impact bonds, to facilitating community dialogue. Yet, despite a growing record of innovation, the prevailing narrative of the Community Foundation field has remained largely unchanged as the model hits its centennial anniversary. Instead of a story of adaptation and diversity, the field is still viewed as if it had a single, uniform model – acting as a charitable bank for their communities – that no longer really represents the heart of what many Community Foundations do. This dated narrative is beginning to hold Community Foundations back. It prevents outsiders from seeing the vibrancy and innovation going on in the field, and it pushes many community philanthropy organisations to retrench defensively in the face of new competitive challenges at a time when they would be better off opening

themselves up to new ideas and new ways of serving their communities. We need to open up their thinking and explore new innovations and new possibilities for serving their communities”.

<p><b>Expanding Financial Capital</b></p> <ul style="list-style-type: none"> <li>Educating the public about philanthropy</li> <li>Soliciting giving from local donors</li> <li>Soliciting capital from outside the community</li> <li>Deliberately attracting diverse donors</li> <li>Developing earned income to support social-purpose activities</li> </ul>	<p><b>Sharing Community Information</b></p> <ul style="list-style-type: none"> <li>Researching community issues and public policy</li> <li>Compiling information about local organizations and available resources</li> <li>Spreading local news</li> <li>Tracking data about community well-being</li> <li>Measuring the outcomes and impacts of programs</li> </ul>
<p><b>Deploying Financial Capital</b></p> <ul style="list-style-type: none"> <li>Grantmaking to nonprofits</li> <li>Supporting individuals (scholarships, fellowships, etc.)</li> <li>Impact investing</li> <li>Directly connecting givers and recipients</li> </ul>	<p><b>Aligning Action</b></p> <ul style="list-style-type: none"> <li>Facilitating learning networks</li> <li>Coordinating funding and activities</li> <li>Building collaboratives</li> <li>Managing formal collaborations</li> </ul>
<p><b>Financial and Donor Service</b></p> <ul style="list-style-type: none"> <li>Managing investments/endowment funds</li> <li>Managing transactions for donors</li> <li>Educating donors about community issues</li> <li>Providing philanthropic advisory services</li> <li>Connecting local philanthropists with each other</li> <li>Co-creating initiatives with donors</li> </ul>	<p><b>Advocating</b></p> <ul style="list-style-type: none"> <li>Promoting specific organizations and interventions</li> <li>Influencing public opinion</li> <li>Influencing government and business priorities</li> <li>Lobbying for public policy change</li> </ul>
<p><b>Building Capacity</b></p> <ul style="list-style-type: none"> <li>Promoting nonprofit organizational effectiveness</li> <li>Developing the skills of local residents</li> <li>Growing local entrepreneurs and businesses</li> <li>Providing direct support to local government</li> </ul>	<p><b>Community Planning</b></p> <ul style="list-style-type: none"> <li>Facilitating urban/rural planning processes</li> <li>Promoting economic development planning</li> <li>Planning for disaster response and prevention</li> <li>Proactively planning for the long term</li> </ul>
<p><b>Engaging the Community</b></p> <ul style="list-style-type: none"> <li>Facilitating civic participation and volunteerism</li> <li>Providing avenues for community input, ideas, and connection</li> <li>Facilitating community dialogue</li> <li>Strengthening social connections among residents</li> <li>Empowering resident decision-making</li> <li>Mobilizing residents around issues</li> </ul>	<p><b>Direct Service and Programming</b></p> <ul style="list-style-type: none"> <li>Starting new nonprofit programs</li> <li>Managing direct service programs</li> <li>Designing government interventions</li> <li>Managing government programs</li> <li>Incubating social enterprises or businesses</li> </ul>

What is increasingly apparent in all of these instances, is that CFs aren't just one thing. They're exploring a broad range of different roles that are possible in their communities – some traditional, like grantmaking, endowment

management, and donor services, and others less so, like incubating social enterprises, developing the skills of local residents, and facilitating community dialogue. Forward-looking CFs are piecing together the right combination of roles, given local needs, goals, and capabilities.

We need to be strategic in spotting where community needs aren't already being met, because looking at these spaces may open up new ways for CFs to serve their constituencies over time. Prioritising roles and crafting a strategic portfolio is key. We need to understand what roles are at the core of the organisation, which are adjacent or complementary to that core, and which are aspirational for the future. Doing so will allow a CF not only to build a strategic portfolio of activities focused on a coherent core, but also to constantly experiment and test new ideas that might become more important in the future.

There will never be a single, correct model for a CF. The challenge will be to find the elements of the CF model that are right for each community and each situation, and to be ready to adapt and change as the community does, and to test old assumptions and approaches from time to time. Each CF will need to reimagine creatively its unique value proposition to the community – and then keep reimagining it, because the world around the foundation isn't going to stop changing, nor will its community and donors. So adaptation needs to be a continuous process. And the community philanthropy organisations that truly flourish – whatever they may look like – will be the groups that have the capacity to adapt and innovate in an ongoing way: the ones that constantly look inward and challenge assumptions, look around to learn from others, and look outward to anticipate what the future might bring. Innovation doesn't need to be completely new; it just needs to be new to you and your community. So the easiest way for Community Foundations to start down the path to innovation is by simply “copying shamelessly” from what is already going on around them.”<sup>2</sup>

### Analysis of the variety of combination of roles that existing CF have in Spain, and the role that new groups are envisioning for themselves.



In **RED** the first batch of Founder Groups

In **BLUE** already existing Community Foundations

In **GREEN** the second batch of Founder Groups

<sup>2</sup> Deloitte Consulting LP. What's next with community philanthropy: Making the case for change By Gabriel Kasper, Justin Marcoux, and Jess Ausinheiler, June 2014

Of the 5 living and active examples of CF in Spain, not one looks like the other in terms of the role they have within the community. Let's have a look at them, to have an idea.

*Fundació Horta Sud* (Torrent, Valencia), a 40 years-old organisation, originated from a Saving Bank (Caja de Ahorros de Torrent) is one of the few (together with Fundación Maimona in Extremadura) to have a substantial endowment, or an endowment at all, in this case 1 million EUR endowment. Apart from managing this endowment, *Fundació Horta Sud* has at its core the role of building capacities, supporting associations, promoting non profit organisational effectiveness, preservation of traditions (through the management of a museum), sharing community information, aligning action, facilitating learning networks and collaborations among associations. Managing direct back-office services programs and grantmaking to not for profits is for them an adjacent role, given they only award 13 collaborative projects every year, 1000 Eur each, but it's still a good way to have an open channel with the grassroots organisations and informal groups, that would otherwise have no other way of funding its activities. A great added value of the grantmaking program, even if small, is that going to see personally and physically the projects they support, and to see their impact, has been highlighted and regarded as one of the greatest satisfaction for the employees year round. It creates a sense of purpose within the organisation, and a connection with grassroots organisations and the community. Unfortunately, although advised otherwise by the Bertelsman Foundation over 10 years ago, most CFs in Spain, still don't have grantmaking programs.

*Fundació Cívica Oreneta* (Badía del Vallès), is 15 years-old in a very small area of 1Km2 with a presence of many organisations working locally. The foundation was initiated by Javier, who had been for decades involved with the federation of social action organisations, who was used to listening to the associational fabric, and had learned from the mistakes and the tensions of these types of networks. This CF is very strong at engaging the community, facilitating civic participation and volunteerism, providing avenues for input, ideas, and connections, building capacities, developing skills of local residents (especially internet digitalisation for the elderly), creating income from services (lending insurance to organisations), good at attracting the old and the young over a long period of time (through online chess tournaments, online meetings and conferences and workshops of all kinds for the elderly that connect daily from their homes).

*Fundación Los Santos de Maimona* was founded by Diego Hidalgo Schnur, one of the biggest philanthropists in Spain, in the small town where his family was originally from. This foundation is very unique in incubating social enterprises through a Social Lab and providing grantmaking programs for entrepreneurs,

managing investments and endowment funds, engaging with the community and developing the skills of the local residents and all of Extremadura, and building spaces for collaboration and alliance.

*Fundació Novessendes* in Torrent (Betxi) is strong at facilitating civic participation, engaging the community, in direct programming and implementation of programs that no one implements, community planning leveraging on a very smooth and good relationship and cooperation with the Public Administration, promoting economic development for the area, that is sustainable.

*Fundació Comunitaria Tot Raval* in the Raval neighbourhood of downtown Barcelona is involving absolutely everybody (shop owners, cultural facilities, associations, public administration etc.) in doing community planning, engaging the community, building capacities, co-creating initiatives with donors, tracking data about community well-being.

New founding groups are still working on their strategic portfolio but so far the future *Fundació Comunitària of Raimat-Lleida* will be educating donors about community issues, connecting local philanthropist with each other, developing skills of local residents, co-creating initiatives with donors, it will host a Social Lab to develop new and innovative ideas, it will implement grantmaking program for entrepreneurs, and it will organise a Festival, similar to the one done by the Community Foundation of Napa Valley, with which they are already in touch to create a twinning.

Future *Fundació Comunitària de la Vall de Camprodon (y Ripollès)* will start by researching community issues, coordinating funding activities, connecting local philanthropists with each other, engaging with the community to provide avenues for community input, ideas and connections and together decide this strategic portfolio, to create more ownership by the community.

It is important that even when the initial group arrives with a very clear idea of the role they would like to undertake as a foundation, that we guide them in including the community in the process of designing what the CF should be doing, in order to be relevant, and in order for the community to feel represented, included and to feel ownership of the project.

#### **D. Convince the Founder Group that the best way to start engaging effectively with the community is by asking and listening**

Understanding people's thoughts (needs and aspirations) in the form of an inquiry in Betxi involving shop owners, that would distribute them to their clients, for *Fundació Novessendes* has been found to be very positive in its early stages and as a starting point. As director of the Foundation, Esther Paulo said "If you listen, you will know what to offer". She also added, that for them,

having coffee in the square every morning goes a long way in listening, learning and taking the pulse of the community “It has been a good ice-breaker with the community, to launch our presence and to give the clear message that we want to know their opinion, so as to communicate that we care about what they think, their priorities are our priorities, we are in this together, what they think our community needs is important, what they think in general is important, they need to understand that what they dream for our community may be possible if we join our forces, I am listening, I make the effort of knowing what are your needs and desires”. For them, having a very representative board of people that are involved with the Foundation, and active in the community, was also another way of engaging the community at its highest potential.

Stimulating a vision for change is a game-changer. Asking people how they would like to see their community in 5-10 years, imagining scenarios to portray possibilities and opportunities, building on the idea of dignity, empowerment and self-determination, instilling the idea of self-reliability and self-sufficiency, meaning that within our communities we will take care of ourselves and our people, and we will not be waiting around for the public sector to solve all of our problems, and/or to develop our ideas and projects for the future. All of this creates a different mindset, creates an atmosphere of cooperation, enables people to think of something that they are not used to thinking anymore, given that we have delegated to third parties the well-being of our surroundings and ourselves.

As a CSFO we believe that asking and listening, instead of talking and proposing is a good way for our Founder Groups to start engaging with the community. Especially with groups that are getting bigger as they increasingly involve more people as they move forward, we are insisting on these types of envisioning exercises, starting from thinking of what it is about their land and their community that they like the most, things that are worth highlighting among its assets. We need to start from an opportunity mindset, and we need to put the focus on what we already have, to leverage on that, in finding and creating new opportunities. How we would like to see our community evolve in 5 or 10 years is an empowering exercise, it create a sense of belonging in the group, helps the groups to get in sync on the same frequency, boosts the proactiveness of its members, puts them in the driving seat, helps them get into a mentality in which they are in charge of shaping their future.

*Tot Raval* organises a week long Festival with incredible activities for different ages and publics throughout the neighbourhood. In over 20 years of activity of the foundation, they have constituted many different commissions according to interest, that listen to the people. Everyone has the possibility of contributing in the field of their expertise and/or of their interest. You can tell from the offer of the Festival, that they know how to engage young people with activities that may actually interest them (graffiti, tours, music, sports), and the way you tell is from the great turn-out of people that participate.

Listening to Axel Halling of the Bündnis der Bürgerstiftungen Deutschlands (German Alliance of Community Foundations) in his presentation in one ECFI's meetings for CFSOs in emerging countries, one of the challenges nowadays, even for Germany, that has an established network of strong community foundations with a considerable history and experience, is to find new generations interested in participating and in managing these foundations, that are seen mostly as institutions run by the "older folks". They are now looking into creating spaces of intergenerational exchange, looking into the use of technology as a way to maximise the work of the community foundation and their impact. The unexpected effects of COVID-19 have accelerated this process.

Something similar has happened during the pandemic with *Fundación Oreneta*, that on the other side of the spectrum, has seen the drop in participation of the older people, even after the lockdown had ended, for fear of getting sick, and had to find new ways to connect these older generations from their houses by teaching them how to log-on the computer and participate in daily sessions with their peers to end their isolation. This project has won a prize for its innovation from BBVA Bank.

**E. Give time to the process to unfold itself. It's like a plant that needs to be watered. It won't grow overnight. We need to give the information strategically.**

Each group has a different timing, but they all need constant and personalised follow up.

A CFSO's role is to serve as an accountability system, like a coach that helps you translate planning into action. As György Hámori (Program Lead at Roots and Wings Foundation, Hungary) has also evidenced in his research for this Learning Lab, on what creates motivation in FGs in Hungary, is that dividing the process in smaller tasks and celebrating along the way when reaching those milestones, is a great way of maintaining momentum.

On a similar note, Jiří Bárta, (Head of the Endowment Building Campaign at Via Foundation, Czechia), pointed out the importance of releasing the information as needed, and in a balanced way, not to overwhelm and scare the FG with all the requirements and activities that they will need to fulfil, especially in the beginning. The CFSO has to find a balanced way of providing the information and the tools needed by the groups as they advance, and it has to choose wisely the pace at which it gives the information to the FG.

Alexandra Stef also highlighted the importance of showing them the way with confidence, telling them what they need to know step by step, because if we tell them everything at once, we scare them. She also highlighted the importance of small achievements that need to be celebrated. We want them

to have all the information, but sometimes it's just too much. Grantmaking, board development, listening to the community are all important and interconnected. They all contribute to making explicit the full potential of CF, but they need to be able to do that simultaneously, but it can become overwhelming, and wanting to address everything at once hinders our efforts.

Knowing when it's worth continuing to invest in a group and knowing when to stop investing resources in a group, and use those resources more efficiently on another group, that is an art that comes from experience. Sometimes the group is just not ready at that moment in time, and we have to have patience, let them stew while we continue cultivating other cases. Like our Canary Island group that surprisingly dropped out of the program as soon as they were selected, because their circumstances had suddenly changed for the immediate future, but their intentions of creating a CF were still valid. We put them in touch with the *Global Sustainability Fellows Program*<sup>3</sup>, to join forces in doing a first research on the situation of the island, to create new relationships and open spaces where people can collaborate, and see if that actually leads to a CF, and they can rejoin later, or in the case of the FG in Bierzo, where we need to organise an event to be able to find more human resources for the group, more energy to be able to push the project forward, because we think the área (Bierzo) has a good sense of identity and critical mass.

### **Next challenges**

In Spain we have one more year to reach the goal of supporting the creation of 5 new CFs. As we move forward, we need to find the best strategies to disseminate the concept as widely as possible, in order to identify and to reach potential groups. So far we have been throwing a net with AEF's channels, but as it would be natural to happen, less and less applicants will presumably be coming in for every call. We need to find other strategies to disseminate the concept, and to reach people that could be interested.

This is a type of program that takes years to show results, and this is why the biggest challenge now, is to secure funding for the next 9 years of the program. The fact that the process of creating these foundations takes long, affects directly the funding of the program. Very few donors have a vision of investing in projects that will bring impact only in the long term, like the Mott Foundation and Fundación Daniel y Nina Carasso that are currently funding our program.

The sustainability of the program is at stake. People need to visualise what these foundations are capable of achieving, the kind of impact that these institutions are capable of having on our society in the long run, because we

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<sup>3</sup> <http://www.sustainabilitylabs.org/gsf/home/>

know they are worth investing on. The more CFs we will manage to help create, the more examples we will have to show to our prospects.

A third challenge is to create a community that brings together new and existing CFs. So far it has been successful, but you need to provide them with expertise, tools that they need or that they can improve with. There needs to be a good value proposition to keep them engaged. Existing foundations have joined the program with the Founder Groups of the 1st Call, to start building a community and to receive the technical assistance that we are providing on things like fundraising, community engagement etc. Furthermore, as part of the program, we have offered already existing CFs, a 6 months' assistance that is free for them, to help them improve with their fundraising techniques and strategies. They have all welcomed the course, and they are all participating on a weekly basis. AEF as well is participating and benefitting from the course, as any other participant in the group, blending in with them as peers.

In February we will be launching a third call for FGs, for which, as mentioned above, we are putting in place a more aggressive communication plan, given that we need to include new ways of reaching new people, and more ways of reaching more people. There will be more lessons to come in the 2nd year, and an evaluation of the program, in collaboration with ESADE Center for Social Impact. We will be reflecting on the first three calls for proposals, on all the groups we selected, and we will be analyzing the strategies that we have used to engage with already existing foundations and with newly founded groups, in order to ultimately create a Spanish community of Community Foundations, that collaborate to improve our society, and life in general, for all of us. We are all connected. We are one.

## Annexes

### The program itself was a testing space



- + Observations from 2nd Call for Groups launched in March and in October 2021. In the 1st Call we selected 10 groups, in the 2nd Call we selected 5 more groups for a total of 15 groups. So the Program has been walking with the first batch for 7 months (now in Phase III) and with the second batch for one month (end of Phase I)
- + 12 formative sessions with the 1st groups, and 5 sessions so far with 2nd group
- + 15 mentorship sessions with the 1st FG.
- + Facilitating the interaction of new initiative groups with existing CF to build a community of CF.
- + Experience of 2 events supporting the initiative groups while presenting the idea of the CF.
- + Field visits to 2 existing CF: Fundació Novessendes and Fundació Horta Sud (both Com. Valenciana)
- + Current support programmes offered by a good number of CFSOs in the world. Their websites and from the experiences heard while participating in monthly meetings with ECFI, and the Latin American CF Group (CIAF).

## **Interviewees and desk review**

**Program Officers/Director Generals and analysis of 5 existing Community Foundations to inquire on their early stages, and on their current role in their community keeping in mind Bertelsmann's recommendations after 10 years:**

- + Tot Raval (Raval neighbourhood of Barcelona)
- + Fundación Comunitaria Los Santos de Maimona (Extremadura)
- + Fundació Novessendes (Comunidad Valenciana)
- + Fundació Horta Sud (Comunidad Valenciana)
- + Fundación Cívica Oreneta del Vallès (Catalunya)

**2 CURRENT INITIATIVE GROUPS at a more advanced stage in their efforts of involving the community:**

- + Future Community Foundation Raimat-Lleida/Elena de Carandini (Catalunya)
- + Future Community Foundation in Ripollés/Salvador Mas Xaxas/Anna Pixou (Catalunya)

**People that either have created or helped groups create a Community Foundation in other countries:**

- + In Romania - Alexandra Stef
- + In Mexico and other Spanish speaking countries - Agustín Landa (Mott independent consultant)
- + In Czechia - Jiri Barta

## **Desk Review**

- + 2021, Rosa Gallego CUNY paper "Community Foundation building: Identifying key capacities for the Spanish context",
- + Carles Massot CUNY paper "Establishment and development of Community Foundations in Spain: Learning from other national contexts to foster a thriving and sustainable Community Foundation movement";
- + Bertelsmann Foundation's analysis of the 5 Civic Foundations that we consider for this study.
- + 2013, Program Evaluation of the Romanian Experience "ARC's Leadership in Community Foundation Development in Romania: Looking Back and Looking Ahead" by M. Patten, S. Cibian and B. Strecansky;

- + Deloitte Consulting LP. What's next with community philanthropy: Making the case for change By Gabriel Kasper, Justin Marcoux, and Jess Ausinheiler, June 2014;
- + Inquiry of Novessendes CF in Betxi to the local community to establish local priorities (analysis of the questions and results);
- + Civic engagement as a factor for co-production and co-creation in urban development. Oto Potluka. Center for Philanthropy Studies, University of Basel, Steinengraben 22, Basel, 4102, Switzerland;
- + How is civic engagement developed over time? Emerging answers from a multidisciplinary field Erik Amnå\* Youth & Society (YeS), Örebro University, SE-701 82 Örebro, Sweden. Journal of Adolescence. Volume 35, Issue 3, June 2012, Pages 611-627;
- + Systems to #ShiftThePower – Barry Knight. Global Fund for Community Foundations;
- + Theme 2: Engagement. Ways in which CFs can intensify citizen / community / donor engagement (written as stimulus for a discussion in travel groups with CF hosts (Boris Strečanský, September 2014).

## Acronyms

AEF: Asociación Española de Fundaciones

BF: Bertelsmann Foundation

CF: Community Foundations

CFSO: Community Foundation Support Organisation

ECFI: European Community Foundation Initiative

FG: Founder Group