

SUMMARY REPORT

THEMATIC MEETING

14-15 November 2016, Paretz Academy

The European Community Foundation Initiative's (ECFI) first Thematic Meeting was conceived as an opportunity to deepen ECFI's interaction with CF support organizations across Europe. All known active CFSOs in Europe were invited as well as - for those countries where no support organization currently exists - CFs or other organizations with an interest in supporting the expansion of CFs in their countries.

Aims

- ∴ To improve understanding of the CFSO landscape
- ∴ To identify common challenges and learning needs for plus interest in follow-up
- ∴ To strengthen relationships among CFSOs in Europe

LESSONS, CHALLENGES AND NEEDS

- ❖ *Lessons:* Good new ideas generate public attention; long-term nature of the work; burnout; has existed for 20 years.
- ❖ *Challenges:* Identifying a common CFSO agenda that is practical, tangible and manageable; different understanding of CF about CF roles; aligning the interests of CFs and CFSOs; generational change (in CFs and CFSOs).
- ❖ *Needs:* To better understand the idea of community; it is a good idea to let CFs learn from each other; openness to sharing & working together; courage to think outside the box; people to run CFs / leadership; capacity; strong partners, donors, cooperation.

Though not taken further by any group during the meeting, it is useful to note perhaps the three inter-related issues of burnout (in particular of Executive Directors), generational change (in CFs and CFSOs), and people to run CFs / leadership that were raised in this session but not addressed by a group. One of the suggestions of additional key themes for future work raised by one of the participants at the conclusion of the meeting was the theme of leadership and the potential of peer coaching. These topics may be worth revisiting in future activities.

HOW COULD THE NEEDS OF EUROPEAN CFS/CFSOS BE MET?

In the small group session that followed, participants were asked to provide input on what specifically might be done to address the needs identified across multiple countries. They were asked to come up with practical suggestions that they could pursue, together with ECFI, to address the needs.



Group 1: POLITICS/CONTEXT

Inputs to group discussion (from earlier small group brainstorm of lessons, challenges, needs):

Needs: To learn and understand what we can do in the context of shrinking space for civil society; operating/developing in a hostile environment; discussion on what a CF is on a national level with field activists; reformulate/rethink our work in the context of changing politics and reality of increased divisiveness (focus on young people!); need to support civil society groups and associations, especially small ones; encourage and provide options for CFSO and CFs to go/think beyond the local context.

Result of group discussion:

- ∴ There are some fundamental values and human rights that are our basic benchmark below we should not go. This implies working at the level of standards, reminding the community of basic human values and rights, and serving as a convener around issues when rights are violated.*
- ∴ Vital Signs is an example of a tool that can support a careful monitoring of the context in which CFs operate.*
- ∴ CF is about human capital - the role of a CF is to translate - between businesses and local groups and local politicians in a very independent way. The key issue then is how we can become better “translators”.*
- ∴ We need to have information and assess local needs. Vital Signs is an example of a tool that can support a careful monitoring of the context in which CFs operate and ensuring that the full (and not only likeminded) set of people are invited to round-tables to discuss issues. We would need to organize even more meetings where we act as translator.*
- ∴ Training and strategic communications are also critical.*
- ∴ At the level of ECFI, there would be a need to invest in human capital and bring more specialized knowledge that can be used at a national and local level. For example, activities which help national support organizations to invest in the human capital of local CFs. This investment, in turn, will make them better able to invest in the human capital of their communities. Mentioned in particular was the importance of gathering a group of people from CFSOs to read the changes and connect them with experts and resource persons for a deeper understanding of the context (and perhaps possible responses). Nourishing the people at the national CFSOs with academic information, knowledge and connectivity to allow people to see a bigger picture - this would be a powerful role for ECFI to assume and does not have to cost a lot of money.*

There was also some discussion in the large group about Vital Signs and the role of CFs vis-à-vis politics given that issues in communities often have political dimensions. While some felt that CFs should not take political issues forward proactively, they argued that a CF could work with NGOs that deal with these issues, thus helping to place them on the

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agenda and raise community awareness about them. At the same time, they felt the foundation itself should not be an activist. Others contended that it is difficult to remain neutral, especially in challenging political times, or that sometimes a particular political agenda is ascribed to CFs even if they do not want to be political. One response offered in terms of the use of Vital Signs was simply to present the figures without commenting on whether the data indicates that too much or little is being done, and to focus on starting a well-attended, multi-perspective community discussion.

The large group discussion of these ideas resulted in considerable enthusiasm for the idea of a European Vital Signs initiative. A number of people indicated their interest in pursuing this idea further (see the Ongoing Engagement section at the end of this report for the individuals particularly interested in this topic).

Group 2: FUNDRAISING

Inputs to group discussion (from small group brainstorm of lessons, challenges, needs):

Challenges: Find long-term or new partners to support operational costs and core work; fundraising locally in huge economic crisis (54% unemployment in B&H); legislative restrictions (affecting grant making); no tax incentives for business donations (Georgia, Serbia, Slovakia, Italy, Croatia); legacy tax; businesses want sole ownership of projects when giving funds

Needs: Need for grant making funds; engaging diaspora communities

Result of group discussion:

- ∴ Produce best-practices publications on engaging diaspora (in investing in communities) and fundraising locally in context of economic crisis. The target audience would be staff of CFs.*
- ∴ Create a prize for ideas.*
- ∴ Cross-border philanthropy (perhaps ECFI could help identify and link European CFs or others outside of Europe in support of cross-border, diaspora giving, or so-called “sister CFs”).*
- ∴ Establish and lead CFs in making use of a European Giving Day in which fundraising events take place on the same day to raise the profile of CFs (this would require some planning to ensure coordination and best results).*
- ∴ Create funds and methodology for CFs to engage in piloting new fundraising approaches so we can share methodologies and learn through practicing new ideas.*
- ∴ Provide basic training.*
- ∴ Offer internships that allow for exchange of expertise (ECFI’s CF2CF opportunity, which is also open to CFSO exchanges, is an existing way of pursuing this).*
- ∴ Create information on income-generating activities and business models.*

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With regard to issues of legal framework that had been raised in the initial discussions, this group expressed some uncertainty about how national experiences might be generalized and felt that this area of work was less of a priority. If pursued at some point, they also felt it would first require greater discussion of the legal and tax environments across Europe to identify any specific common aims that might be pursued. They also indicated that this would most likely require advocacy work as it would need to be oriented towards the European institutional level. *If indeed this type of effort were to be pursued further, they specifically proposed:*

- ∴ Considering creating an alliance with European Centre for Not-for-profit Law*
- ∴ Further investigation and possible pursuit of a 1% EU campaign (Slovak style)*

The group concluded that perhaps the only role ECFI could play is in recommending and promoting an approach to the legal and fiscal environment in Europe that would best support CFs. In other words, ECFI could recommend the types of laws and fiscal arrangements at a national level that would facilitate the work of CFs in Europe. The idea of delving more deeply into the business models for CFSOs in and beyond Europe was also raised i.e. how can CFSOs create a business model that generates support for the organization's mission over the long term?

Group 3: CF MODEL AND VALUE PROPOSITION

Inputs to group discussion (from earlier small group brainstorm of lessons, challenges, needs):

Lessons: Building trust with people takes time; only one model (endowment) is actively promoted; open approach of CFs leads to difficulties in making results tangible; having a specific target (audience or issue) may help build public understanding and trust in CFs; having an impact evaluation tool for CFs is important; sustainability of networks is fragile

Challenges: There is no standard model; explaining what a CF is/does; gap between citizens & groups working for citizens (trust lacking); public perception (CFs linked to “marginal” human rights CSOs); finding balance between being operative and grant making; legal distinction between CFs and other types of organizations limited (meaning it is difficult to show difference) (esp. Croatia)

Result of group discussion: An Action Plan for 2017

Goal: Understand the identity of the CFs in Europe through a participatory approach that includes:

- 1. Study: Collect information*
- 2. Present the study and case studies in Cardiff*
- 3. Draft a declaration*
- 4. Open up the signature process - on the declaration of what is the community foundation*

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Step-by-step actions (and who would be involved):

- 1. Collect existing criteria/standards/definitions/contexts using desk research and survey monkey tools. One suggestion was to use desk research to find out what kind of community organizations exist in each country (Atlas and other data) and only then to inquire with CFs specifically (as some may have a very different form and shape). (ECFI and CFSOs)*
- 2. Analyse and compare data collected in order to identify the common aspects (ECFI & committee of experts)*
- 3. Present the results of the study and some case studies at the Cardiff conference (Sept. 2017) (ECFI)*
- 4. Prepare a declaration on the common aspects of CFs (ECFI and committee of experts)*
- 5. Open up a signature process (ECFI and CFSOs)*

Group 4: STRATEGIC COMMUNICATIONS

Inputs to group discussion (from small group brainstorm of lessons, challenges, needs):

Lessons: Model promoted from outside; it is good to have a brand to “sell” the concept; however, one model can be too restrictive for local context

Challenges: Government and donors do not understand support organizations

Needs: Promote our identity/image; brand for CFs in Europe; be able to tell our story; strategic communication = communicating the added value of the CF in the community (addressing Roma issues); need to convince EU and other large donors; impact evaluation tool for CFs; information/communications technology/ICT to facilitate the network

This group agreed that Europe needs this type of organization and that now is the time to show that CFs do more than just promote a little project here and there or do what the government says they ought to do; in other words, that CFs do important and sustainable work. A participant in the group commented that the field needs ambassadors who are fascinated by our ideas, and another emphasized the importance of increasing visibility through story telling. The Funding Network, based in London, which promotes the model of giving circles globally, was also mentioned in the context of a possible partnership and/or communications outreach.

Result of group discussion:

Audiences: Both internal (to CFSOs, CFs) and external communications will be needed (to researchers; bureaucrats (EU), big private donors, important CSOs)

Specific benefits that CFs can offer Europe

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- ∴ Find sustainable solutions in the community (local)*
- ∴ Flexible and immediate reaction to challenges on the local level*
- ∴ Working towards the common good. CFs are value-based, normative responses, working on issues such as social cohesion, education access, inclusion, integration, participation*
- ∴ Leadership in the community*
- ∴ Education of active people/qualification*
- ∴ Engaging people*
- ∴ Platform for creativity*
- ∴ Accountable and trusted partner for both financing and engagement*

How we might proceed:

- ∴ Develop slogan*
- ∴ Develop message with energy*
- ∴ Establish “brand”*

Tools: Facebook, YouTube, Video, Twitter, a press pack, a European portal of community foundations

PRESENTATION ON THE 4C FRAMEWORK FOR PHILANTHROPY SUPPORT ORGANIZATIONS

This presentation by guest speaker Alina Porumb of ARC in Romania focused on the initial results of a WINGS and DAFNE peer learning group effort (which was itself based on earlier *Infrastructure in Focus* reports) to elaborate and test a framework for strategic thinking and the mapping of outcomes achieved by philanthropy support organizations. The 4C framework stands for Capacity, Capability, Connections and Credibility, key areas where philanthropy organizations are felt to make a difference. Alina also shared ARC’s analysis of how its outcome areas - many predating the development of the 4Cs - could be related to the 4Cs framework. She explained that the very process of testing the framework had proven helpful for ARC both in better capturing the areas the organization seeks to impact and identifying where there were gaps in their previous outcome areas or indicators.

EFFECTIVE DATA AND KNOWLEDGE MANAGEMENT FOR CF SUPPORT ORGANIZATIONS

This session, led by guest speaker Larry McGill, Vice President of Knowledge Services at The Foundation Center in the US, outlined the data collection and knowledge sharing tools developed by the Foundation Center to support community foundations, other types of donors as well as grant-seekers. These tools serve the multiple purposes of research, benchmarking, and offering knowledge platforms and data visualization tools.

While some of the tools are currently more oriented to the US, they are building their information on grant making by US foundations outside of the US and the grant making of

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non-US grant makers. Many of the tools are accessible free of charge and a few require subscriptions. Larry emphasized that they are open to partnerships with organizations outside of Europe that are based on reciprocity. In other words, where organizations outside the US are willing to share their information, the Foundation Center will reduce or remove costs for access to agreed tools.

The tool that is most tailored to CFs is CF Insights. Glasspockets (with a focus on transparency) and GrantCraft were also presented, as well as Grant Space, Issue Lab and the Philanthropy News Digest. Larry also emphasized that the value proposition for these tools is the offering of market intelligence (i.e. who is working in specific thematic or geographical areas and how) and monitoring and learning (i.e. transactional, contextual and outcomes/impact data). He then led two short exercises with the group on the value proposition for contributing to joint data collection at a European level and on the principles of knowledge or data sharing.

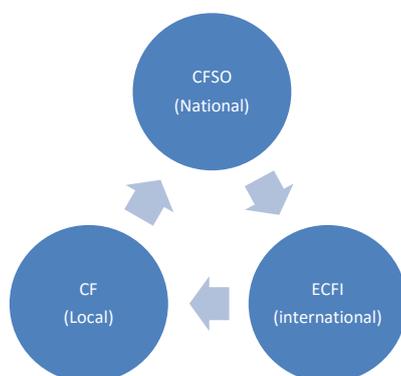
Results of the value proposition for the joint data collection exercise

Audiences for value proposition: to CFSOs, CFs and partners

Slogans: “No data, no credibility - more data, more credibility”; “Put yourself on the European map”

Relevance:

- ∴ Data & Knowledge sharing*
- ∴ Help argue for value of CFs*
- ∴ Document the specific contributions of community philanthropy*
- ∴ Data leads to influence / Data leads to advocacy*
- ∴ Virtual Circle (see graph): allowing for understanding/capturing the bigger picture & creating a more nuanced picture*



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Results of initial brainstorm of principles for knowledge/data sharing:

- ∴ Trust that Information will be used responsibly*
- ∴ Information must be communicated accurately*
- ∴ Data should be accurate/ truthful*
- ∴ Openness - free access*
- ∴ Transparency, acknowledge source of data*
- ∴ Agreement on goal of sharing*
- ∴ Mutuality/Reciprocity*
- ∴ Data is both sufficient and relevant*
- ∴ Source is acknowledged and cited*
- ∴ Confidentiality - especially regarding individuals and their stories*
- ∴ Data storage*
- ∴ Data curation*
- ∴ Collect “useful” data*
- ∴ Collect data that will be used*