



## Report on Peer Learning Event for WINGS members serving community foundations

June 8, 2013  
Winnipeg, Canada



### Introduction

On June 8, following the very successful Community Foundations of Canada conference in Winnipeg, twelve community foundation support organization leaders and practitioners from around the world gathered for a peer learning event. WINGS was represented by Ana Pinho and with the facilitator, Monica Patten, and guest, Barry Knight, fifteen people were actively engaged in the afternoon's work. A list of all participants is found in Appendix 1.

The agenda (Appendix 2) for the afternoon was organized in two parts. The first portion of the afternoon was spent in exploring two key topics. The first topic was on

encouraging giving and the second on tackling tough issues, especially those that are not financial in nature. The second portion of the agenda focused on how WINGS serves community philanthropy support organizations.

The discussion throughout the afternoon was respectful, robust, and informative. Everyone participated though it was clear that speaking in English was a challenge for some. While there was no formal evaluation, informal feedback suggested participants were well satisfied with the time they had spent together and found this to be a positive experience of WINGS.

## **Agenda Part 1**

### **Peer learning topic #1: Encouraging Giving**

Simona Serban (Federation of Community Foundations, Romania) and Alina Porumb (ARC, Romania) each described significant initiatives their respective networks lead for community foundations in Romania. The community foundation field is young and still quite small, individual giving and volunteering/participating is not yet deeply entrenched, but there is some small amount of corporate/business giving and there are promising signs for the future of giving.

Simona described a “swimathon” which started with the Cluj Community Foundation and is now a feature in five Romanian communities (and was profiled in the last Global Status Report). Its focus is on engaging community participation (swimmers and the public) and raising funds for local organizations from businesses and individuals. It has become a well known community event and has served to build profile and visibility for the community foundations who host it. Simona stressed that this kind of event is not limited to swimming – running would work too – and that the purpose is really to show that everyone can participate and give something, perhaps not money.

Alina described several initiatives ARC offers to community foundations in their efforts to encourage giving in Romania. ARC discovers what works and shares that with others; they offer technical support, learning support and a platform for people to give through a bank. They work to mobilize donors locally and have themselves learned from international colleagues, most often in the UK. ARC has been instrumental in the creation of community foundations in Romania and has supported community foundations in visits and learning so they too can develop local giving more effectively. One example Alina offered was donor circles, which were described as offering an attractive model for people to be part of as they learn about giving, and takes them away from the more traditional approach which was described as begging. Donor circles have brought an element of joy to giving, where the donors can be empowered to learn about the community and various projects and can think about what really appeals to them. Alina stressed that ARC, in offering space for shared thinking and resources is committed to shared responsibilities.

Alina and Simona, both of whom described initiatives and approaches that are available to community foundations across Romania, posed the critical question for the group to consider:

How can we make sure the models work in various, different communities while the national brand is maintained and built? We want to keep creativity and understand that each community will adapt but the national brand is important.



The group offered the following suggestions (some have been combined)

- Leadership from the community foundation is the important feature to develop; the model is secondary

- Make sure it is demand driven (locally)

- Corporate donations as a match could be an incentive (good to give money)

- There are “home truths” about what works; each CF will have to find out its own “home truth” and will then learn there is good reason why program is structured the way it is

- The power of the story never fails. Put some donor stories on websites; they will encourage others and show what is possible

- Have someone from community who might want to try an initiative in the room to learn from a more experienced foundation as it plans and implements its initiative

- Create a toolkit which will include helping a community foundation understand if they have the capacity to take on such work

- Build it slowly

- Be very clear about steps and why they are important

- Give advice but do not be prescriptive

Alina and Simona welcomed the comments from the group, noting that they reflect much of what is already in place or being considered and that they found the group's comments to be very affirming.

## **Peer learning topic #2: Tackling Tough Issues**

Ansis Berzins described the nature of his work: director of a community foundation and coordinator of the network in Latvia. He noted that community foundations are supposed to know what is going on in the community and to be able to address the issues they know about, but the reality is they likely do not know the real needs and don't really address the key issues. Still, community foundations like to talk about their successes, but they seldom talk about the nature of that success – was it a one-off, did it really tackle an issue? It is hard for community foundations to challenge themselves. It's hard to raise money for tough issues and to develop long term thinking, both of which are needed if there is to be real success. Community foundations tend to be more opportunistic and less strategic in nature.

Ansis posed the critical question:

Should we challenge ourselves and take risks, especially if we have no money and how do we, as support organizations, support community foundations in challenging themselves?

The group offered the following suggestions (some have been combined)

- There is always a need for a community foundation to balance donor and community needs

- Ask people in the community what they can do and what they think the community foundation can do

  - Think about making grants where governments don't fund

- It is part of the community foundation culture to say we are successful; there is pressure on us to be successful

- We need to be realistic; community foundations can't and shouldn't solve everything, but can think about how they realistically can address change

- One role is to move issues to the public agenda by saying "no one has addressed this xxx"

  - Takes time and talent – can't be confrontational

  - Problems are complex and we are not the only ones to address them

  - Our vision for the future is not the only vision; we don't "represent" community

  - Hard to plan for a changing community

  - We can be a local, neutral convenor

  - Build yourself as a safe place for conversation

  - Be a catalyst

  - Community issues are not short term

  - There is a question of maturity – do you have the credibility yet?

- What is your own capacity to take on tough issues and encourage community foundations to do the same?

- If there is trust among members (of the association/network) they will come forward and perhaps coalesce around an issue (example given: rural isolation)

There is a continuum - some community foundations may be more ready than others

Take the approach of an experiment

Does this kind of question reflect a new stage of development in the field (in Latvia)?

Experience doing something together

Be careful about money that comes to you to solve a problem

Find a foundation that has tried something risky and create a dialogue with them about something practical, what they have learned etc.

Ansis thanked the group for their ideas and noted the discussion had provided him with some good ideas as he thinks about the challenges in his country and the role of community foundations.

**This part of the agenda concluded with observations by Barry Knight:**

These two sessions both raised questions about tough issues. They both took community foundations beyond their comfort zone and they both spoke about risk-taking.

In both Latvia and Romania there are questions and efforts underway in cultures that are unfamiliar with bringing people together, using connections to build connections, creating space for reflection. There are bound to be mistakes made along the way, but the problems and issues are really tough.

Community foundations on their own cannot address the difficult issues but they can create a framework. They need to consider if they are really neutral or if they take a position – local context will determine that.

Community foundations have a foot in the establishment and with also with those who have no power. They are in the “borderland” of the “haves” and “have nots”. The swimathon is great example of how community foundations can bridge the established and non-established; draw them in and enable them.

## **Agenda Part II**

Ana Pinho, who is WINGS Knowledge Management Coordinator, introduced WINGS by saying that peer learning events are one of WINGS’ main offerings, as WINGS places great value on learning from one another. She described regional gatherings, monthly webinars and the newsletter. She also highlighted several reports, including the Global Status Report on community foundations, noting a new report will come out in 2014. WINGS’ interest is in focusing on core philanthropy infrastructure. Ana spoke about WINGSForum being planned for Istanbul from March 27-29, 2014. Ana stressed the WINGSForum goal of making sure members feel like they are part of a global network. Ana spoke about the partnership with the Foundation Centre and the importance of

collecting and sharing data that is now possible, the revamped website, the knowledge centre (300 documents in the library) the goal of WINGS to become a hub for information/knowledge for foundations as well as for support organizations and associations. She noted that English and Spanish are the most common languages.

Ana noted that WINGS may not be able to address every issue that comes up, but can consider how they can be addressed. In addition to what has been described above as concrete offerings (e.g. knowledge centre) WINGS' focus is on forming relationships, being a connector, pointing to resources and looking externally to identify issues.

Jane Humphries, a member of the WINGS Board of Directors, described WINGS membership structure and noted that one of the great values of WINGS is the global connections members have with each other and in the field of philanthropy. WINGSForum is one important way for people to connect as it is difficult otherwise. However, WINGS is no longer able to pay for everyone to participate in WINGSForum or the kinds of activities described by Ana. Members will need to assume some of the costs.

Jane asked participants to describe what it would take to get them to come to WINGSForum.



### **Participant Discussion**

One person suggested that WINGSForum is about content (what can I learn to take home?) and people (what contacts and connections can be made; how can the network be strengthened by this face to face opportunity?)

Another added that it is a chance to think about the longer time horizon and a time to build trust as well as learn.

For others it would be an opportunity to sit at a table (like this one) and benefit from the wisdom of the group

One comment focused on understanding the importance of differing scales and scopes for various WINGS members and that WINGSForum needs to include a focus on community philanthropy. They were assured it would, and that a program planning committee is already hard at work.

Some spoke about the importance of going home with something concrete to build on, while others spoke about the importance of participating in dialogue globally, and then being clear about next steps.

There was little focus on the cost of WINGSForum, and while scholarship support was spoken of by Jane, participants understood that there would be costs. .

In summary, participants appreciate the chance to be around a table with peers and liked the approach in this session. They would welcome case studies to support them in their on the ground work (being preoccupied by day to day demands, including their own sustainability) though also appreciate a focus on issues and ideas (such as at this session which was a mix of practical and philosophical). They will look for more opportunities for dialogue and engagement. As a group they did not know much about WINGS, though some individuals did, and Ana and Jane's remarks were helpful. Participants were encouraged to read the WINGS newsletter, and to keep up on information about WINGSForum.

## **Recommendations to WINGS**

In general, WINGS could encourage community foundation support organizations to be more familiar with WINGS and see it as a resource in their work.

### **WINGSForum**

Ensure that the program for community foundation support organizations at WINGSForum is developed in conversation with that constituency. Reach out to them as a separate group when active promotion of WINGSForum begins (in addition to the overall, more general promotion they will get). Offer a mix of practical and theoretical/philosophical topics. Alternately, consider a day prior to the opening of WINGSForum for community foundation support organizations so they can participate with their philanthropy colleagues in the broad agenda which of course will be relevant to them as it will be to others

### **Global Status Report**

In introducing and encouraging participation in the Global Status Report, ensure there is a good rationale for the benefit it will bring to support organizations and ensure that the report somehow addresses some of the key questions raised by support organizations, such as sustainability. This will not be a change from the past, but it is suggested the promotion and presentation of the report as a resources to the community foundation field be strengthened.

#### Resources and Information:

1. Reach out to community foundation support organizations (separately from other WINGS members) with information about the resources in its library that would be helpful to this group. That only needs to take place once a year, maybe twice. As this is likely still the largest single constituency group in WINGS, this special outreach could be considered appropriate.
2. Promote WINGS more effectively as a connector so when a person in a community foundation support organization has a question, WINGS could be approached not for the answers or advice but to connect that person to a resource or to another person in a WINGS support organization.
3. Invite and encourage the development of case studies and actively promote them. If a simple way to collect and share stories could be found (Global Status Report has a good track record in this and could perhaps be emphasised) and they could be well promoted that might suffice as “case studies”.

#### Peer Learning

1. Plan and offer at least one one-day peer learning event in 2014, perhaps in conjunction with another conference such as the fall conference in the US, a European, Asian or Latin American event, following a pattern similar to the Winnipeg event. A minimum of 6-8 people will be needed to make it a meaningful learning experience.
2. Use time during WINGSForum to plan, with the group that is there, peer learning events for 2015. Include discussion of how they can be implemented, given the financial constraints.

## Conclusion

Community foundation support organizations are hungry for information, learning and networking. Significant experience exists within that network, some of it best suited to regional contexts, but much that would be universal in nature.

WINGS is the only philanthropy institution that knows no geographic boundaries, crosses all aspects of philanthropy infrastructure and is a global resource on many aspects of association and support organization management and leadership. It is not clear that community foundation support organizations appreciate the value that WINGS could offer to them, nor is it fully clear that WINGS, as an organization (individuals within WINGS are an exception) fully appreciate the context of community philanthropy organizations. Notwithstanding the decision made several years ago to wrap community foundation support organizations into the general WINGS programming, it remains important to recognize and respond to some of the unique needs and interests of this constituency if they are to see the value in being part of WINGS.

The peer learning event in Winnipeg confirmed two important realities: 1) colleagues want to learn from each other and WINGS is a vehicle through which that can happen as it was in the learning aspects of the agenda, and 2) community foundation support organizations want to be part of a global network –WINGS – but need to see how it adds value to their work, especially in a time of significant restraint on capacity, including financial capacity.