

# **Global Summit on Community Philanthropy**

## **Background Paper**

### **Introduction**

The purpose of this paper is to develop the agenda for the “Global Summit on Community Philanthropy” to be held either in 2015 or 2016.

This paper has been written following two consultative meetings with community philanthropy practitioners and supporters, one in New Orleans in September 2012 and one in Winnipeg in June 2013.

The paper is intended as the beginnings of a "background paper". The final version of the paper will determine the character the summit meeting itself, but, before the paper can play this role, it needs to go through an iterative process so that it has wide ownership by the field. For this reason, the paper will be used to consult widely about what is planned for the summit and periodically revised to take account of comments received.

### **Background**

The first “global symposium” for community foundations was held in Berlin in 2004. This was widely regarded as a successful meeting, and many people have subsequently suggested that it should be repeated. Although there have been discussions about doing this, and a group of people met in Belfast in March 2009 to discuss the possibility, the idea only began to take shape in September 2012, when a group of people met at the Council on Foundations’ Community Foundation conference in New Orleans.

The New Orleans meeting decided, on balance, that a global summit would add significant value to the development of the field and therefore should go ahead. The group would have liked the meeting to coincide with the celebrations of the Cleveland Foundation centenary in 2014, but for various reasons this is not possible. The decision was to hold the meeting in the global south in 2015 or later.

The Winnipeg meeting affirmed these decisions and developed them further. Participants clarified the goals of the meeting, developed its agenda further, considered who should attend, and began to plan what would happen after the meeting to strengthen the field.

The paper that follows amalgamates the results from the two meetings and sets out proposals based on them.

### **Goals of the summit**

The summit should be part of a process with two main goals:

1. Bonding the field and mutual learning from different approaches across the world
2. Linking the field with key actors to embed community philanthropy into official development assistance and emerging markets philanthropy agendas

## Outcomes

The summit would lead to four main outcomes:

1. A greater sense of awareness of the field as a field
2. Building of links and learning across the world
3. Raised awareness of community philanthropy, particularly among the international development community, corporations, governments, and private foundations (including new private philanthropies in developing and emerging markets countries)
4. A follow up process to ensure that the summit fits into a process to transform the field of community philanthropy from a series of disparate initiatives to a movement with a clear identity, brand, and recognisable attributes that add value to the broader development agenda in a distinctive and measurable way.

## Process

To reach the goals and ensure that the outcomes are obtained, the process leading to the summit, and the follow-up from it, are as important as the summit itself. It is important to conceive the process as one that adds value to the field in a variety of ways, and one that leaves a lasting legacy to justify the investment.

The key components of the process are:

1. **Background paper** to set out framing for the summit. This will be used to stimulate discussion in various parts of the world, refined and improved as time goes on by empirical road testing. The current document is designed as an early draft of this.
2. **Web presence** on the site of the Global Fund for Community Foundations and WINGS to enable key materials to be posted and people from around the world able to offer comments.
3. **Communications strategy** with appropriate professional support
4. **Consultation meetings.** Two of these have been held so far (New Orleans and Winnipeg). If possible, we will cover all main parts of the world. Some will be arranged on coat tails of other meetings. As a general rule, we will continue the practice of asking participants to prepare materials in advance so that they can feed into the research process to build knowledge in the field
5. **Commissioned research** to develop themes emerging out of consultations
6. **Meetings with selected development agency professionals** and others who can advance status and importance of the field. People who attend meetings will volunteer as “ambassadors” to promote the summit and the value of the field to different potential partners

7. **Plenary at COF meeting 2014** on international community philanthropy
8. **Working papers for summit** would include a work plan and resource materials

### **What happens at the summit**

Everyone consulted so far believes that the summit should be a highly creative experience for all who attend. It should not be:

“Just another meeting.”

Participation is the key word with a high degree of ownership of the agenda by people who attend. Among other features of the meeting, there should be:

- Streamed sessions
- Full range of communication technology at the meeting
- Immediate communiqué
- Follow up action plan
- Full report

In order to meet the goals of the meeting there would need to be three main activities at the meeting:

1. Demonstrating good practice in the field. People at the Winnipeg meeting noted:
  - “It will be important to share best practice, celebrate achievements, and note moments of inspiration, and debate current trends and debate visions of the future.”
  - “Share the best practices and connect the donor and best community organizations.”
  - “Learning about success stories, innovations, trends, new challenges.”
2. Opportunities to develop solidarity between members of the field. People noted:
  - “Continued creation of ‘solidarity’ in the field, understanding of the variations in the field, and peer support in all directions. Ways to work together on common issues.”
  - “Provide room for cross learning and creating awareness about what’s happening especially in the global south.”
  - “Participants will be able to network and make friends with peers whom they can discuss and share their ideas with.”
3. Developing working relationships with people outside of the immediate community

philanthropy universe. Comments included:

- “A ‘coming of age’, ‘coming out’ event. Not just for the field itself (so moving beyond the internal/definitional stuff), but also to present itself to other players in a quite intentional way (so a case study/paper session which focuses on experiences with corporates – e.g. extractives - or with bilaterals or NGOs etc. - as well as examples of innovative practice from within the field).”
- “Build evidence of successful community philanthropy, to help influence international donors and others about the need to support bottom-up community philanthropy.”
- “Using the occasion to do some external 'branding' - the fact that such an event even takes place gives it increases visibility and credibility beyond the field/movement Inviting some key players from beyond the movement (development agencies, large foundations, corporations, governments, academics, political scientists, sociologists, economists, anthropologists, statisticians) to draw connections with community philanthropy.”

The first two of these have what one respondent called an "internal lens", while the third involves an "external lens". It is clear from responses that both of these lenses are important. People at the Winnipeg meeting saw these as interdependent. Having bonded at the meeting, people should work together on the follow up, giving priority to the external lens.

### **Follow up from the summit**

In an exercise designed to envisage actions following the Global Summit, Winnipeg participants were unanimous that there should be a vigorous follow up from the Global Summit. Work on this would start now, rather than waiting until the event.

The premise of the follow up would be, as the Winnipeg participants put it:

“To build a movement for community philanthropy to ennoble its actors to negotiate with other parties from a position of power and strength.”

This would enable:

“Sector wide engagement plans with key audiences: corporate wealth advisors, governments, bilateral funders, multilateral agencies, the top ten philanthropists, media, academics, NGOs, and international development actors.”

The result would be:

“The world becomes aware of the impact of ‘invisible’ and ‘hidden’ scale of community philanthropy.”

To achieve these results, the Winnipeg meeting suggested that it would be necessary to develop two inter-related strategies. The first of these is a communications plan and the second an organizing strategy. The communication plan would involve:

- Identification of key audiences
- Branding partners so that the field is recognizable to outsiders
- Empirical evidence of impact of community philanthropy, quantified by finances, assets, and capacity at global, domestic and local levels, and supplemented by good stories
- Work with media to demonstrate the value of community philanthropy

Organizing would involve:

- A group of volunteers from the field to support the initiative
- Champions or “ambassadors” to work engage with different sectors including multilateral, bilateral and country donors, mainstream philanthropy and the corporate sector
- A nominated organization to co-ordinate the work at global level
- Strategy to persuade donors to move beyond short-life project funding to exit strategies that depend on sustainability through local community philanthropy organization

### **Preparing for the summit**

It is evident that in developing this follow up from the summit, preparations on the organization and communication strategy should begin now.

The preparations need to take account of other developments in the field and ensure that the strategies are joined up. This means that the preparations should dovetail with work in the following areas:

- The Global Status Report on Community Foundations 2014
- The Global Alliance for Community Philanthropy
- The Community Foundation Atlas
- The What’s Next Project
- CF Leads work on community engagement
- Vital Signs

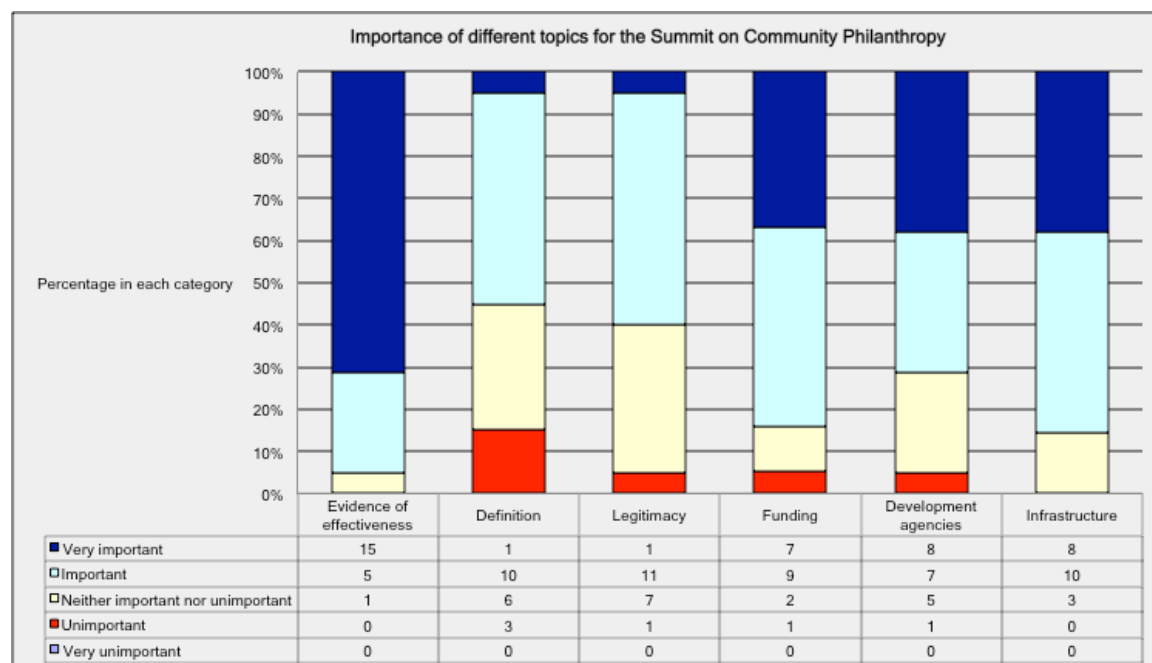
Developments also need also to be synchronized with the day-to-day work of community foundation support organizations, most particularly the Global Fund for Community Foundations.

## Building the capacity of the field in advance of the summit

It is also evident that the communications strategy depends on building the capacity to the field so that it can demonstrate its effectiveness. This is an important area to begin work on straightaway.

So what should we prepare for? A good guide to the answer to this question is provided by a survey of Winnipeg participants, who were asked to rate key issues to consider at the summit. The list of issues was drawn from important issues identified in recent research by WINGS, the process of consultation that led to the formation of the Global Alliance for Community Philanthropy and monitoring and evaluation by the Global Fund for Community Foundations.

A five-point scale from “very important” to “very unimportant” was used. Results are in the following table.



What stands out from all the rest is “evidence of effectiveness”.

The following comments made by Winnipeg participants highlight the importance of the issue:

“Demonstrating our effectiveness, social impact and value for money are important.”

“Evidence continues to be essential.”

“It would help tremendously in convincing donors to support a project if there is evidence of success from other countries.”

“Measuring our effectiveness and impact has always been important and somehow

has stayed in background. It is important to measure our successes and failures - otherwise we always talk about positive examples not presenting actual and objective reality.”

“Evidence of effectiveness can be the most important issue for supporters (current and future).”

“Effectiveness becoming increasingly important - issue is how to measure it in a way that doesn't get us trapped in numbers and short-term results. Wish it wasn't so important to have to discuss, but that's the reality of the world today.”

“I think we need to see and discuss the difference philanthropy is making in the world and get actors in the space to link up with other like-minded actors so we avoid duplication of efforts or lack of synergy with actors working in the same space.”

The least important issue, according to Winnipeg participants, was definition. There was weariness about this issue that appeared to have the effect, according to one participant of:

“...sucking oxygen from the room.”

Another said:

“I am tired of discussions re definition - need to be 'light touch' re parameters of what is and what isn't CP - prefer being inclusive.”

A third commented:

“I think discussing the definition would be a wasted opportunity. It is clear that there are many definitions of community philanthropy - the shared essence is community 'assets' for community 'good'.”

Another was more positive about definition, but felt that the event should not address it directly:

“Definition and legitimacy are part of the mix/landscape but needn't be the focus.”

Another noted:

“Definition is a tricky topic: on one hand, should not talk too much about 'formal issues' rather than topics that aim on development. On the other hand, community philanthropy is growing widely throughout the world and concept is becoming so diverse that sometimes I'm not sure if we are actually talking about the same things.”

The other four issues were not much discussed by respondents in their comments. It is clear that funding is a high priority issue, while the relationship with development agencies and infrastructure important for some.

The overwhelming conclusion is that we need to prepare by developing incontrovertible evidence about the value of community philanthropy.

### **Who should be at the summit**

The meeting should be a mixture of insiders and outsiders.

Insiders should include people from community philanthropies, including those who have not so far been much involved in international events, support organizations and funders of community philanthropy.

Outsiders would include representatives of:

- Development agencies
- Philanthropists not currently involved in funding community philanthropy
- Influential philanthropic advisers

Outreach should be made to high profile individuals who could act as champions for the field:

- Celebrities (e.g. Angelina Jolie)
- Talk show hosts (e.g. John Stewart)
- Businessmen (e.g. Warren Buffett)
- Religious leaders (e.g. the Dalai Lama)
- Journalists (e.g. Thomas Friedman)
- Academics (e.g. Jeffrey Sacks)

This is an indicative list and would require preparation – using people with the necessary contacts and the theory of “six degrees of separation” to sign people up.

### **Conclusion**

This paper has described work in progress towards the Global Summit on Community Philanthropy.

Comments on any aspect of the paper are welcome.

Thoughts are also welcome on issues that need to be considered in developing the process towards the summit, but have not been addressed so far. These include:

- Where it should take place
- When it should take place
- The nature of detailed preparations
- Recruitment of volunteer champions and advocates
- Issues of logistics and organization
- Development of underlying organizational capacity to deliver this
- The necessity for further consultation

Barry Knight (22<sup>nd</sup> July 2013)