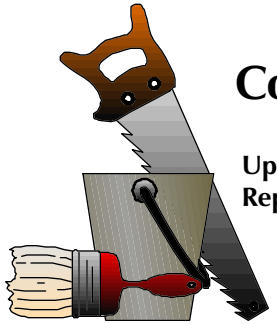
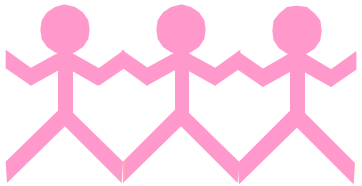
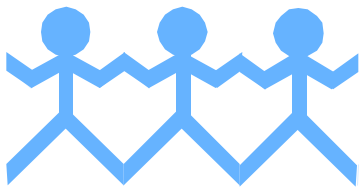


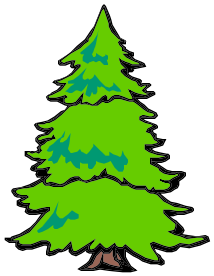
Building the Worldwide Community Foundation Movement

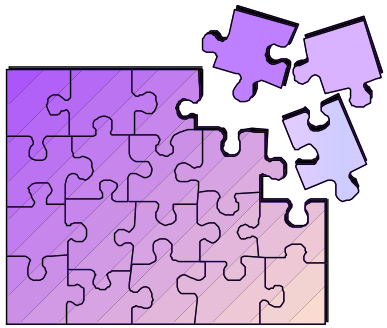
Update: The International Support Organization Network
Report: Growth of Community Foundations Around the World

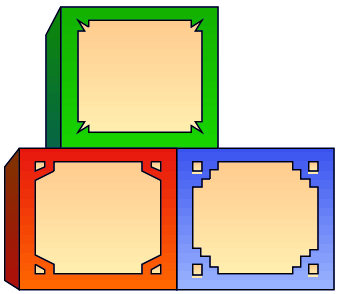
April 2000

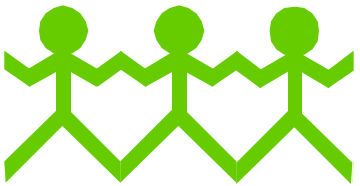












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About the cover:

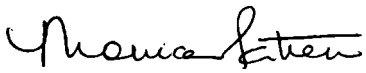
Delegates to the Miami meeting introduced their unique organizations and their dreams by creating pictures from diverse elements: stars, photos, paper-doll cutouts, handprints, glue and more. Gradually, as our movement develops, our diverse organizations are coming together like the pieces of a quilt —each square carefully crafted at home but joined to the others in a larger pattern.

Foreword

In October 1998, thirty-nine people from twelve countries met in Miami Beach, Florida. They represented organizations that support community foundations around the world. The meeting was a wonderful success. Delegates learned from each other, shared their experiences and dreams, and decided to maintain this international support network. The report of the meeting was widely circulated and extraordinarily well-received around the world.

Recently, the Charles Stewart Mott Foundation provided renewed support to update the Miami report. In this document you will find the original report, preceded by new sections describing the establishment of our four international working groups, our merger with the larger WINGS (Worldwide Initiatives for Grantmaker Support) network and the key elements of work ahead of us. The second half of this document is an astonishing new description of the community foundation movement around the world. The "mapping" project—a joint initiative of the Council on Foundations and WINGS—is already helping us move forward in building our international support network.

At our 1998 meeting, a delegate from Bulgaria expressed the hopes of all of us for progress—she said "We all want to turn the sky pink." Our dedicated, young, worldwide network of organizations supporting community foundations, now known as WINGS-CF, has made real progress since then. As we anticipate the 2000 meeting in Canada in May, the sky is indeed a little pinker.



Monica Patten
Community Foundations of Canada
on behalf of the WINGS-CF Advisory Committee
April 2000

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The report can be downloaded from
the CFC website: www.community-fdn.ca
or the WINGS website: www.wingsweb.org

Acknowledgements

This update to the 1998 report was funded by the Charles Stewart Mott Foundation. New WINGS-CF material was written by Nancy F. Johnson (Canada). The mapping report was researched and written by Eleanor W. Sacks (USA). Layout and design is by Wendy Elliott (Canada.)

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Key Steps Forward Since October 1998

Since coming together for the first time as an informal group of diverse geography, language, culture and experience, our support network has made commendable progress. In less than 18 months we have formalized a structure, joined forces under the WINGS umbrella, and developed work plans for the next two years. As our opportunity approaches to meet together again—in May 2000 in Ottawa—our network is on firm ground.

Our Support Network becomes WINGS—Community Foundation Support Network (WINGS-CF)

The idea of bringing support organizations together that work specifically with community foundations grew from discussions at the first IMAG—International Meeting of Associations Serving Grantmakers—in February of 1998. At that meeting in Mexico, 82 people representing 26 countries and 23 associations serving grantmakers came together for the first time. Many of them represented community foundation support organizations and had met previously at the Council on Foundations 1995 meeting for community foundation support organizations. The idea for a support network was born.

Coordinated by CFC (Community Foundations of Canada) and a global planning committee, a meeting for community foundation support organizations was held in Miami in October 1998. (The report of that meeting appears in this book.) There was strong support for continuing this international network.

Because they share so many goals in common, IMAG and the Community Foundation Network began to discuss the advantages of working closely together. Participants in both networks were consulted, and in October 1999 the two groups formally came together under the name WINGS—Worldwide Initiatives for Grantmaker Support. Activities specific to community foundations will be handled by WINGS-CF.

Agreement on How to Structure Our Group

Deciding how to organize a leadership body for our informal international group was not the easiest task! After many discussions and consultations with our global members, an Advisory Committee was created to lead WINGS-CF. It has adopted "Terms of Reference" which outline its purpose, how the committee is structured to represent the network, its operating principles, its responsibilities, its way of operating, and how it is linked to the Working Groups, CFC (Community Foundations of Canada), and the Council on Foundations (USA). The Terms of Reference are available from CFC or WINGS.

Four Working Groups Established

The 1998 meeting in Miami ended with a list of "things to do." Working Groups were established in each of four key areas:

- information
- networking
- research
- technical assistance and training

Each Working Group developed a broad plan, a timetable and a budget. The proposed plans were circulated to all WINGS-CF members and were unanimously endorsed.

The Advisory Committee will function on the same operating principles embodied by the overall network—those of inclusiveness, openness, transparency and mutual respect.

—WINGS-CF Terms of Reference

Advisory Committee members will reflect the organizational, geographic and cultural diversity of the network, including, for example, the perspectives of both established and emerging support organizations and those operating in different regions of the world.

—WINGS-CF Terms of Reference

Working Group Plans Become Part of WINGS Proposal

The activity plans for 2000-2001 developed by the four Working Groups were included in the overall WINGS plan for the next two years. They are described on page 6. These plans will be further refined when WINGS-CF meets in Canada in May.

In November 1999, the Management Committee of the Council on Foundations agreed to continue the WINGS project for 2000 and 2001, and subcontract part of the activities to Community Foundations of Canada (i.e. the Community Foundation Support Network activities.)

1998 Miami Report Updated and Re-circulated

Thanks to support from the Charles Stewart Mott Foundation, this document was produced and circulated widely around the world, both in print and electronically.

Key Directions for the Future

Plans for 2000-2001 will be more fully developed by working groups during the Ottawa meeting in May 2000. Here are the broad directions proposed to date:

- map the scope and potential of the network
  - produce a Directory describing existing and emerging community philanthropy support organizations
  - collect standards, case studies and best practices
  - collect information on existing and potential funders of support organizations
  - map the community foundation movement and support organization network around the world (see the report on page 41).
- provide technical assistance and training
  - develop a pool of experts around the world to deliver on-site consultations and mentoring
  - hold a conference for members in May 2000 in Ottawa
  - offer a travel fund to attend related events
  - create opportunities for peer exchanges at these events
- provide resource materials
  - catalogue existing resource materials
  - develop an indexing system for resource materials
  - create a fund for members to translate or adapt key resource materials
- participate in internships and peer gatherings offered by WINGS
- participate in the WINGS monograph describing support organizations
- participate and develop the website/electronic resources of WINGS

WINGS wants to reflect the breadth of participating organizations, draw on the skills and experiences that are found all around the world, and offer opportunities for new skills to be developed.

— WINGS 2000-2001 Proposal

International Community Foundation Support Organization Meeting Oct. 14-16, 1998 Miami Beach, Florida

A community foundation is "an independent philanthropy organization working in a specific geographic area which, over time, builds up a collection of endowed funds from many donors, provides services to those donors, and makes grants and undertakes community leadership and partnership activities to address a wide variety of needs in its community."
— *Suzanne Feurt*

Background to the 1998 Miami Report

The International Community Foundation Support Organization Meeting was held in Miami Beach, Florida, from October 14-16, 1998. Thirty-nine people attended, representing twelve countries. The meeting brought together representatives from organizations supporting community foundations so they could discuss their organizations' roles, exchange information, gain new ideas and insights, and consider if and how they'd like to stay connected.

The community foundation movement has grown tremendously all over the world in the past few years. So too has the number of organizations providing support to community foundations. Generally, those support organizations (which may be regional or national) offer information, technical assistance and training, and programs to strengthen their members' important local work. They might advocate on behalf of their constituents, promote the community foundation concept to broad audiences, and facilitate links among their constituents. Many support organizations are membership-based. Several count non-community foundations (e.g. private, corporate) among their members.

The U.S.-based Council on Foundations hosted the first gathering of community foundation support organizations in 1995. Informal links among participants were maintained, and a small group emerged in 1998 to plan the second formal meeting. Funding became available from the Charles Stewart Mott Foundation. Community Foundations of Canada agreed to act as the secretariat for planning. At the meeting, support organization representatives were joined by a few colleagues from organizations which support other kinds of foundations, and by some funders who have been particularly engaged with support organizations and community foundations. This report describes the two days participants enjoyed together, and has been shared broadly within the world of support organizations and associations. It describes all the sessions and highlights the key points made in each.

Since the meeting, participants have indicated that they would like to continue actively as part of this new network. Their enthusiasm reflects the growing energy within both the community foundation movement and support organizations, and anticipates a vibrant network committed to strengthening local philanthropy around the world.

Acknowledgements

The opportunity to meet together in Miami was made possible by a grant from the Charles Stewart Mott Foundation, an organization that has provided important support to our movement around the world. The planning committee for the meeting included: Gaynor Humphreys (England), Suzanne Feurt (Belgium), Carol Simonetti (USA), Lynn Helbling Sirinek (USA), and Monica Patten (Canada.) Many participants served as facilitators. Vivian Blair (Mexico) facilitated the closing session. Erika Meyer Rauzin (USA) and Dorothy Reynolds (USA) recorded the sessions. The orginal report was compiled, written and designed by Erica Meyer Rauzin.

Introduction

The vivid paper "quilts" came first, before concerns were refined into words, before meetings became focused on definitions, tasks and future challenges. At the very outset of the conference, moderator Monica Patten (Community Foundations of Canada) and the steering committee offered an unstructured, creative approach to participants' structural, businesslike issues.

Sending participants to an eight-foot table piled with markers, glue sticks, magazines, tubes of glitter, scissors, colorful paper, beads, charms, foil stickers, and bright yarn, Ms. Patten invited them to become artists. She instructed the attendees to form teams to express their organizations' missions through impromptu collages, paper quilts of symbols and images. Like the expressive, sun-lit collage by Max Legodi (Programme Director, Southern African Grantmakers' Association) on the [original] cover, these works of art had many layers of appeal and meaning. When members explained their quilts, the value of the exercise became clear: it allowed people to communicate universally, in symbolic terms. As Marieta Tzvetkova (Bulgarian Association for Regional Development) said, gesturing toward her team's pink poster adorned with stars, "We all want to turn the sky pink."

She was right: as the meeting demonstrated, the support organization representatives, despite their diversity and differences, unanimously shared a deep desire to improve the lives of people in their communities.

The intent of the International Community Foundation Support Organization Meeting was summarized in a quote from an evaluator who studied the Council of Michigan Foundations. What the support organization does well, the evaluator said, "is take the vision of the members and provide the inspiration, opportunity and leadership for growth."

As this pivotal statement suggests, philosophical and practical issues often coincided in the support organizations' deliberations. For instance, participants refused to commit to a practical definition of a community foundation, preferring to keep the term flexible to encourage inclusion and debate as more was learned about community foundations around the world — a philosophical value that dominated the entire meeting.

This diversity and flexibility was seen as a critical element in the long term nurturing and survival of community foundations and their support organizations. However, participants found that they did share certain expectations as to the basic characteristics of a community foundation:

- Providing fiscal responsibility in the investment and management of funds
- Accessibility for grant-seekers and donors
- A defined geographic area (or subject field)
- A range of donors
- A mechanism for addressing local issues and problems, making grants and undertaking community leadership to address a wide variety of critical needs
- An endowment (particularly among established foundations)

While inclusion was the dominant value during the meeting, participants found that cherishing diversification didn't relieve them from grappling with genuine differences in language, cultural traditions, governance, structure, tactics, and the nature and level of philanthropy and civic life in their home communities.

The diversity among members and their organizations also made the meeting rich and useful, particularly since members' similarities outweighed their differences. The strongest mutual agenda was to build the community foundation movement locally, nationally and internationally. As David Bryan (Association of Community Trusts and Foundations) said, "I have an investment in this."

Aware that nurturing this investment will require hard work and patience, members focused carefully on the

What the support organization does well, Michigan's evaluator said, "is take the vision of the members and provide the inspiration, opportunity and leadership for growth."

"You can have your own vision for what you want to see happen locally, but you cannot impose it on the community foundations."
--*Donnell Mersereau*

role and capacity of support organizations. The distinctions they made in the services their support organizations could or should offer depended on their organizations' resource base and on the age, health, vitality and perspective of the community foundations they serve.

Support organization leaders outlined their task in terms of building various working relationships with: community foundations, other philanthropic support organizations, the media, other policy makers, and so on. The bedrock understanding emerged that one size does not fit all, either with support organization or with community foundations.

While the needs participants shared had many individual shadings, their values were far more unified. The values expressed and tacitly agreed upon were that community foundation support organizations:

- Nurture the community foundation movement
- Provide services to member community foundations
- Are inclusive
- Build communities
- Contribute toward a civil society
- Foster reflection as well as action
- Establish sound working relationships
- Promote "best practices" in their field

To get to the heart of support organization issues, participants often found it necessary to discuss the needs, concerns, and issues that affect the development of community foundations. As participants reported candidly on their organizations, it became clear that the ways support organizations approach their work vary between established and emerging organizations, hence the usefulness of having split sessions as well as plenary sessions. Other differences rested on the histories of individual support organizations; on the legal, economic and political contexts in which they operate; on the level of development of the community foundations they serve; and on their constituents' priorities.

As participants considered their missions and capacities, they discussed providing services in several areas:

- Information sharing
- Outreach and marketing
- Financial management training and support
- Staff and board training
- Technical assistance
- Joint programming among community foundations

The key question that emerged was: "How do support organizations best provide services to their constituents? What is the heart of that relationship?"

Everyone had questions in this area. In their quest to assist individual community foundations, participants asked, should support organizations lead or follow? Are they "servant-leaders" or should they lead "from the middle"?

The greatest tension was the balance between meeting the needs of community foundations and coaxing them in the direction their support organizations want them to go. Given that dilemma, how do support organizations know if they are doing a good job? John Richardson (European Foundation Centre) had a slightly jocular answer: "If you keep your members, that's a sum sign things are working."

With that sort of mutual encouragement, participants decided to form a committee to organize future meetings, to continue to share their commonalties and expertise, and to examine more deeply the issues covered at this meeting.

Community Philanthropy & Community Foundations

Summary

Can you serve an entity you can't—or would rather not—define? Yes, you can. At least, that was the consensus at the first plenary session of the Community Foundation Support Organization Meeting. After a discussion of how to define community foundations, covering their functions and characteristics, members decided that elasticity and inclusiveness mattered more than a textbook definition.

Given the different cultural contexts in which participating support organizations function, and the different levels of development of community foundations at the local level, the consensus seemed to be that the definition had to remain fluid. Chair Bill Reese summed up the nature of this message: "Local ownership is the key to everything, context in the culture. No one size fits all, but we all have shared interests."

Narrative

Suzanne Feurt of the European Foundation Centre began by acknowledging that the community foundation field is a growing, dynamic and cutting edge area of philanthropy. The community foundation concept is taking root in dozens of countries while support organizations to assist these foundations are also forming at an increasing rate.

As the community foundation concept spreads, it is being adapted, molded, and shaped to fit different societies. This process of adaptation is necessary and inevitable because tax and regulatory laws, patterns of wealth, philanthropic traditions, political dynamics, and even the nature of the nonprofit sector, all vary in different countries.

This process also is being influenced by developments in the broader field of community philanthropy, where there is ongoing experimentation with other forms of community philanthropy organizations. These include locally coordinated fund drives (e.g., United Way in the US), philanthropic civic clubs, community-based coalitions, and business leagues. These groups also nurture the charitable impulse and serve as vehicles to collect, manage and redistribute private resources for the public good.

This diversity raises some questions: What does it really mean to be a community foundation? Are there essential characteristics common to all so that when the term is used, it means the same thing across national borders?

Ms. Feurt offered a working definition of a community foundation, assembled from literature from the Association of Community Trusts and Foundations (UK), Community Foundations of Canada, The Council on Foundations (US), and the Council of Michigan Foundations. A community foundation is, "an independent philanthropy organization working in a specific geographic area which, over time, builds up a collection of endowed funds from many donors, provides services to those donors, and makes grants and undertakes community leadership and partnership activities to address a wide variety of needs in its service area."

Participants examined this working definition in light of different national contexts and within a four-part framework of:

a. Values — the core principles a community foundation embodies
b. Functions — the various roles a community foundation plays
c. Operations — how a community foundation performs its functions
d. Outcomes — the results or impact of the community foundation' s actions

Ms. Feurt suggested that the core values of a community foundation include neutrality, mutual responsibility,

Community Philanthropy & Community Foundations
First Plenary Session

Chair
Bill Reese
International Youth Foundation

Resource Person:
Suzanne Feurt
European Foundation Centre (EFC), Belgium

Thursday morning

"The debate is not about whether these organizations are good or bad community foundations. It is about basic identity. Must a community foundation have endowment, or is its intent to build endowment enough?"
— *Suzanne Feurt*

Thursday morning

inclusiveness, accessibility and accountability. The common functions of a community foundation include building endowment, being a steward of donated funds, serving donors, making grants and engaging in community leadership. Key operational aspects include developing policies and strategies for internal governance, fundraising, marketing, grantmaking and community relations. Outcomes focus on what has been accomplished and when.

In the international context, Ms. Feurt explained, these four aspects of a community foundation often play out in very different ways. This raises questions about whether, "we should strive for a common definition, or invent new terms that separate classical community foundations from other hybrids or entities that are developing." For example, she asked, how do we deal with:

- Those organizations which are governmentally initiated, supported and staffed, and thus may lack neutrality;
- Those which must use (or feel they must use) all funds to meet immediate needs, and thus build no endowment;
- Those which depend on outside resources for funding, and thus are not based on local contributions, which may be unobtainable or nonexistent;
- Those which focus on one area of concern, such as youth, the environment or community development, and thus don't fit the definition of making grants that serve a broad range of needs.

When the concept of defining community foundations was discussed at length, participants chose to forego a formal definition in order to remain inclusive and elastic. Varying local contexts and developmental issues apparently made it impossible to craft a precise definition that didn't tip the balance toward leaving some organizations out.

Those who would define a community foundation as a politically neutral entity without government involvement did not want to exclude those emerging support organizations or community foundations that depend upon governmental support, both politically and financially. Though they were interested in setting standards, even those participants who felt that grant-making or program initiation define a community foundation's mission, still did not want to exclude newer support organizations whose members don't yet make grants or administer programs.

Mr. Reese explained, "Local ownership is the key to everything. No one size fits all. The community foundation is the natural, logical expression of social responsibility. Citizens participate, giving time, effort and money. That cuts across cultures and that's what binds us together."

The majority opinion on this issue was evident in various comments:

• Michael Seltzer (New School for Social Research): US foundations have lost some ability to collaborate because they are so tightly defined.

• John Richardson (European Foundation Centre): Some European foundations, such as the Wellcome Trust, don't solely make grants, but become operational entities, while others which begin as operational institutions then add grant making.

• Dorothy Reynolds (Mott Foundation): "We find in the United States a whole range of community foundations, some focus a lot of attention on endowment building, while others do very little. It is a virtue that we haven't had real tight definitions. People have been able to call themselves community foundations if they look for broad public input from donors. I'd urge hanging loose."

• Shannon St. John (North Carolina Association of Community Foundations): Openness "allows the entire field to evolve ... as we add different elements to the gene pool in the field of community foundations. These adaptations could very well... move us forward as a field ... and could enrich the model in ... places that have taken a more traditional view."

• Gaynor Humphreys (Association of Community Trusts and Foundations): There is some concern about removing endowment building as a definitional qualifier. "Building endowments is new and difficult for us. It's the hardest bit of our work, but in the UK the most essential."

• Carol Simonetti (Council on Foundations): "I don't think that having defined the core of what a community foundation is by nature says that something that isn't a community foundation isn't good....if we are trying to say what a community foundation is, we should have some of the core things that Suzanne put in her definition. It gets harder and harder, even with some things we get concerned about, like a commercial entity doing some of the things community foundations do, to say 'this is not a community foundation'."

Given some of these reactions, Ms. Feurt said the organizations labeled "community foundations" may share a core set of characteristics. But, she added, "some organizations may have eight of ten, or two of the ten...how many do they have to have to be a community foundation? We are talking about a permeable moving arena. Things look different across national boundaries."

Some members suggested a standard definition of a community foundation might eventually be needed to avoid the situation that now exists in Chattanooga, Tennessee, where two foundations operate, only one of which would fit the traditional model.

People expressed regional concerns about broad community support, possible local corruption, complex variations in how local tax codes treat charities, and the potential of the worldwide community foundation movement.

Bernardino Casadei (Fondazione Cariplo, Milan) cautioned that foundations must distinguish between identity (needing to know who you are) and models (the ways you reach your goals). "The way you reach your mission can change extremely in space and time," he cautioned, "One side could be to focus on identity and the other is to leave flexibility in the way you develop that identity. If you don't have an identity, you have no common goal."

Donnell Mersereau concluded, "Suzanne's profile (of the definition of a community foundation indexed by country) would be very helpful to the field. When you are importing technical assistance persons or hosting an exchange with another country, it is important to have a clear understanding of the cultural differences and of the model for that country. Then you can work together with common understanding, rather than trying to impose one's own model on someone else's country."

Openness "allows the entire field to evolve... as we add different elements to the gene pool in the field of community foundations. These adaptations could very well... move us forward as a field... and could enrich the model in... places that have taken a more traditional view."
— *Shannon St. John*

First Concurent Breakout Session Emerging and New Support Organizations

Chair
Juraj Mesik
Healthy City Foundation — Communty Foundation of Banská Bystrica, Slovak Republic

Resource Persons:

Max Legodi
South African Grantmakers' Association

Helen Monroe
Indiana Donors Alliance, US

Thursday morning

Stimulating the Start-up of New Community Foundations

Summary

Helen Monroe and Max Legodi discussed the elements necessary when initiating a community foundation. Community passion is a prerequisite, but money is not. Identifying the "ready" community is a challenge, particularly where the concept is new, the philanthropic base is slim, and the community's involvement has to be stimulated and educated.

Start-up experiences in South Africa, British Columbia, Italy and other places were discussed, as participants debated the pros (a community foundation can get started) and the cons (the community foundation's focus may be distorted) of having an infusion of initial capital. Local government was seen as a competitor or obstacle in most places, though in some — such as the Czech Republic — government traditionally provides support and continues to do so. Government involvement, local power balances and the need to stabilize new foundations seemed to mandate clear conflict of interest policies, early grantmaking and a "transparent" structure to engender public trust.

Narrative

Helen Monroe summarized the US-based GIFT Program funded by the Lilly Endowment to stimulate the development of community foundations in the US state of Indiana. The program made matching funds available for donations to foundations' permanent endowments and provided some underwriting of initial administrative and grantmaking costs.

GIFT was structured to allow great flexibility in the size of participating communities. As a result, Indiana now has more than 90 community foundations, though mergers have already begun and may increase over time.

Ms. Monroe said a given community's size and wealth do not always determine a community foundation's success. Indeed, citizen commitment and involvement are much more dependable determinants. She explained that engaging residents in the early development of a community foundation is so important that it can even override lack of funds.

Max Legodi (South African Grantmakers Association (SAGA)) discussed the passion for "community" that exists in South Africa, although its population has vast disparities in wealth. South Africans learned of the concept of community foundations through the Mott and Ford Foundations and through US Ambassador, Jim Joseph, former president of the Council on Foundations.

Representatives of SAGA and four nascent community foundations recently traveled to the United States to learn more about community foundations. The visit gave them factual insight into support organizations and community foundations. The visitors also found they were inspired by the passion and zeal they observed among people associated with community foundations.

Seven communities in South Africa have been identified for potential community foundation development, including the four whose representatives came to the US. Mr. Legodi reported that many South Africans believe use of the community foundation concept will unlock wealth, provide community-based vehicles for self-definition and self-determination, and encourage those who are attempting to bridge racial and community differences.

Participants explored the use of technology as a prime tool for support organizations. Even though some communities being assisted still have relatively underdeveloped access to electronic communications, members felt that use of this essential medium can be efficient and effective.

General discussion stressed the legwork necessary to explain the community foundation concept to civic and government leaders, and to potential donors, staff and board members. Participants said it is also essential to conduct careful research and situational analysis to identify communities that are ready for community foundation development. They said future local philanthropy is fostered when a new community foundation succeeds, and when it makes grants early in its development.

A support organization's role in identifying communities where the development of community foundations might be possible includes:

- Conducting careful research on readiness;
- Convening local civic leadership;
- Informing local leaders about the community foundation concept;
- Providing training and technical assistance, either directly or indirectly, to interested parties.

Support organizations can and should help community leaders determine the feasibility of having a community foundation, as well as helping them organize and launch it. In the experience of those present, this assistance has taken many forms, but it consistently reflected the support organization's importance in communicating and adapting expertise and experience gained in other places. Support organizations have used formal and informal training sessions as well as on-site assistance to spread this information.

Many setbacks can happen between identifying a place where a community foundation might be launched successfully and getting one opened. Participants said these rough spots stem primarily from failing to recruit appropriate leadership and from a lack of understanding of the amount of time required to build an endowment. One substantial pitfall occurs when a new community foundation relies too much on a single major funding source, thus reducing its ability to develop the broad donor base that is at the heart of the community foundation movement.

Participants explored the need for a community foundation to be formulated to reflect local needs and culture. They concurred that a community foundation cannot be forced upon a locality. The concept must be embraced and pursued by the residents involved in its planning and implementation.

The support organization is a critical, if sometimes inconspicuous, partner in the development of any community foundation. It carries tremendous responsibility for providing training and technical assistance. At the same time, it must not impose its own values, biases about foundation design, and interpretation of local needs on the local foundation.

The support organization truly becomes a "Servant/Leader," pursuing the difficult role of meeting the needs of the new organization and giving it appropriate information while exercising care that there is true local ownership of the new foundation in the community it will serve.

Even though many participants were very new to the concept of community-based philanthropy and the roles of support organizations, they reacted positively to the notion that the development of community foundations (or like organizations) would greatly enhance the ability of their countries, cities and towns to meet the challenges of the future. They know this is not easy and understand that the pursuit of this goal will vary from country to country and from culture to culture.

The support organization truly becomes a "Servant/Leader," pursuing the difficult role of meeting the needs of the new organization ...while exercising care that there is true local ownership of the new foundation in the community it will serve.

Thursday morning

Second Concurent Breakout Session Emerging and New Support Organizations

Chair
Dr. Andreas Schlüter
Bertelsmann Stiftung, Germany

Resource Persons:

Bernardino Casadei
Fondazione Cariplo, Italy

Jaroslava Stastna
Open Society Fund—Prague, Czech Republic

Thursday morning

Building Capacity to Provide Technical Assistance to New and Emerging Community Foundations

Summary

Bernardino Casadei outlined the capacity of support organizations, including information management, centralized bookkeeping, financial and investment services, on-site consultancies, and board and staff training. He stressed providing information, both in traditional forms and over the Internet.

Jaroslava Stastna of the Czech Republic cited the new Community Partnership Support Initiative (CPSI), which is working in her country to strengthen nonprofits, build philanthropy and share expertise. CPSI has initiated technical assistance, planning and other activities in 15 Czech cities that it believes may be able to support community foundations or other local philanthropy vehicles.

Participants acknowledged that the best kind of technical assistance is skill-specific and tailored to meet an individual community foundation's needs.

Terminology proved a stumbling block sometimes. Ms. Stastna's suggestion that, "Use of a word like 'municipality' is often more appropriate than the word 'community'," caused others to reflect on the meaning and use of words in different cultural contexts.

Narrative

In his presentation, Andreas Schlüter of Germany, explained the role of the Bertelsmann Foundation in initiating a community foundation in Gütersloh and described the efforts of others in Hanover and Dresden.

Jaroslava Stastna noted that the concept of community foundations is new in the Czech Republic. Non-Governmental Organizations (NGOs) are neither plentiful nor well-respected and those that do exist depend on government funding and receive very little private sector support.

The Community Partnership Support Initiative (CPSI) is engaged in community building three major ways:

- Strengthening the roles of NGOs
- Strengthening philanthropy
- Providing shared experience and expertise

CPSI has developed technical assistance plans in the 15 communities where it is pursuing its mission. Training days focus on specifics, such as fundraising. Attendance at these training sessions is required of CPSI project participants, who also receive written resource materials, such as annual reports.

In the general discussion after these presentations, many questions arose about the provision of training and technical assistance. The use of consultants and trainers from abroad was cited as a workable approach for training local trainers. Several commented that professionals in the field of philanthropy or community foundations may not always be the best providers of technical assistance, but that well trained volunteers have often turned out to be the best teachers.

Participants explored the meaning of "community building" and the types of training required to build communities. Ideas about cross-sector cooperation, about why and in what ways communities differ one from another, flew around the group, but did not result in the development of consensus. The very definition of "community" differed widely.

There was agreement that — no matter how the notion of community might be applied — it is clear that needs of communities are varied and that it is essential to conduct careful needs assessments and resource mapping.

The discussion resulted in general agreement that support organizations face many challenges as they initiate and nurture community-based philanthropic

organizations in widely disparate locales. The support organization representatives keenly felt the responsibility involved in knowing that their success or failure in organizing networks, conducting training, coaching local residents, and providing information (through whatever mediums are effective and culturally appropriate) will largely define the degree to which local philanthropy flourishes in their various countries.

They concurred that their skill as support organization professionals will be tested as they learn to think broadly, to acknowledge local customs, to identify agents of change, to recruit key volunteers, and to be inclusive within the context of their individual communities.

Whether or not support organizations should be membership-based was the final issue considered. The group acknowledged the pros and cons of using a membership base, and the caveat that support organizations need to be able to act quickly without needing to rely on cumbersome consensus-building processes.

— Dorothy Reynolds

The support organization representatives keenly felt the responsibility of knowing that their success or failure will largely define the degree to which community-based philanthropy flourishes in their various countries.

Thursday morning

First Concurent Breakout Session Established Support Organizations

Chair
Carol Simonetti
Council on Foundations, US

Resource Person:
Lynn Helbling Sirinek
Donors Forum of Ohio, US

Thursday morning

Providing Quality Technical Assistance to a Diverse Field

Summary

Participants at the first breakout session for established support organizations were very diverse. Each one outlined a major success and a major challenge, illuminating a variety of service-provision issues. The discussion covered many aspects of meeting the challenges of a diverse field, including providing quality technical support. Support organization issues raised included:

(1) How to work with older community foundations, which have larger endowments, while also serving emerging, small, and underfunded ones
(2) How to determine which services community foundations need
(3) How to build collaborations

Narrative

Established support organizations typically provide technical assistance, training and networking services to a diverse constituency throughout a large service area. This session examined communicating and managing relationships with a diversified constituency base, and explored successful examples of technical assistance.

Carol Simonetti (Council on Foundations) opened this "peer exchange on meeting the needs of members' constituent groups." She introduced Lynn Helbling Sirinek (Donors Forum of Ohio) who asked each person to recount their organization's greatest success and greatest challenge in dealing with diversity, although the examples offered dealt with a variety of other issues as well.

For Jenny Kloer (Indiana Donors Alliance), the biggest challenge is the stratification along different levels of maturity of her member community foundations. Her greatest success is, "in spite of being stratified, they work well together ... with a great deal of collaboration. Those who have matured faster are helpful to those coming along."

Donnell Mersereau (Council of Michigan Foundations) cited stratification as an issue, as well as staff and board turnover, which makes continuous training necessary. Her organization addressed this need, in part, by establishing the Community Foundation Academy for New Trustees and Staff, a ten-part distance learning program using video tapes and print material.

Sheila Ross (Commonwealth Community Foundations in Pennsylvania) said that as member community foundations move from infancy to adolescence, her support organization must reinvent itself. "We have to decide what services are needed by our increasingly sophisticated membership, and we have to figure out what to do with community foundations that are not moving ahead."

Her greatest success is a program funded under the will of Benjamin Franklin (a United States founding father) to provide trust funds to endow and support the state's community foundations. Her support organization, "in its early days coalesced around our ability to obtain a portion of the proceeds of Franklin's will and distribute it to community foundations across the state as permanent trust funds.

"We've been able to endow new community foundations, and the attendant public relations is just marvelous."

The legislative lobbying campaign for Franklin money illustrates a key difference between established and emerging support organizations: the campaign succeeded because Ms. Ross could, "turn my board members loose on the legislature. They are power hitters. They play golf with legislators, see them at cocktail parties, and hit them where they live." A new organization may not have board members with such clout.

Diana Haigwood (League of California Community Foundations) cited the successful, collegial connection her members enjoy. Her organization's greatest challenge is its current negotiation with a statewide funder for a grant that could give member foundations programming money totaling $10 to $20 million over the next few years, but that would also, "significantly change the nature of our work."

L' ubica Macedo (Community Association Sami-Sebe Pezinok, Slovakia) said her success is in achieving the local government's assistance in establishing her two-year-old organization, which, "helped us a lot to create trust among citizens for the idea of establishing community foundations."

Monica Patten (Community Foundations of Canada) said the effort to meet the needs of her diverse membership is complicated by widespread geography, different maturation levels among member foundations, and Canada's bilingualism. She added, "Our over-arching success is the production of resource materials, a result of how organizations in this movement are working together. In a way this is an exercise in nation building, a terrific achievement."

Shannon St. John (North Carolina Association of Community Foundations) said the association's greatest challenge is a lack of staff and money. Its biggest success was mobilizing in less than two weeks to stop legislation that had already passed both state houses allowing Blue Cross Blue Shield, a large health insurance company, to convert to "for profit" status with no charitable component. Her board members derailed that effort, forcing Blue Cross Blue Shield to use its non-profit assets to establish an independent foundation with resources of more than one billion dollars.

Bill Reese (International Youth Foundation) said the organization successfully staged a sustainability conference for 15 organizations concerned with child and youth development. The greatest challenge is, "sharing best practices from one country to another," he said, asking, "How will we manage 60 countries rather than 15 in two years?"

Imani Constance Burnett (Southeastern Council of Foundations) said her organization's challenges run from member services to technical assistance. "We (the southeastern states) have 40% of the country's poverty and 11% of the wealth. We have a tremendous research imperative, and stratification. Community foundations pop up every day. We also have a regional capacity building issue." As for successes, she said, "There are miracles every day when the phone rings. Statewide collaborations are raising the bar, but are also raising the vision. We have a dynamic tension about how far do we lead, how do we enable people to walk the talk that they are claiming, rather than depend upon our organization to articulate the next step?"

Suzanne Feurt (European Foundation Centre) discussed the challenge faced by the Community Philanthropy Initiative in dealing with different patterns and traditions of philanthropy in more than 35 countries. "Our challenge as the European Foundation Centre is to figure out what role, what services to provide at a pan-European level. How can we reach common targets and distribute information across borders and languages?"

Gaynor Humphreys said the diversity of the U.K.'s foundations in age and endowment make it, "a challenge to stretch our resources to provide relevant service, and to make all our members feel that they are getting enough." After generating some laughter about foundations in their difficult "teenage" years, she cited particular success with targeted training, such as a session just for chairs of boards of directors, one for larger foundations, and another focused on how foundations work with professional advisors such as lawyers and accountants.

"I think there is a need for people who are very well known in the community to explain the idea to citizens... maybe we need to take some steps that you don't need to do in the United States, but that are necessary in Slovakia to prepare the base for a successful organization."
—L'ubica Macedo

Thursday morning

"Trying to provide leadership for community foundations is like trying to herd cats through a fish market."
—*Carol Simonetti*

"As we face challenges, especially the diversity of our constituency, the big community foundations will value what you do for the smalls. We keep the bigs engaged by involving them in planning, as speakers, and in organizational leadership."
— *Lynn Helbling Sirinek*

Thursday morning

As these reports wrapped up, Ms. Sirinek noted common themes of coping with stratification in the field and building collaborations.

In her presentation, she said the Donors Forum of Ohio has a ten-year history of promoting effective philanthropy but only a short track record of direct service and technical support. It has 128 very diverse members with $2.2 billion in assets, including 66 community foundations. Some are old, rich and well-established, but many are new. Her organization is funded by member dues, conference and event income, and grants for specific projects. The trend is that small community foundations are receiving more services from large ones.

Ms. Sirinek explained, "By providing services to small and medium community foundations, we serve the interests of the large ones. They (want to be) sure the small and medium community foundations practice in good ways. The big community foundations need to hear about the struggles of the little ones...from the field."

She added, "We have some leading thinkers and doers in community foundation development, even though we have had no money (referring to challenge grant programs like the Lilly Endowment Gift program) to spur creation of new community foundations."

Ms. Sirinek cited some specific achievements including:

- A community foundation legal guide for Ohio.
- Brochures defining community foundations that have helped give credibility, especially to smaller community foundations, which can [use it to] show themselves as part of larger movement."
- A series of seminars ("Here's How We Do It At Our Place") where a foundation shows how it raises funds, makes grants, manages its board, etc.
- An annual compilation of data covering community foundation assets, grants, and gifts statewide, with a roster of local community foundation staff and board leaders.
- A successful study trip by community leaders from Poland.
- Improved public information about community foundations.
- Providing numerous smaller community foundations with technical assistance, board facilitation, strategic planning and matching grants for specific growth steps, such as publishing a first annual report.

The Forum focuses on strengthening community foundations and other components of philanthropic life on the theory, Ms. Sirinek said, "that a rising tide lifts all ships."

The Donors Forum of Ohio also works outside of the community foundation field, teaching about philanthropy and working with the media to increase public awareness of philanthropy.

Carol Simonetti cited three ways support organizations have met the needs of members and managed a growing workload: increased use of technology, use of volunteers, and increasing the involvement of member committees in creating work plans.

When Ruth Román asked for a differentiation between member services and technical assistance, Donnell Mersereau said her organization had created a staff memo citing core services and then enumerating "add-on" services to clarify that distinction.

Serving As A Catalyst and Intermediary

Summary

Donnell Mersereau recalled an evaluator's statement about her organization: "What the Council of Michigan Foundations (CMF) does well is take the vision of the members and provide the inspiration, opportunity and leadership for growth." The participants discussed the "servant leader" role this implies and how widely it varies from one support organization to another. The discussion covered several forms a support organization's catalytic work can take, including:

- Initiating collaborative funding projects
- Seeding new community foundations
- Offering specific training
- Reinvigorating dormant community foundations
- Providing extensive technical assistance and information.

Participants discussed ways support organizations can select between being proactive or responsive as circumstances demand, and can maintain consistent awareness of what they do and why they do it. Ms. Mersereau captured a key issue concerning the relationship between a support organization and its member community foundations: "You can have your own vision for what you want to see happen locally, but you cannot impose it on them."

Narrative

Gaynor Humphreys introduced Donnell Mersereau and Michael Seltzer to discuss, "how a support organization can work as a catalyst, but also why we should, and when and how it is appropriate to do so."

At the Council of Michigan Foundations, Ms. Mersereau manages services to 56 community foundations. She directs a challenge grant program focused on building community foundations. "I look at myself as a production manager," she said, "I can follow up behind the visionaries to get things out the door, stay on time lines and make it operational."

The Council is a Regional Association of Grantmakers ("RAG"), with 434 members, including corporations' giving programs and foundations (independent, family, corporate and community). CMF administers a challenge grant initiative funded by the W.K. Kellogg Foundation to develop community foundations to cover the state. The initiative succeeded in that goal. Now the job is to make sure those new community foundations are viable.

When asked if this statewide coverage is sustainable, Ms. Mersereau said CMF established an alliance of local community foundations in one region for mutual support in an area where sustainability was a question. Any member foundation that reaches $10 million in assets can spin off from the alliance. "We made it safe for them to venture out and then come back into fold if necessary. It's not easy. Some smaller community foundations have teamed up for grants on specific projects to achieve shared economies, but it has to come from them."

Like many support organizations, CMF includes CEOs of member foundations on its governing board. For instance, Ms. Mersereau said, "When the challenge grant (to build community foundations) was being designed, we had the major funders and the CEOs" at the table.

Noted Michael Seltzer, "In other places, you'd have to create an ad hoc committee of those people. CMF already had them involved."

"This was an initiative from the bottom up," Ms. Mersereau said. "It was designed by member community foundations. They came to CMF and we became the intermediary and sought funding." The initiative succeeded because of four replicable factors: focus, faith, flexibility and funding.

Second Concurent Breakout Session Established Support Organizations

Chair
Gaynor Humphreys
Association of Community Trusts and Foundations, United Kingdom

Resource Persons:
Donnell Mersereau
Council of Michigan Foundations (CMF), US

Michael Seltzer
New School for Social Research, US

Thursday morning

"The *focus* was our vision that every citizen in Michigan should have access to a community foundation. This had to match the vision of CMF as a regional association of grantmakers, a membership-driven organization. We believe that local communities own their community foundations. This is a basic, vital assumption. They are locally owned, locally donor driven."

The program had a technical assistance component (to build the capacity of community foundations) and a field of interest component (youth). (During the past eight years, the Kellogg-funded youth project has involved more than 3,500 young people in philanthropy as volunteer grantmakers. Youth advisory committees were established at individual community foundations. CMF is now tracking the effect the foundations and the youth advisory committees had on organizations which serve youth.)

In this community foundation-building initiative, the element of faith involved learning how to work together, and how to deal with stratification and diversity.

CMF and the Kellogg Foundation had to be flexible. "We all had to be willing to accept changes and failures, and move ahead," Ms. Mersereau said. "It took member flexibility to see this as a long-term, 10-year project, not as something we could do all at once. The flexibility of the funder was vital to our success."

CMF developed a sense of member ownership by listening to member community foundations through an outside evaluator's surveys and structured interviews. The computer grant and information management software it provided for the field worked beautifully for 32 big community foundations. "Then it blew up on us when we tried to implement the grant with smaller community foundations," Ms. Mersereau said. "We had to invite the smaller community foundations to the table, realize their issues, pull back and regroup. Our design worked for the big ones but not for the little guys.

One part of delivering technical assistance to foundations is helping them ask the right questions of their board of trustees.
— *Donnell Mersereau*

Thursday morning

"We also learned that when CMF brings a program to members, we have to make sure that they understand that they can say 'I vote no'. Now, they don't have to agree to be included to secure future inclusion or to make us feel good."

CMF also learned the vital importance of including a technical assistance component, allowing the support organization to teach skills on different levels of complexity to different audiences, including staff, boards, financial advisors, nonprofits, and the public.

CMF tried different delivery methods for different audiences. In teaching board members the best community foundation practices, so they could understand and support their trained CEOs, the Council conducted a series of one-hour conference calls at 7 p.m. on different evenings, each focused on a specific topic. People could call a toll-free number for a 20-minute presentation, followed by a discussion, a delivery system that met the audience's need.

The Council published issue papers to standardize "best practice" parameters, used mini-grants strategically, retained a lawyer to provide immediate answers to members' legal queries, and employed technology more effectively.

"Our most important staff person now is the information service manager," Ms. Mersereau stated. "The most important thing we do is to get information out to community foundations when they need it, in the format they need. The manager organized the library and resource files, and scanned each document on the computer. I can get what the caller needs on my computer, fax or e-mail it for "just in time" delivery. It took a year and a half to set this up. And, it was expensive" (Kellogg provided one-time funding).

To organize recipient community foundations, the Council created a file classification system and pre-supplied frequently requested data in ring binders.

The second presenter, Michael Seltzer, formerly of the Ford Foundation and now of the New School for Social Research, spoke of Ford's initiative to strengthen and promote philanthropy worldwide.

He said, support organizations acting as catalysts and intermediaries should ask:

- Why are we being asked to do this project? Why have we been enlisted by funders or members in this role?
- What are funders' expectations? How do we factor them into decision making?
- How can we succeed?
- What are the organizational implications of going down this road?

"Many foundations did not start as grant making institutions," he explained. "They created themselves to directly tackle problems, not to give grants to someone else to do something. That was the second generation for many foundations. So the notion of foundations as creators of programs is a continuous trend over the last 100 years. At the same time, foundations find their resources more and more finite in relation to the challenges they face."

The combined assets of all foundations barely equals the amount traded on world money markets daily, "so the dollars are finite, but the goals are not."

Thus grantmakers have turned to "initiative grant making," in which a foundation such as Ford asks, "What is missing? Is there a gap, an opportunity, where we can make a difference?" He said Ford focuses on:

- Worldwide philanthropy;
- Commitment grants to infrastructure organizations;
- Opportunity grants to organizations addressing specific, timely issues

One example of the third kind of grant structure is a *Consumers Union* program dealing with nonprofit hospitals that become for-profit. In this project, Ford gave organizations technical assistance to help them maintain their charitable assets.

Mr. Seltzer presented the accompanying chart (see next page) on "Components of Funders Initiatives".

In the discussion following the presentations, Monica Patten asked, "What is the support organization's role in stirring things up? What is our catalytic role? We've said we are responsive, not proactive, but we are now getting the message from many members to be more proactive."

In Ohio, said Lynn Helbling Sirinek, one large community foundation's proactive effort to involve itself with others started a backlash of independence, and thus, "created a very important role for the supporting organization like us. We're the ones who can talk about alternative styles of affiliation. The smaller community foundations are willing to hear it from us, but not from the larger community foundations."

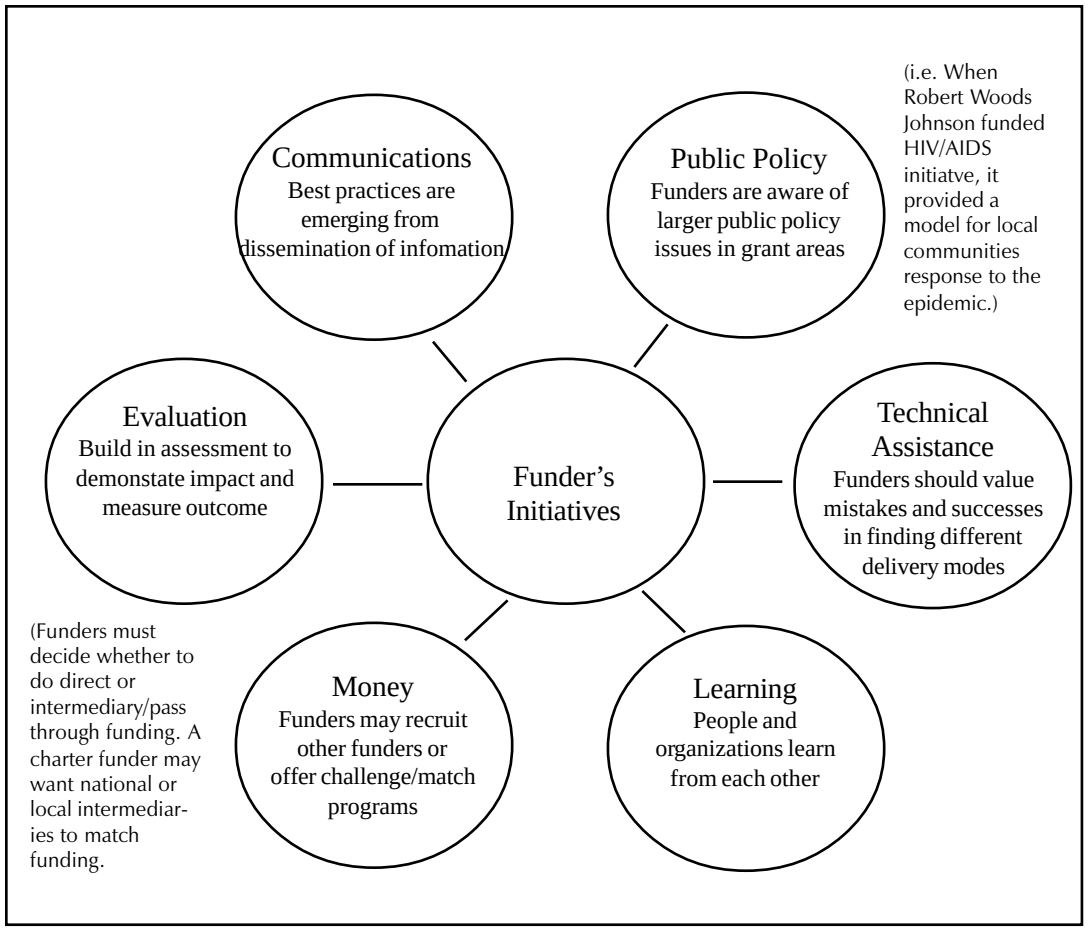
Jenny Kloer finds that natural partnering is happening among community foundations all over the United States. "When the local community takes the initiative," she said, "they can build more of a philanthropic base. In Indiana, that sense of independence is real important. The community foundations are working together now, but if we had tried to force it, that would have caused a backlash."

Ms. Patten noted that in the province of Manitoba, where a private foundation seeded many community foundations, her national support organization had to bring balance to local understanding of the role of a community foundation. The private foundation had inadvertently conveyed that a community foundation's only goal is endowment building — it had omitted mention of grantmaking.

Our organization "focused hard on the core support technical assistance stuff for quite a long time. We work with 50 community foundations, none more than 10-years-old. It's a new concept. We are trying to do a lot of heart and mind changing."
— *Gaynor Humphreys*

Thursday morning

Michael Seltzer's Components of Funders Initiatives



Comments:

- This is a check-list of what funders think about in planning initiatives.
- Consultants may report needs, then funders talk to "stake holders"
- Funders seek credible grantees for whom the project is close to their innate objectives.

The last subject addressed was reinvigorating dormant community foundations, which Elan Garonzik identified as part of the "catalytic function of an intermediary." Gaynor Humphreys said this task begins with, "Getting in early with a new board chair, a new trustee, any turnover. Invite yourself along. Get involved in the appointment of staff. Come in as an advisor to get them thinking differently."

In one strategy for reawakening sleeping community foundations, Ms. Patten said, "I went to some of them and asked them to be pilot sites in certain projects. They saw it as an honor. I was just taking advantage of some opportunities."

Sheila Ross agreed, but added, "You have to disguise what you are doing, so they don't know they are the target."

Ms. Mersereau said her support organization provoked a change in a dysfunctional community foundation by teaching its board, along with several other boards, what to expect from an executive director. "Their executive director was gone in a week. It was a huge "Aha!" for them. Sometimes board members don't know what they are supposed to be doing."

The Role and Value of Support Organizations

Summary

In the second plenary session, over lunch, Elan Garonzik drew upon a rich well of metaphor to discuss the role of support organizations in the guise of hero, friend, confidant, spy, warrior, angel and more, leaving everyone feeling quite encouraged.

During the discussion that followed, John Richardson explained a ground level quantitative way to tell how a support organization is doing: "If you keep your members, that's a sum sign things are working. If you add members, if you are consulted increasingly as an authority, by business, by government, that's a sign things are not going too badly."

He also noted that although the first attempt to launch the European Foundation Centre in 1981 failed, its present success demonstrates, "there is nothing as powerful as an idea whose time has come."

Narrative

Drawing upon his experience in the field, Elan Garonzik (Charles Stewart Mott Foundation) said support organizations are like wise or best friends, trusted advisors, confidants, personal assistants, aide-de-camps, tutors, mentors, intelligence agents, warrior-generals in the trenches, and guardian angels. He said these roles have measurable benefits. As support organizations promote philanthropy, the result is more community foundations and more money for philanthropy. As they act to improve philanthropy, it becomes better, more professional, involving more partners and having more impact in the field.

Mr. Garonzik said support organizations can ease the sense of isolation community foundations feel because they are by themselves in their own municipalities. The support organization lets them reach out to their colleagues and gives them "a sense of kinship".

He related support organizations' practical roles to the tasks involved, including:

- Informer
  (through newsletters, directories, conference reports, web pages)
- Convenor
  (of meetings, seminars, networking opportunities)
- Educator/trainer
  (by teaching or providing access to learning opportunities)
- Monitor
  (by providing alerts and follow-up action on government, business and nonprofit threats to the field)
- Representative
  (by offering a joint voice on key issues)
- Forum provider
  (by offering a focal point for discussion of urgent matters)

In these ways, and more, he said, support organizations lead from in front and from behind. He said they should be visionary, not myopic; politic, not ingenuous; progressive and liberal, not conservative; partner builders, not isolationist; trustworthy, not foolhardy; tireless, not indulgent; nimble, not encumbered; generalists, not specialists; and proactive, not reactive.

At their best, Mr. Garonzik said, support organizations are keepers of the faith, of shared values and trade secrets. In this way, they offer a neutral forum, credibility, the capacity to open doors, and the ability to leverage and to relate up, down and across. They have the expertise and experience community foundations need. This requires moral authority, long term vision, a sense of equity, a people-centered understanding of social context,

Luncheon Address

Chair
John Richardson
European Foundation Centre
Belgium

Speaker:
Elan Garonzik
Charles Stewart Mott Foundation, US

an ability to be 'elite' but unconventional, an expert and committed staff, and lively boards.

He compared support organizations to mythical and heroic figures, from Moses to Hercules to Joan of Arc.

John Binsted (Vancouver Foundation), said each support organization is like a concierge, "helping members get what they need when they need it. You are as good as your membership," because you facilitate their productivity.

Gaynor Humphreys added, "Only we know. We cover so many areas. It is difficult to pull the whole thing together. Even ACTAF's Board doesn't really see the necessary but routine work".

"That's not peculiar to us," Mr. Richardson commented, "that's the truth of the world."

He recalled that the first attempt to launch the European Foundation Centre in 1981 failed. But, he said, "When we made another effort in 1989, it succeeded. There is nothing as powerful as an idea whose time has come."

This network of support organizations is, he said, "an idea whose time has come."

"Support organizations must sometimes be an irritant, enough to create a pearl, but not so much that you are flushed out through the bivalve."
—*John Richardson*

Luncheon Address

New Collaborative Approaches to Community Foundation Growth and Development

Summary

The process of building community foundations as a civic movement encompasses not only infrastructure but also a philosophical approach to philanthropy. In Monica Patten's succinct question, the key issue is: "How do we grow the community foundation movement?"

One approach that appeared in many guises is the creation of various working relationships among community foundations, Regional Associations of Grantmakers (RAGS), and support organizations. Partnerships, collaborations, geographic linkages, project pairings, and mentoring were all cited. Successful links rested on three pillars: appropriate organizational matches, joint goals, and shared values and principles.

Narrative

David Bryan develops community foundations in London. "It's a challenge," he laughed, "or as the Americans would say, an opportunity."

He asked participants to discuss a more coherent approach to local philanthropic development, ways funders can work together, and methods of developing democratic involvement. "Laying claim, ownership, to their locality is key," he said. Participants have to feel, "I have an investment in this, I want to act out a role that says how we will make it work."

Monica Patten, CEO of Community Foundations of Canada, said the young community foundation movement in her country grew from 55 foundations in 1993 to 85 today. Assets doubled, grantmaking multiplied, and the movement gained national visibility.

Because Canada is so large and has a relatively small, scattered population, it is hard to serve and expensive to cover by traveling. Communication is unwieldy. There are three cities of 1,000,000-plus and just a few with more than 100,000 population. While most Canadians live along the US border or within two hours of it, many others live in far flung, isolated small towns. The country is somewhat fragmented, Ms. Patten sid, by self-inflicted unity issues and north/south, east/west, bilingual/bicultural divisions. Yet, each community has a sense of identity and pride which has become heightened as core resource industries (farming, lumbering, mining) have been threatened.

"The community foundation movement is one way to rebuild and re-strengthen community life," she said. Then she articulated a pivotal question that recurred often during the day, "We ask, what is our role in growing this movement? Does it make sense for every small community to have its own community foundation? If not, how can we contribute to each community building its own capacity?

"Armed with research and experience, and a policy that said that Community Foundations of Canada (CFC) will not proactively start community foundations, we had to decide what we were going to do," Ms. Patten said.

To that end, CFC invited one of its members to become its partner in developing collaborative models for expanding the movement. The Hamilton Foundation agreed to undertake the project, including documenting and disseminating research, and developing and sharing a couple of models. CFC would advise, make links, disperse funding, and create a reference group (as it does for every project).

The project proved that relationships are the key to collaborations. Competing communities, one with a community foundation and one without, sat together and began by identifying mutual principles.

Plenary Session

Chair:
David Bryan
London Unit Association of Community Trusts and Foundations (ACTAF), United Kingdom

Presenters:

Sheila Ross
Commonwealth Community Foundations, US

Monica Patten
Community Foundations of Canada

Thursday afternoon

"Using consultants is an intentional part of our sustainability. Because our core projects are covered by dues, when other projects come along we don't want to expand staff. We can use consultants who have been though some of these things. We consider that a goal as a support organization: to know who they are. Our members often contact us for that."
— *Diana Haigwood*

Thursday afternoon

"We knew it would take time," Ms. Patten said, "The town without a foundation didn't want to just have another foundation make grants for them. They started with agreed-upon beliefs, values and principles (i.e., 'working together we can...increase community philanthropy in a way that could not be achieved by working independently'), so they could have a partnership. Then they set up a steering committee, and pursued options for how this could go." Eventually that partnership crafted joint goals, (i.e. 'to be community leaders, catalysts and resources for philanthropy').

Once values and goals were set, the communities agreed on systems for accountability, responsiveness to donors and the local community, and empowerment to cultivate community self reliance. More than anything else, these collaborations required being respectful and patient.

Sheila Ross (Commonwealth Community Foundations) offered a cautionary tale of how her support organization formed in 1989. "Before that, the wife of the governor had been convening the state's 15 or so community foundations for luncheons at the Governor's mansion. They liked meeting together ... and started talking about forming a more permanent thing than lunches. Funds became available from the state government (through oil industry overcharges) on the condition that the funds would be used to work with local communities on energy conservation projects. As a result, the state's community foundations decided to incorporate an association and use the overcharge money for its first statewide project."

After several projects with loaned staff, the group hired Ms. Ross in 1991. Her charge was: "make community foundations available to all the citizens of Pennsylvania, in 67 counties, with 20,000 municipal divisions."

To that end, Commonwealth partnered with the Heinz Endowment and the Pew Charitable Trusts on several projects and held three grantmaker conferences.

"Then, a year ago, I concluded we were not doing this right," Ms. Ross said. "Our board wanted us to be flexible and able to respond to opportunities that came our way, but our members were happy to meet and eat dinner. I finally said, 'Look folks we have a small office, not much staff, we are all over the place with no direction. We have to position ourselves, what we are and where we are going.'"

Now ten years old and strengthened by Benjamin Franklin monies (see First Concurrent Session for Established Organizations), Commonwealth Community Foundations has done the instructive, hard work of creating a concrete identity and a specific action plan. It developed a strategic planning process which led to this resolution: "We will no longer chase the money. We don't care if all we have is dues. We will determine what members want and need, and design projects that give them those things."

Fulfilling members' needs has included sponsoring targeted programs (i.e. planned giving seminars) and "doing things that help the community foundations do what they are best at," Ms. Ross said. "We give them the tools; we've moved our 31 members to a better understanding of themselves and their needs. They look to us to provide technical assistance, to ask what members need before we offer a service, and to provide a resource library, a lawyer on retainer for legal support, legal manuals and materials, and a mentoring program."

The organization learned to simplify, to emphasize regional training, to tailor services to a diverse membership, and to work collaboratively. "We do this with very little staff, hiring outside services and skills. We grapple with the issue of covering territory just because it is there,

including places with bears and trees and not people."

When the issue of intermediary regranting arose, Ms. Patten cited a partnership with the J.W. McConnell Family Foundation, which funds a Community Foundations of Canada national technical assistance program in line with its "priority of supporting Canadians as they manage change in their communities."

Ms. Ross noted, "Municipalities have asked us to form a statewide foundation to house them. I don't think it is good, even if only temporary. There are better ways to deal with statewide granting. You don't want to put yourself in competition with your members."

Dorothy Reynolds from the Mott Foundation concurred, "It is very difficult for a membership-based organization to also be a funder. As long as funding is flowing, everybody is playing kissy face and it's all very nice, but a moment of truth comes at some point..." She cited the Council of Michigan Foundations' massive Kellogg Challenge, saying, "I think they may face some difficult times after this is over in addressing the future and being once again a membership organization and not a funder."

Participants discussed other ways to fund support organization programs and to "pass through" funds. Approaches included charging for materials or conferences (even if some members need mini-grants or subsidies to afford them).

Fee-based services don't work for everyone. Gaynor Humphreys cited small groups with minuscule budgets: "Thirty of our 50 members are very small organizations, seeking to become fully developed community foundations. Many are at the steering committee stage. Some manage pass-through funds and have developed a grantmaking track record, but there is no way we could charge anything like the full cost of service to that sort of constituency." She noted that perhaps larger members could pay higher fees than those currently charged.

John Binsted (Vancouver Foundation), said some of this hinges on "what stage of maturity you are at". His organization, "has a province-wide mandate. We are a vehicle for distributing the wealth of that province across the province and in the process have engendered some 23 other community foundations. In our circumstance, regranting did make sense."

The discussion of regranting segued into an examination of support organization governance. Diana Haigwood said the 20 members of her California support organization form its board, so limited regranting hasn't been a problem. With this method of governance, everyone is part of the decision. "In the future, it could get much less tidy, but it is simple with 20," she said.

Ms. Ross' Pennsylvania group has an executive board made of members and holds an annual full membership meeting. Ms. Humphreys' organization in UK has an elected board, made up of local community foundation representatives. Of them, half are staff members and half are board members. In Canada, Ms. Patten's organization forms participant reference groups on each program.

"That's the way we bring the membership to the table," she explained. "Community foundation people are honored to be invited to be part of a reference committee. We select for geographic diversity, all the balances, and bring people together. This is expensive due to size of our country, but it is absolutely important. Our membership expects that whatever we do, there will be a reference group."

Vivian Blair (Centro Mexicano para la Filantropia) asked about the Canadian organization's relationship with consultants. This had resonance in light of an earlier comment by Michael Seltzer that hiring consultants on capacity-building projects leaves knowledge residing with the consultants, not with the community foundation field infrastructure.

"We are doing things that help the community foundations do what they are best at. We give them the tools; we've moved our 31 members to a better understanding of themselves and their needs."
—*Sheila Ross*

"CFC and its members believe that working together we can each contribute expertise and knowledge that will increase community philanthropy in a way that could not be achieved by working independently of one another."
—*Monica Patten*

Ms. Patten explained, "We use consultants for technical assistance, particularly with our five regional centers, so a local community foundation that is active as a regional centre manages the program. That way it is delivered by people who know and live in that area. We've developed regional teams of consultants — and a set of principles governing those relationships — describing what Community Foundations of Canada will do and what the consultant will do. This helps tailor programs to address specific needs of various provinces and regions. Things look different in Alberta than in the Province of Prince Edward Island. CFC holds orientation sessions for consultants, includes at least one consultant in each reference group, and sends consultants a monthly informational bulletin.

"We also bring the consultants together at least once a year to hear their experiences," Ms. Patten added. "What has gone well, what have they learned?"

The Pennsylvania organization uses members instead of outside consultants. "They are the best," Ms. Ross said, "They give time, they don't charge, and they have on-the-ground experience."

David Bryan, who has worked as a consultant in other fields, said that he often felt isolated and rarely was informed of the outcomes of projects he had helped get underway.

Helen Seidler of the Council on Foundations said using consultants is practical on international projects. She asked Mr. Seltzer and Ruth Román, whether, "The Ford Foundation is putting together a structure to capture some of the learning taking place in Africa around community foundation work? Where is that learning going?"

She also asked how the Europeans share what they learn as they go along.

Ms. Román said a consultant is helping Ford capture lessons learned in initiatives, "across program areas involving community foundations. We're looking at different models and ways we have set up initiatives in terms of our learning and theirs. In Africa, we made a grant so support organizations could come together...and talk about how to support emerging community foundations in Africa."

Practically, Ms. Román said, the decision to use a consultant hinges on what kind of skills are needed for a particular organization's program development. Ms. Patten said she selects among consultants by specific specialties (i.e., asset development, leadership, grantmaking) and thus can tap into a full range of expertise.

Imani Constance Burnett of the Southeastern Council of Foundations said consultants are, "necessary helpers in this dynamic process. We need to import people who can say, yes, this can happen, who can model how things can be actualized."

Marketing and Promoting Community Foundations

Summary

This session addressed the question: How do you get your message out? John Binsted added the first corollary: "What is the most important message you need to get out to advance your cause?" Suzanne Feurt offered a second "chicken and egg" corollary: "To what audience are you directing your message?"

Donnell Mersereau of the Council of Michigan Foundations and Gaynor Humphreys of the Association of Community Trusts and Foundations in the UK offered case histories and responded to participants' questions.

Narrative

To begin, Mr. Binsted asked members the content of their core message. They offered:

- "Trustworthy organizations deserve support." (Jaroslava Stastna)
- "Community foundations should be the choice for donors to local communities." (Gaynor Humphreys)
- "Community foundations are the way to shape the commonwealth without passing through government." (Bernardino Casadei)
- "Community foundations offer an opportunity to givers." (Max Legodi)
- "Community foundations serve as bridge builders between diverse segments of society." (Suzanne Feurt)
- "Community foundations are an operating vehicle for inclusiveness." (Imani Constance Burnett)

All true, said Mr. Binsted, but all are community foundation positioning statements, not messages that sell a product (e.g. the concept of a community foundation).

He also asked: "What is the most critical audience?" Answers included the whole community, donors, citizens, the broad public, the business community, the media, political leaders, public opinion makers; and the answer is: all of the above. Mr. Binsted then asked members to give examples of proven outreach activities.

"To speak about results with all possible means of outreach, you need a multi-layer strategy," said Stanislava Slaninkova, of the Open Society Foundation in the Slovak Republic. "To get the audience informed, the media, the electronic media, events, speakers, you have to do everything. You can do that in a relatively small community of 100,000. You also have to motivate grantees to talk to the media."

Added L'ubica Macedo of the Community Association Sami-Sebe Pezinok, "We have members, city hall employees in various departments who deal with us on various issues, who are aware of problems and they speak about us at community associations. We use volunteers; we ask everyone we meet, and we offer our time to speak with people. We ask them to spread the ideas of community foundations to other people. A newspaper editor created a place for news of community associations. One newsletter offers us space for free. One grantee sent a letter we could publicize and that helped us a lot. It showed the usefulness of our association to our community. It was published in a paper that goes free of charge to every house."

Max Legodi said, "We are taking advantage of the [local] conditions that you have to fulfill to get a license for a community radio station. One condition is that you must seek active community participation. We are using radio to call meetings of community members in different centers. We also plan to structure some talk shows on those community radio stations."

Members enumerated other approaches designed to attract business involvement including face to face presentations (Vivian Blair, of Centro Mexicano para la

Plenary Session

Chair:
John Binsted, Vancouver Foundation, Canada

Presenters:
Donnell Mersereau, Council of Michigan Foundations, US

Gaynor Humphreys, Association of Community Trusts and Foundations, UK

Thursday afternoon

Filantropia) and brown bag breakfasts for business advisors (Mr. Binsted).

Donnell Mersereau offered the case history of an outreach campaign by the Council of Michigan Foundations (CMF), which offers member services to 56 community foundations. CMF also serves as program director of a Kellogg challenge grant to build community foundations.

The campaign was conducted in addition to on-going outreach (newsletters, reports, member meetings, etc.). In launching the campaign, CMF found that members wanted it to spread a consistent statewide message about community foundations, "something no one had approached before."

Thus, the campaign's goals were:

- To brand the name "community foundation" with key target donor groups
- To create recognition of what a community foundation is.
- To develop a common product each community foundation can offer to financial advisors.

Ms. Mersereau said, "The committee realized early on that it is not manageable to talk to every citizen in Michigan." The committee worked with a research firm and ad agency to identify four target audiences: women with hidden wealth (often widows), the blue collar wealthy, entrepreneurs, and upper level executives.

David Bryan asked why target these particular groups? Ms. Mersereau said, "We chose audiences that we felt almost intuitively we weren't reaching very well. We knew there was a lot of wealth in the hands of women."

Focus groups with these audiences showed:

- Few knew what a community foundation is
- Those who knew were already donors
- "Philanthropy" had a negative connotation in the marketplace
- Specific strategies were needed to move donors from annual donations to endowment funds

After extensive strategy discussions, the tag line "You Should See What You Can Do" was developed for ads in print, on radio, and in a generic brochure. Member community foundations were urged to use a common annual appeal letter tied to the state income tax credit.

Ads were donor-focused. They portrayed previous donors discussing their community foundation giving experiences. "We produced ads based on the research, introduced them in test markets and failed in a lot of ways," Ms. Mersereau said. The ads focused on good things community foundations do with grant money.

"For instance, one ad urged endowment giving with the slogan, 'Perhaps your greatest lifetime achievement won't be in your lifetime' ."

Focus groups reported that the donor stories, "resonated well," but the tag line did not. Now, CMF is developing a new tag line and creating ads with broader themes. Ideas under discussion include: "A legacy of caring — your community foundation," "Doing more with your charitable gifts," or "Community Foundations: Connecting people to things they care about."

Ms. Mersereau noted that the physical make-up of the initial ads and brochure worked against their success. The ad type was too small, the newspapers had poor print quality, and the reproduction was bad. In the brochure, the print was too small, the copy was too lengthy, and "it did not resonate well". Where the brochure discussed past philanthropists, "people in focus groups did not like the scary pictures of dead donors. They love Ohio's brochure, with a blue map showing the nearest community foundations.

"We will test this again in high quality magazines," Ms. Mersereau said, "and we may do public television spots. We also learned in focus groups that most of our target audience is technology savvy and would rather make contact through a Web address than a toll free number.

"We realize that what we are promoting is so timely, so important, and such a constructive approach that we are getting a serious hearing."
— *Gaynor Humphreys*

Thursday afternoon

"We're going to try using a WWW site with all the information on Michigan's community foundations, with direct links to local foundations."

The second presenter was Gaynor Humphreys of the United Kingdom's Association of Community Trusts and Foundations (ACTAF), which has grown from 12 community foundations to 22 in five years. By 2008, she said, "Our goal is to have 95 percent of the country covered by community foundations and to make community foundations the choice for support of local charities. This rapid growth is a challenge particularly since we have practically the same level of resources we had five years ago".

Offering "a very tiny piece of our promotional and positioning work," Ms. Humphreys said ACTAF is, "about to embark on a major project with a 'Millennium and Beyond' message, but for this session I will focus down on one particular area, about how we have been relating to government and members of parliament. It's very much work in progress."

ACTAF is a young network with a rapid rate of formation of community foundations. "There are 20-odd up and running. Almost none are really firmly established, though all have some endowment and all are doing regular grant making. Another 30 are on the way, now working somewhere between first steps and almost running."

Factors influencing community foundation development in the UK include the shrinking role of the national government, the newness of the community foundation concept in the UK, and the public's weak understanding of philanthropy, which was once traditional but which lost favor with the growth of the welfare state. "We are not yet sufficiently on the radar screen of opinion formers and potential donors," Ms. Humphreys said.

Governmental relations are first on the agenda. ACTAF worked to refine aspects of its message to highlight its appeal to successive governments and to maintain relationships with key officials. In one significant development, the senior member of the staff of a government department was willing to visit community foundations. ACTAF also has some grant funding from the national government. Government officials approve of ACTAF's meticulous reporting and one government official joined the group's board.

"This means there is someone who has seen our inner workings, seen all the backroom stuff," Ms. Humphreys said. "She's become a tremendously strong advocate for us, very committed. She has helped us get information and access. The minister has started to involve us in some of the government's national programs, including tackling issues of social exclusion in most deprived neighborhoods.

"The key development," Ms. Humphreys said, "is that we are beginning to get a seat at the table. Of course, our goal has become more ambitious as this process has gone on. We are consciously trying to position community foundations and not ACTAF as a national organization. We hope that when government is ready to fund neighborhoods, community foundations will be the local vehicle to use. Meanwhile, we are almost the only network in the UK promoting philanthropy."

Local community foundations are working on outreach to members of Parliament, some of whom are already actively involved in a number of community foundations. She said, "We realized it could be powerful to meet them in a group, to show that what they are involved in locally is part of a bigger picture. We want them to see community foundations as part of the local infrastructure."

ACTAF is working to develop relationships with presently uninvolved Members of Parliament and to build regional relationships in Scotland and Wales.

Promotion is a step by step matter for support organizations, because we are building a bicycle at the same time as we are riding it. We will get the training wheels off sooner or later."
—*John Binsted*

Thursday afternoon

"Give them not too much talk and lots of scones and jam and cups of tea."
— *Gaynor Humphreys*
on seeking support from Members of Parliament

Monica Patten said Community Foundations of Canada had used a series of informational kits in its outeach work. She explained, "The kits include how to start a community foundation, how to govern it, how to raise funds, and how to market and handle communications. We also offer a planning document that helps community foundations conduct their own marketing and community outreach efforts."

In response to Ms. Patten's suggestion that support organizations can help members market themselves better, Michael Seltzer asked if the "market" is softening and if advertising is becoming more important. Ms. Mersereau said marketing is, "branding recognition, creating user-friendly products for financial advisors. It is all a piece of a much bigger picture."

She noted that relationships, particularly with donors, are built over the long term, one on one. In our campaign, she said, "We were asking if you can do a statewide effort to get more recognition for the name 'community foundation' that would tie into efforts with financial advisors and their clients."

Ms. Humphreys said that although ACTAF hasn't advertised, it is "lucky" in that "one journalist for the Financial Times, the most influential paper for our target donors, has enormous enthusiasm for community foundations. Once a year, he puts in a good piece about community foundations. Each time we may only have one response, but it has tended to be from exactly the right person, someone in a good position to help start a new community foundation. "

Future Networking Among Support Organizations

Closing Plenary

Facilitators:
Vivian Blair,
Centro Mexicano para la Filantropia

Monica Patten,
Community Foundations of Canada

Summary

The final session examined whether participants were interested in continuing to network and share information, and, if so, how best to do this.

Several people expressed a personal sense of the group's mission, despite its metaphorical resemblance to "herding cats through a fish market."

They focused on its role as a valuable forum for sharing information and for fostering a sense of togetherness in developing philanthropy through building and supporting community foundations. Future activities were considered and structured through flip charts.

Members named a planning committee to review the meeting report and to serve as a coordinating group for future plans. Participants will be asked to join working groups focused on specific topics.

Narrative

Vivian Blair asked participants to think of ways to connect their missions and communities.

Looking ahead, John Binsted noted, "Now, this is a mutual support network. We don't have a mission beyond that, though we're all doing good stuff. This network is already providing a wonderful delivery system for community empowerment internationally."

He speculated on future partnerships with major funders and with the Council on Foundations, or other well established support organizations.

Helen Seidler (Council on Foundations) said the Council served as the secretariat for the International Meeting of Associations of Grantmakers (IMAG) in Mexico in February, 1998. A number of representatives from community foundation support organizations attended. The Council on Foundations has created an IMAG website, and several other follow-up activities are under consideration.

Bernardino Casadei (Fondazione Cariplo) raised questions about the purpose and scope of an ongoing network. Was it to discuss theoretical issues or tackle practical problems? Was it to encourage bilateral relationships, address regional concerns (e.g. formalizing a community foundation network in Europe), or focus on problems shared by support organizations around the world? He favored pursuing very practical activities (e.g. internship programs) with emphasis given to joint regional and international efforts.

"We've increasingly had the opportunity in Europe to meet and talk...about how to interrelate in Europe," Gaynor Humphreys said. "This meeting is different; it is more about strengthening how we do our jobs and stopping our isolation."

She added, "I felt very lonely in my job. It was wonderful to discover there was someone else in the world, in Canada, for instance, doing the same thing. To me, this was a chance for practical discussion and interaction."

Imani Burnett noted, "How do we extend that sense of togetherness? I would love to have someone come work with me from Asia, Africa or Europe, to have internships or work groups. We should be clear about going forward with that."

Andreas Schlüter and Peter Walkenhorst (Bertelsmann Stiftung) said community foundations are more institutionalized in the US than in Europe, leaving European members with "some things we have to do on our own."

Suzanne Feurt (EFC) said, "The object of evolving discussion in Europe at this point is to develop the capacity of national level support organizations. There is a grand vision of those groups working together with community foundations to create a movement in Europe that commands the attention of Europe's policy makers and its corporate world."

Friday morning

"Always, relationships are important. As a part of business, we need some sense of proximity to others. This gathering achieved that for me."
— *Imani Constance Burnett*

Friday morning

Ms. Patten praised, "how connected those of you in Europe are to each other. The connections within Europe seem closer than within North America. Although we may have had some phone contact, I had never met most of my United States colleagues who are here."

Association Development vs. Building Community Foundations

Ms. Feurt, a planning committee member, asked, "How should we continue networking and move forward?"

She suggested listing categories of activities from which task forces might emerge. The set of flip charts capturing that discussion focuses on ideas on information, technical assistance/training, networking and research. (Chart outline follows.) The action steps indicated specific audiences for networking, information outreach, and shared resources.

One key philosophical issue that emerged from the ensuing conversation was whether support organizations should prioritize developing their own associations or building their member foundations, their constituency base.

Ms. Feurt noted that the two priorities are not mutually exclusive.

"Consider how we support each other as managers of associations, versus how we provide member services," Lynn Sirinek said, suggesting that regional associations of grant makers (RAGS) might provide "models we can learn from". But, asked Michael Seltzer, "Is it our purpose to build sronger associations or to advance stronger community foundations?"

"For me, association development has been missing up to now," Ms. Humphreys said. "That's what this group can do. If we muddle that together with community foundation development, the linkages among association managers will be lost. We should keep the two things distinct."

"Both are valid," John Binsted asserted. "These associations have an element of a common goal to develop philanthropy in their communities. Each association's job is to serve members so they accomplish that goal. Both are valid. One improves philanthropy; the other helps achieve skills for that outcome."

Ms. Burnett agreed, "We are compelled to serve our members, but we neglect the reflective eye that enables us to grow. This reflection is not just self serving; it is important for our evolution." She later added, "We need ways to document mistakes and successes so when we come together again, we don't begin over."

"There are different levels of motivation here," Ms. Blair cautioned. "In Mexico, I want to network with colleagues and organizations confronting the developmental stage, promoting the concept of community foundations throughout out country, but not yet serving a membership.

Building An Information Network

"We are all here for more or less the same goal: is there any part of my job I can do more effectively at a higher level, at an association level?" Mr. Casadei said. "If I want to build up a movement, I have to be straightforward. The more people understand the idea of community foundations, the more we can capture this mood, and give it the practical instruments to become a reality."

For that to become concrete, said Stanislava Slaninkova of Slovakia, "We need much more technical assistance. It is more practical for me to ask ways you can help technically, to ask for more information on how we can support and help our foundations."

Juraj Mesik, also from Slovakia, nodded. "Down on the ground, I can imagine two products," he said. "A good quality, constructive 'Guide to Community Foundations' that individual national branches can amend as needed, would be a wonderful source of information. Do it in national languages, put it on the web. In Europe, we use plenty of languages, so it is more complicated.

"Secondly, this is a forum for a network of networks. There are few forums where Mexicans, Europeans, Canadians have a chance to talk. For now, there is America/ Canada and there is the rest of the world. One simple product we could have is a map to establish the international context. We could get a higher level of knowledge if we are able to link with people. We know what we are going to do in Europe, but — based on such a discussion — we could know who else, America, Mexico, etc. we should involve."

Carol Simonetti said the COF did a recent survey that, "may add a knowledge base" asking community foundations if they were involved in technical assistance and if they made international grants.

Electronic information links were also discussed. Ideas ranged from Mr. Casadei's thoughts about building a list server to Bill Reese's comment that to become a "network of networks" this group had to first know its internal needs.

"A lot of us are involved with CIVICUS (World Alliance for Citizen Participation), and lots of other coalitions. To build a movement, we need other networks," Mr. Reese explained, offering to discuss the support organization gathering at an upcoming CIVICUS meeting in the Philippines. "CIVICUS wants to network worldwide. We've urged them to work with more focused groups, like us."

The members then considered the outlines on the flip charts before coming together for a final wrap up. Ms. Feurt suggested assigning each of the outline's four action areas to a work group.

Philanthropy is more art than science. You are changing the world using the medium of philanthropy. Community foundations think they are the level at which that happens.
—*Gaynor Humphreys*

Friday morning

Wrapping Up

Chair
Gaynor Humphreys, Association of Community Trusts and Foundations, UK

Friday morning

Dorothy Reynolds opened philosophically. "The servant leader role is not all that easy to pull off," she said, "but I think you can find skillful effective ways to be the servant-leader and to help each other do it."

"We are not just supporting a particular group of organizations," Ms. Humphreys acknowledged. "We are trying to change the way our societies think about a complicated bit of the social and economic fabric. We are breaking new ground. That is why it's important to help each other. For most of us, this is a new way of looking of the world. The more we work together on that, the more effective we will be. Anybody can talk about the nature of community. I've given it up. What interests me is how you turn that into practical reality."

In wrapping up, participants considered various cultural approaches to philanthropy. They said that local conditions govern many variables.

For instance, Jorge Villalobos, President of Centro Mexicano para la Filantropia A.C., said differing trends, conditions and traditions of giving in local communities "make it easy or hard to build community foundations".

As the presenter of closing remarks at the final plenary, Gaynor Humphreys extended gratitude to the planning committee and the Mott Foundation, and reflected on what she had learned at the meeting.

Recalling a seven-year-old friend, she said, "Timmy has a question he asks at the end of every day. He says, 'What was your best moment?' I use that at events like this. The highlights for me have been about being in a group that takes itself seriously but not onerously, that cares about concepts like a civil society and social responsibility.

"I loved the creativity around our 'quilts'. I appreciated Suzanne's assist about thinking broadly and setting themes. I loved Elan's list. I loved the energy and enthusiasm, and the general sharing of successes and failures...or challenges, as we learned to call them."

Ms. Humphreys said the conference gave her "time to reflect on how my organization has changed. We started as a servant and established some right to be a leader. We also learned how hard it is. We are still offering member services, but we have moved from simply handling information to being a spokesperson for community foundations and helping members contribute to public policy. The United Kingdom is in the middle between the big established support organizations and the small emerging ones. We got a sense of both groups here."

In terms of the support group organization, she said, "I would like to see us get into a stage when we can be more critical of each other. I think we have all been quite gentle. We need to come to a stage when we can ask, 'Why did you do that?'

"Running an association well is a skill that is certainly hard learned,"Ms. Humphreys said, "and I think that developing and mentoring community foundations is one of the toughest organization development tasks I've ever done. They are particularly difficult organizations to start and they are challenging to run well. On top of that, those of us in countries where this sort of community philanthropy is not very natural yet or very established, found very good reasons for being here. The mentor-network concept is great. I'm old fashioned enough to need to meet people first to communicate comfortably with them electronically. I feel as though my communication with people here will be of a different order from now on."

Apparently voicing a group consensus, Ms. Humphreys concluded, "Everyone here is someone I want to keep in touch with and someone I believe I can learn from."

Planning Outline

A. Target Audiences for Future Networking
   1. Primary target audience: national and regional support organizations and informal networks that provide services to community foundations and similar groups
   2. Secondary target audience: individual members or Constituency groups of the support organizations and informal networks

B. Information Ideas
   1. Data on support organizations and informal networks
      a. Inventory and profiles of support organizations /networks
         1. Develop a template
         2. Collect information
         3. Prepare in hard copy and web page formats
         4. Translate into appropriate languages at the country/ regional level
      b. Staff directory
      c. Key resource people directory
      d. Calendar of events
   2. Resource Materials
      a. Electronic handbook on community foundation development, under preparation by Fondazione Cariplo
      b. Consider forming an international editorial committee
      c. Develop Internet links to other or ganizations resources
      d. List of key resource materials
   3. Documenting and Disseminating Lessons Learned

C. Technical Assistance and Training Ideas
   1. Peer Exchanges
      a. Internships/fellowships
      b. Secondments
      c. Study trips
   2. Training Activities
      a. Mapping of training activities
      b. Conferences and meetings
      c. Training of trainers
   3. Activities of organizations in this network
   4. Activities of other like-minded organizations
   5. Electronic Exchange
      a. Internet Web Site (with links to others)
      b. Listservs
      c. Video conferences
      d. Downloading sample documents

D. Networking Ideas
   1. Mapping of existing links/contacts (meta/multilateral/bilateral relationships)
   2. Listservs
   3. Links to other international networks (e.g., CIVICUS, IMAG)
   4. Secretariat service (who?)

E. Research Ideas
   1. Program development and dissemination
   2. Best practices and failures
   3. Theoretical topics
      a. What is a community foundation?
      b. Community building
      c. Local cultural traditions that nurture philanthropy
      d. Motivating people to give locally
      e. Favorable conditions for building community foundations

(Flip Charts from Friday morning Plenary session)

Friday morning

f. Association management
g. Servant/leader role

4. Potential Partners/Resources
   a. Private foundations
   b. Community foundations
   c. Corporations
   d. International bodies (e.g., World Bank, United Nations)
   e. Governments

F. Next Steps
   1. Planning Committee to prepare a memorandum/ action plan
   2. Summary of session discussion
   3. Outline of potential activities
   4. Resource/staffing issues (including use of potential $10,000 meeting surplus)
   5. Topical working groups
   6. Solicit volunteers
   7. Solicit resources (information, money, etc.)

Participant List

Belgium:
Suzanne Feurt, European Foundation Centre
John Richardson, European Foundation Centre

Bulgaria:
Stoyan Nikolov, Bulgarian Association for Regional Development
Marieta Tzvetkova, Bulgarian Association for Regional Development

Canada:
John Binsted, Vancouver Foundation
Monica Patten, Community Foundations of Canada

Czech Repbulic:
Jaroslava Stastna, Open Society Fund

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Max M. Legodi, Southern African Grantmakers' Association

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David Bryan, Association of Community Trusts and Foundations
Gaynor Humphreys, Association of Community Trusts and Foundations

United States:
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Diana Haigwood, League of California Community Foundations
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Jenny Kloer, Indiana Donors Alliance
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Helen Monroe, Endowment Development Institute
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Helen Seidler, Council on Foundations
Carol Simonetti, Council on Foundations
Lynn Helbling Sirinek, Donors Forum of Ohio
William S. White, Charles Stewart Mott Foundation

Meeting Recorders:
Erica Rauzin
Dorothy Reynolds

International Community Foundation Support Organization Meeting

October 14-16, 1998
Miami, Florida

See Appendix II on page 76 for a current list of community foundation international support organizations, their representatives, and contact information.

The Growth Of Community Foundations Around The World:

An Examination of the Vitality of the Community Foundation Movement

A Note To The Reader

This report on community foundation formation around the world is a joint project of International Programs of the Council on Foundations and the Worldwide Initiative for Grantmaker Support – Community Foundations (WINGS-CF). WINGS-CF is a global network of organizations supporting community foundations and is a component of the larger initiative, WINGS, which addresses the interests of all grantmaking associations. WINGS was formed in the Fall of 1999 by the merger of an earlier network of community foundation support organizations and the International Meeting of Associations of Grantmakers (IMAG). While every effort has been made to provide a full accounting, it should be emphasized that this report is a work in progress. There may be organizations that have been overlooked and/or information that needs updating. WINGS-CF, coordinated by Community Foundations of Canada and guided by a global advisory committee, will continue to track community foundations developments worldwide. We welcome news of any community foundations or community foundation-like organizations that are not included in this report, new ones being formed, or community foundations that are making the transition from civil society, community development or other community philanthropy organizations.

Statement of Inclusiveness

The Council on Foundations was formed to promote responsible and effective philanthropy. This misssion requires a commitment to inclusiveness as a fundamental operating principle and calls for an active and ongoing process which affirms human diversity in its many forms, encompassing but not limited to ethnicity, race, gender, sexual orientation, economic circumstance, disability, and philosophy. We seek diversity in order to ensure that a range of perspectives, opinions, and experiences are recognized and acted upon in achieving the Council's mission. The Council also asks members to make a similar commitment to inclusiveness in order to better enhance their abilities to contribute to the common good of our changing society.

Acknowledgments:

I would like to thank Helen Seidler, former Director of International Programs at the Council on Foundations, and Monica Patten, President & CEO of Community Foundations of Canada, for their sound advice, editorial judgment, and unflagging support. Suzanne Feurt, Coordinator of the Community Philanthropy Initiative of the European Foundation Centre served as an advisor on the project. The "Overview of Community Foundation Developments Around The World" she prepared for the 1999 Fall Conference for Community Foundations in Denver became the starting point for my own research. Her extensive knowledge of the community foundation universe and her wise counsel did much to keep this project on track. Finally, I would like to acknowledge the contributions of the many community foundation practitioners, funders and support organizations around the world, without whose input and advice this report could not have been written.

The Author:

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Introduction

Individuals around the world and throughout time have demonstrated a charitable nature. They give of themselves willingly to promote the well-being of others and the betterment of their communities. Most acts of generosity or charity are done informally, neighbor to neighbor, in times of crisis, or out of a sense of religious duty. The act of giving back to one's community—by volunteering time and talents or by giving goods or money—is called community philanthropy.

While community philanthropy may be informal and immediate in nature, it can also take a more structured form. Individuals can create community philanthropy organizations that work to improve the quality of life in a community by collecting, managing and distributing charitable resources. A community philanthropy organization provides a sustainable longer-term approach to meeting community needs. One of the fastest growing forms of organized community philanthropy today is the community foundation.

Community foundations are not a new phenomenon; the first one was formed in the United States more than 85 years ago. However, in recent years they have experienced tremendous growth as individuals and institutions realize that the community foundation concept, which provides for a permanent pool of charitable funds for a local area, can meet the human needs of a rapidly changing world. In the decade since the destruction of the Berlin Wall and the fall of communism, community foundations have enjoyed increasing popularity and widespread acceptance. Community foundations are being developed in all regions of the world. Even in countries where community foundations were well established prior to 1989, their numbers and assets have increased dramatically.

It seems appropriate that we examine the current state of the community foundation movement worldwide and identify where community foundations and community foundation-like organizations have taken root. In order to understand why community foundations are being formed in so many countries, we will examine the factors that have encouraged their development and the role the support organizations and national and international funders have played in spreading the community foundation concept.

A broad consensus is developing about the usefulness of the community foundation concept. Individuals, support organizations, funders, and, in some cases, governments have taken the lead in developing community foundations in their areas. They come to the concept from varying perspectives. Some may have been involved in civil society organizations that work to increase citizen participation in government and the voluntary sector. Others may have supported community development projects, identifying and finding ways to meet the social and economic needs of communities. Or they may have focused their efforts on community philanthropy, encouraging local giving to meet local needs. What they all have discovered is that to achieve their goals, communities need to develop sustainable resources that will continue to provide support for local initiatives long after outside funders have departed. They realize that local resources, expertise, energy and commitment must be brought into play to ensure the continued vitality of local communities.

To achieve their goals communities need to develop sustainable resources that will continue to provide support for local initiatives long after outside funders have departed.

The community foundation concept has proved to be a flexible and adaptable instrument to meet not just immediate needs, but the changing needs of communities over time. It has shown the ability to adjust to changes at the local level and changes coming from outside forces, including the ups and downs of economic cycles, evolving political, cultural and nonprofit environments, the effects of globalization and the decline of centralized, highly bureaucratized social welfare programs. This simple but

remarkable concept is proving time and again its agility in meeting the needs of the people, societies and communities it serves.

The Community Foundation Concept

Traditional community foundations have a number of characteristics in common. Even so, no two community foundations will be exactly alike. They are shaped by local traditions, history and culture to meet the needs of their local areas. Community foundations may display most but not all of the attributes listed below. They may emphasize one characteristic over another. Even in regions where community foundations have been established the longest, variations in structure and emphasis have developed. The adaptability of the concept makes it possible for each country and local area to mold it to fit its unique circumstances.

Community foundations:

- seek to improve the quality of life in a defined geographic area;
- are independent from control or influence by other organizations, governments or donors;
- are governed by a board of citizens broadly reflective of the communities they serve;
- make grants to other nonprofit groups to address a wide variety of emerging and changing needs in the community;
- seek to build, over time, a collection of endowed funds from a wide range of donors, including local citizens, other nonprofits and businesses;
- provide services tailored to the interests and giving capacity of donors;
- help donors achieve their philanthropic and charitable goals;
- engage in a range of community leadership and partnership activities, serving as catalysts, convenors, collaborators and facilitators to solve problems and develop solutions to important community issues;
- have open and transparent policies and practices concerning all aspects of their operations; and
- are accountable to the community by informing the general public about their purposes, activities, and financial status on a regular basis.

One way to illustrate the differences among traditional community foundations is to use an example in the area of governance. In the United States, in most cases it would be considered inappropriate, or even a conflict of interest, for a sitting government official to be on a community foundation board. Government authorities, such as judges, may be given the power to appoint community foundation board members; but board members are expected to act impartially and in the best interests of the community, not in the political interests of those who appoint them. Community foundations and government bodies do come together to establish public/private partnerships to address local issues, but they do not do it through the board structure. In the United Kingdom, it is common to have local government officials on community foundation boards. No conflict is perceived. Since community foundations and the local authorities are working for the benefit of the community, they believe it is advantageous to include government officials in decisionmaking. In some areas of the United Kingdom, the national government and local authorities have been instrumental in setting up and promoting community foundations, a very unusual practice in the United States. Even though his position is largely honorary, British Prime Minister Tony Blair shows his support for the community foundation movement by serving as vice chair of the County Durham Foundation, his local community foundation.

Today in many parts of the world countries face the challenge of building an infrastructure to provide a supportive context for individual philanthropy where none had existed before.

Given the variations that exist in countries with a long history and experience of community foundations, it should not be surprising that in emerging democracies—where legal, regulatory and banking structures are evolving, local resources are scarce, and varying attitudes towards philanthropy and volunteering exist—the traditional community foundation may be difficult to establish. However, even in these countries, community philanthropy is still a powerful, modernizing force and is leading to the creation of community foundations and community foundation-like hybrids.

Factors Influencing the Dynamic Growth of Community Foundations in the 1990s

Probably the most dramatic worldwide development in the last ten years was the sudden collapse of communism and the need to create new political and social structures in former totalitarian countries. Less dramatic, but no less powerful, has been the turning away from the welfare state in the western democracies and the end of large programs operated by major international funders.

Many western democracies had created centralized, social welfare structures that their citizens relied on to meet their social needs. In an increasingly globalized economy that is turning towards free market capitalism, these states find they can no longer be competitive if they continue to spend large portions of their gross domestic product on social services. At the same time, many countries have concluded that programs designed and run by centralized bureaucracies are not effective in identifying and addressing local needs. These two trends have combined to influence national governments to privatize social programs or turn them over to local agencies.

Increased globalization of the economy has led to a decline in the importance of the nation state. Hand in hand with globalization has come a move to devolve political power to local authorities. The result has been an increase in local decisionmaking and governance based in part on the belief that those closest to the situation will find the most effective solutions to local issues.

The end of the Cold War removed much of the impetus for large governmental foreign aid programs designed to ensure the loyalty of allies in the rivalry between East and West. Foreign aid budgets have been reduced drastically, leaving many poor nations hard-pressed to provide for the needs of their people. These countries need to find new ways to build and sustain resources.

A consensus is emerging worldwide that no one sector can do it alone. Instead, governments, the private sector and nonprofits are realizing that they must work together to solve the persistent needs of their communities. In this new economic and social environment, governments are not responsible for all social services, but may provide a social safety net. The private sector creates employment that allows individuals to earn a living and acquire wealth. It also may support communities through socially responsible corporate giving programs. Nongovernmental organizations (NGOs) and philanthropic organizations cannot effectively run large social programs, but they can identify local needs, marshal local resources and provide a conduit for national and international funding. They also can be incubators for new ideas and approaches to solving community problems.

Community foundations originally developed in North America out of traditions of secular philanthropy and individualism; the political, social and regulatory environment encouraged citizens to come together to create philanthropic organizations. Today, many countries face the challenge of building a new infrastructure to provide support for individual philanthropy. In the former commu-

nist countries, the state actively discouraged, disparaged and even punished private philanthropy. In some parts of Central and Eastern Europe, volunteerism is still considered a bad word, since individuals were forced to "volunteer" their labor in the interests of the state. The non-partisan, non-political nature of community foundations can do much to build the sense of community and, by example, show what philanthropy can be.

Community foundations flourish where there is general support for individual and local philanthropy. The dedicated volunteers who work to create community foundations in their communities are the most important assets community foundations have. An enabling environment in which legislation and tax policy recognizes and rewards charitable giving also can help facilitate new foundation creation. When community foundations, their associations and support organizations can show the ability of community foundations to improve the lives of the community, it becomes possible for them to influence the legal and regulatory climate in which they operate. Community foundations are based on trust. Where climates of trust do not exist, community foundations can help to create them by making their actions and policies open and accessible to the public.

Recent changes to the world's political, economic and social systems have created an opportunity for community foundations to play a leadership role. When communities cannot rely on national or local governments to provide for them, they must rely on themselves to identify the issues that are of the greatest concern and find ways to address them. Community foundations—characterized by their focus on local asset development, local control and local decisionmaking—are uniquely suited to this way of operating. The great interest in establishing community foundations around the world shows how powerful the community foundation concept can be in easing the transition to this new environment.

Spreading the Concept: The Role of Grantmaker Associations and Other Support Organizations

There are several types of organizations that support community foundation development. One broad category is associations of grantmakers. These are membership organizations that typically provide training and educational programs; information resources; and programs to promote, support and spread the concept of organized philanthropy. They may focus on only one type of foundation, such as community foundations, or a particular set of donors, such as corporate foundations and giving programs; or they may have a broader membership base. Grantmaker associations may also form around funding priorities, such as AIDS or children and family issues. In the United States, associations have formed around functional areas such as finance and administration, development and grantmaking. Other types of support organizations may not be membership based, or they may include funding organizations as well as grantmakers.

One of the chief benefits of grantmaker associations and support organizations is the opportunities they provide for foundations to network and share ideas and best practices. Peer learning is one of the most powerful tools community foundations have for developing individual foundations and the field as a whole. The number of grantmaker associations and support organizations around the world has grown dramatically in the last decade, in parallel with the growth of community foundations. The increase has come about as grantmakers realize they can be more effective if they band together. Networking has led to mentoring relationships, with more advanced foundations providing advice and technical assistance to start-ups, and collaborations on issues of common concern. In country after country it can be shown that the

The non-partisan, non-political nature of community foundations can do much to build the sense of community and, by example, show what philanthropy can be.

establishment of grantmaker associations and support organizations has speeded up the course of community foundation development.

National associations and support organizations also play a key role in the public policy debate over the role of foundations in national life, and the regulation of foundations and nonprofit organizations. They do research on philanthropy and the law and promote legislation to create a more supportive regulatory climate for foundations and other nonprofit organizations.

The first support organization for community foundations was formed in the United States in 1949 by a group of community foundations, some 35 years after the first community foundation was established. In the 1960s this organization was renamed the Council on Foundations and opened its membership to all types of grantmakers. It held its first annual conference solely for community foundations in 1985. The first regional association of grantmakers (RAG), the Conference of Southwest Grantmakers, was established in the United States in 1948, one year before the Council on Foundations. Since that time the number of regional associations in the United States has grown to more than 50. A number of these remain informal, meeting a few times a year. However, several of the larger RAGs have specialized divisions within their organizations to provide services tailored for their community foundation members. A handful of state associations just for community foundations have been formed to address common issues that have a regional and statewide focus.

In 1989, the European Foundation Centre (EFC) was established as a membership organization for funders across Europe. EFC's purpose is to represent the interests of its member organizations before national governments and the European Union, convene meetings and facilitate networking, and provide current information to support member programs and initiatives. It launched its Community Philanthropy Initiative (CPI) in 1999 to strengthen and increase organized philanthropy at the local level by building the capacity of community philanthropy organizations. Promoting the formation of community foundations in Europe is one of the primary goals of the initiative.

Several countries have developed national membership associations for community foundations. The Association of Community Trusts and Foundations (ACTAF), soon to be renamed the Community Foundation Network, was founded in the United Kingdom in 1991. Community Foundations of Canada was formed in 1992. Both are active in promoting community foundations and in providing educational programs and other services for their members. They are also active internationally in helping to promote the community foundation concept around the world. A number of other support organizations have established programs to support community foundation development. These include the Academy for the Development of Philanthropy in Poland and the Southern African Grantmakers Association. In Russia the Charities Aid Foundation–Russia has taken a lead role in helping to establish community foundations there.

A recent development is the formation of an international network of associations and support organizations that are active in community foundation development, the Worldwide Initiatives for Grantmaker Support–Community Foundations (WINGS–CF). The first meeting of the network was held in Miami in 1998. Its second meeting will take place in Ottawa in May 2000.

One of the chief benefits of grantmaker associations and support organizations is the opportunities they provide for foundations to network and share ideas and best practices.

Spreading the Concept: The Role of Funders

National and international funders have become a powerful force in spreading the community foundation concept. Without their support, it is certain that the community foundation movement would not have traveled as far and as fast as it has in the last several decades.

Community foundation funders take many forms. Private foundations have played the largest role; but national governments, government entities and local authorities—and even a few corporations—have seen the benefit of sustained funding for social and economic needs that community foundations provide.

Funders bring a number of resources to bear in promoting community foundations. The first is the validation of the concept. When funders become interested in an idea and promote it, individuals, the private sector, policymakers and other funders take notice. Funders provide expertise, in the form of staff or consultants, to help form new community foundations, especially in areas where they are not well established. They create opportunities for learning about the concept by funding study tours and setting up meetings where individuals learn what a community foundation is, how it functions and the impact it has had in other communities. They provide networking opportunities for established community foundations. Finally, the financial resources they provide help to create new community foundations and strengthen existing ones.

Funders have devised a number of programs to encourage the development of community foundations. The most common are: grants to individual foundations for start-up and technical assistance, challenge grants to build endowment, and grants for specific programs and initiatives. It is not the monetary resources alone that benefit community foundations. Support from a major funder can raise a foundation's profile and the level of trust it enjoys with other potential donors, grantees and the community at large.

A complementary strategy has been funding for associations of grantmakers and other organizations interested in promoting the community foundation concept. A multiplying effect takes place when funders support associations and organizations that provide networking and peer exchange.

The Charles Stewart Mott Foundation was the earliest international foundation to recognize the potential of the community foundation concept. It began supporting individual community foundations in the United States with challenge grants in the late 1970s, and then expanded its programs to provide support for technical assistance programs through the Council on Foundations. In the late 1980s, it began promoting the model internationally. From funding programs to accelerate the start-up and effectiveness of new community foundations, Mott moved up to developing programmatic areas for community foundations, such as the neighborhood small grants program. Mott also recognized that making grants to grantmaker associations and support organizations was an effective way to spread the concept and began funding those as well. Many other national and international funders have realized the power of the community foundation concept and support community foundation development through their programs to promote philanthropy and volunteerism. Other major international funders include the Ford Foundation, the Soros Foundation Network of Open Society Funds, John D. and Catherine T. MacArthur Foundation, W.K. Kellogg Foundation, the Rockefeller Foundation, Charities Aid Foundation and its affiliates, and Bertelsmann Foundation. The

Support from a major funder can raise a foundation's profile and the level of trust it enjoys with other potential donors, grantees and the community at large.

Synergos Institute, an organization which provides technical assistance to start new community foundations, has also been heavily involved in promoting the community foundation concept around the world.

We turn our attention now to the community foundations themselves. The worldwide tour that follows is designed to place the creation of community foundations in context. Some of the organizations described below will not take the form of traditional community foundations, falling instead into a hybrid category of community foundation-like organizations. They may evolve in the future into a more traditional form of community foundation, or they may stay as they are. These community foundations and community foundation-like organizations illuminate the creative ways local individuals and funders have found to promote philanthropy in their communities.

This overview reflects a moment in time and is very much a work in progress. Names of community foundations and hybrid organizations will be added or subtracted as more information becomes available.

Community Foundation Formation Around the World: A Regional History Tour

I. The Americas

United States

It seems appropriate to begin where it all began, in 1914 with the formation of the first community foundation, The Cleveland Foundation, in Cleveland, Ohio. Frederick H. Goff, a local banker, had the deceptively simple idea to consolidate a number of trusts into a single organization that would exist in perpetuity and be governed by a board of local citizens. The trust assets would continue to be managed by the banks, but the citizen board would assess the needs of the local community and make grants to community organizations to meet the needs in that local region. This new philanthropic model would not only relieve local trust banks of the burden of grantmaking, but would make certain that the changing needs of the community would be served into the future, even if the original purpose of the trust was no longer needed. The model he developed came out of the Progressive Movement in the United States, which promoted the secularization of philanthropy and saw a need for professional, businesslike management practices in government and in charitable endeavors. It is not coincidental that community foundations arose at the same time as the first large private foundations were being formed.

There was a boom in community foundation formation in the 1920s as the concept spread, especially in the Midwest and Northeast. Community foundations faced a difficult period of decline during the Great Depression of the 1930s, when resources were scarce and the banking system was in difficulty and disrepute. The number of community foundations once again began to rise after World War II. When the movement revived in the late 1940s and 1950s, founders often opted for the charitable corporate form of community foundation organization rather than the bank trust form. Corporate form foundations are characterized by self-perpetuating boards and the authority to make investment decisions themselves.

Foundations in this period, especially private foundations, came increasingly under attack for the perception that they abused their tax-exempt status. The result in the late 1960s was a sweeping change in tax legislation to combat the perceived abuses. The reforms instituted by the Tax Reform Act of 1969 included a redefinition of the types of foundations according to their tax-exempt status, more government oversight of foundations, and restrictions placed on private foundation operations. As part of these reforms, community foundations received a favored tax status as public charities.

The effects of the Tax Reform Act of 1969 point to the importance of enabling legislation in encouraging community foundation creation. The current acceleration in the number of community foundations formed in the United States began in the 1970s as the regulations of the 1969 Tax Reform act were promulgated. The advantages of public charities over private foundations include greater deductibility of gifts, exemption from taxes and looser government regulation. The number of new community foundations being formed rose, even as the number of new private foundations leveled off. Private foundations did not recover their momentum until the late 1980s.

The upward trend in community foundations was enhanced further as the recession of the early 1980s put national social programs at risk. During the Reagan presidency, government began turning away from large-scale national social programs, a trend that has continued into the 1990s and shows no signs of being reversed. Individu-

North America

United States
Canada
Mexico

als and private foundations began looking to community foundations as a way to make up for the loss of national funding for local social programs. The economic boom years of the 1990s further enhanced the growth of community foundations. As the pool of disposable income increased, community foundations benefited from the desire of individuals to give back to their communities and take advantage of the tax benefits of charitable giving.

The movement has reached a level of maturity in terms of fiscal management and the professionalization of community foundation staffs. Most parts of the United States have access to a community foundation, and there is an emerging trend toward community foundation mergers in smaller markets and the creation of area or affiliate funds to take advantage of economies of scale. An area or affiliate fund covers a specific geographical area and operates as a donor-advised fund of another, usually larger, community foundation in its region. The assets of the area or affiliate fund are managed by the lead community foundation to achieve lower administrative costs. Typically, the affiliated fund has its own board that recommends decisions on grantmaking to the lead foundation.

There are several reasons for the continued expansion of community foundations in the United States. First is the concern about the continuing decline of state social welfare programs and the ability of governments, even at the local level, to meet social needs. Second is the devolution of power to state and local governments and the resistance to taxation as a means to provide social services at any level. Third is the large increase in wealth caused by a vigorous economy and the transfer of wealth from the World War II generation to their heirs, which has left many living donors with large amounts of disposable assets.

The tremendous asset growth in the last two decades has resulted also from the structural changes community foundations have made to attract living donors through donor-advised giving programs. Donor-advised programs allow living donors, who can be individuals as well as corporations, to make donations to their community foundations and get an immediate tax deduction. They also allow donors more direct participation in their philanthropy, which donors value. Donors are given the opportunity to recommend the dollar amount of donations and the charitable organizations to whom they should be sent. The donor-advised aspect of the community foundation model has become so popular with donors that it has spread to other types of nonprofits such as religious denominations, ethnic organizations and universities, and is being replicated by commercial entities that encourage charitable giving while continuing to manage the charitable assets.

Facts: There are nearly 600 community foundations in the United States today, which at the end of 1998 held more than $25.2 billion in assets, up almost 19 percent from the year before. Gifts in 1998 exceeded $2.8 billion, a nearly 17 percent growth, and grants exceeded $1.5 billion, up nearly 23 percent.

Resources: Because it had a head start, the United States is home to numerous grantmaker associations and support organizations, including the national Council on Foundations. The Council's Community Foundation Services group focuses on the needs of its members. The international interests of U.S. community foundations are served through its International Programs group. Approximately 60 people attended the Council's first annual conference for community foundations, held in Boston in 1985. In the fall of 1999, at the 15th conference, the number attending had grown to more than 1200.

There are also regional and statewide associations of grantmakers (RAGs) that provide information, educational opportunities such as conferences and meetings, and

opportunities for networking and sharing of best practices. A number of the statewide RAGs have programs for community foundations. These include the Council of Michigan Foundations, the Donors Forum of Ohio and the Indiana Donors Alliance. Statewide associations for community foundations exist in Pennsylvania, California, North Carolina and Florida.

The United States is home to a large number of national funders that have recognized the agility and flexibility of the community foundation concept. National funders that are currently active in the United States include the Charles Stewart Mott Foundation, Lilly Endowment, Ford Foundation, W.K. Kellogg Foundation, David and Lucile Packard Foundation, the Rockefeller Foundation, the John S. and James L. Knight Foundation and the James Irvine Foundation.

Canada

The community foundation concept traveled across the Great Lakes into Canada very soon after it was developed in the United States. The first Canadian community foundation was the Winnipeg Foundation, formed in 1921—only seven years after the Cleveland Foundation, on which it was modeled. Community foundations in Canada continued a slow but steady growth from their beginnings into the latter part of the 1970s, when the movement began to gain momentum. In the last decade, the growth in the number of community foundations in Canada can be described as explosive. This is due to a number of developments. The model itself has proved attractive in the Canadian context as the country tries to find alternatives to state funding for social welfare programs. National and international funders have promoted the concept and supported individual foundations. Community Foundations of Canada, a national support organization devoted solely to community foundations, was created and is very effective in promoting the community foundation concept. The federal and provincial governments also have been supportive, recognizing the utility of community foundations in meeting local needs as centralized programs decline.

Facts: Canada currently has nearly 100 community foundations. Community foundations exist in all Canadian provinces and in the Northwest Territories. To put the recent growth into perspective, seven of the community foundations now in existence were formed from 1921 through the 1960s; 10 community foundations were formed in the 1970s; 18 in the 1980s; and 55 plus in the 1990s. Today, there are more community foundations per capita in Canada than in the United States. Canada has approximately one community foundation for every 313,000 people, whereas the United States has one for every 492,000 people. In 1998, assets held by Canadian community foundations exceeded $1 billion (about $690 million U.S.*) by year's end and $50 million ($34.5 million U.S.) in grants were made. The Vancouver Foundation, formed in 1943, has more than $550 million ($380 million U.S.) and is one of the largest community foundations in North America. It has also been involved in mentoring a community foundation in Mexico. Canadian tax law encourages donations to nonprofit organizations through tax deductions, but does not accord to community foundations the special status that exists in the U.S. tax code.

Resources: Many funders have been active in supporting the community foundation movement in Canada. These include from Canada: the J.W. McConnell Family Foundation, Walter and Duncan Gordon Foundation, the Lawson Foundation, Thomas Sill Foundation and the T.R. Meighen Foundation, as well as the national government and the U.S.-based Charles Stewart Mott Foundation. The

* Currency conversions, where noted, are given in U.S. dollars based on rates in effect on February 29, 2000.

membership association for community foundations, Community Foundations of Canada (CFC), was established in 1992 and plays an important role in encouraging the development of both established and emerging community foundations through information, technical assistance, training and networking. In 1998, more than 300 community foundation representatives attended the Community Foundations of Canada national conference. In addition, CFC has taken a leadership role in forming worldwide international networks and organizations supporting grantmakers.

Mexico

The concept of philanthropy is undergoing a transition in Mexico as individuals and nonprofits begin to create local resources for local problem solving.

Traditions of philanthropy in Mexico, as in other Latin countries, have been associated primarily with religious charity and with the benevolence of elites. That is, philanthropy is seen primarily as a matter for the churches and the ruling classes. By and large, the public has viewed philanthropy as a way for the elites to maintain social control, and individual philanthropists have used their giving to obtain prestige and social status rather than to make a difference in the lives of the people.

Following the thinking of other western countries, Mexico in the nineteenth century created a social welfare state. Today, however, Mexico is turning away from the state-centered model and is privatizing businesses and the delivery of social services. Local populations must rely increasingly on their own initiative to meet their social needs. The concept of philanthropy is undergoing a transition in Mexico as individuals and nonprofits begin to create local resources for solving local problems.

There are about 20 community philanthropy organizations in Mexico, with more under development. The country has become a laboratory for creativity in the formation and structure of organizations designed to meet community needs. Some are organized in a more traditional community foundation form, while others are hybrid organizations. Community foundations or foundation-like organizations exist in the cities and regions of Oaxaca, León, Morelos, Bajío, Celaya, Cozumel, Puebla, Córdoba, Chihuahua, Guanajuato, Irapuato and others.

One of the newest community foundations, Fundación León, was formed in October 1999 after several years of planning. León is a wealthy city with an economy based on ranching, leather tanning and footwear manufacturing. Yet it also has a great need for programs and services for the young, the poor, the aging and the disabled. It is difficult for those with means to give to people in need, other than through direct handouts, because of the poorly developed nonprofit sector. The community foundation model is attractive because it is an effective vehicle for individuals to collectively meet community needs and, most importantly, it gives donors confidence that their money will be managed and used effectively. The founding board members decided not to look for money from government or from outside the community until they had succeeded in raising money locally. It is important to them that the foundation be independent from outside influences. They also want to build the community foundation as a focus for local philanthropy first, so that the community has a clear understanding of what a community foundation is and does.

At the other end of the spectrum, the Fundación Comunitaria Oaxaca was developed out of the idea of an American foundation president who was interested in promoting a more pluralistic, harmonious society in Mexico after the Chiapas uprising in 1994. She felt that establishing a community foundation in southern Mexico would be an effective way to do that. Oaxaca, which is the country's second poorest state, was chosen as the site.

Other U.S.-based foundations, Mexican corporations and prominent local businessmen were enlisted to do the initial planning. If a local community foundation could be established, there was the promise of substantial grants from national businesses, as well as from some of the largest international foundations. The foundation was established in 1996. Several devastating hurricanes in the region helped spur the creation of the Fundación Comunitaria Oaxaca so that it could channel disaster relief aid from donors within Mexico and abroad. In 1998 approximately half the donations to the foundation came from Mexican sources, for the most part outside of Oaxaca, and half came from international funders. The foundation's grants program focuses on children and youth, women, and micro-regions. It continues to seek and receive grants from international funders.

An interesting hybrid organization exists in the state of Chihuahua, where a group of businessmen established the Fundación del Empresariado Chihuahuense in response to another natural disaster. They were able to have legislation passed that imposed a payroll tax on their businesses. The government collected the tax; the proceeds were turned over to a foundation the businessmen created that made grants to meet the emergency. After the initial crisis passed, they decided to continue their work in the community and had the enabling legislation renewed.

Resources: In addition to local individuals and corporations, community foundations in Mexico have received international support from the Ford, Kellogg, MacArthur, Rockefeller and International Youth foundations. The Mexican Center for Philanthropy (Centro Mexicano para la Filantropia, or CEMEFI) was formed in 1988 to promote the culture of philanthropy in Mexico. It has held four workshops for Mexican community foundations in partnership with the Synergos Institute.

Anguilla, B.W.I.

The Anguilla Community Foundation was formed in Anguilla, British West Indies, in May 1999. Due to the poverty on the island and its reliance on tourism, the primary focus for the foundation is on community development and the environment. The community foundation was formed by a local steering committee headed up by a former U.S. community foundation executive who now lives on the island. It also received technical assistance from the Southeastern Council of Foundations, a U.S. regional association of grantmakers that includes Caribbean community foundations in its membership.

Puerto Rico

Puerto Rico has a population of 3.5 million people and a per capita income only one-third that of the United States. It is linked to the United States through its commonwealth status, which gives it autonomy in local governance and makes its inhabitants eligible for the benefits of U.S. citizenship. The island's deep poverty encourages many of its most enterprising citizens to leave the island and move to the U.S. mainland to seek opportunity and employment.

The Puerto Rico Community Foundation (PRCF) was formed in 1985 to provide a focus for philanthropy on the island. Until then, the island had received little support from mainland foundations or the business community. In particular, it was felt that the corporations, which had established manufacturing plants on the island under a U.S. government program that eliminated business taxes, were not contributing their fair share. The Ford Foundation realized that a community foundation could be an asset for the island. In 1985, it commissioned a feasibility study to identify the prospects for developing a commu-

nity foundation there. The study recommended a two-part development strategy. The first step was the establishment of a high quality, professionally managed philanthropic organization, the PRCF, with backing from large foundations on the mainland. Once that had been accomplished, the PRCF would be able to approach the business community and provide them with a way to give back to the island.

The PRCF decided it would achieve high impact and high visibility by immediately undertaking a large grantmaking program that would make it known throughout the island. The PRCF began with a total of $4 million in grants from the Ford, Rockefeller, Mott and MacArthur foundations and the Carnegie Corporation, in addition to donations from 11 major corporations with operations on the island. The foundation continues to be successful in attracting government grants, foundation support and corporate philanthropy, but building support from local individuals has been harder to achieve in a country that has neither great wealth nor a tradition of organized philanthropy. At the end of 1998, the PRCF's endowment was $18.5 million.

The foundation has attracted attention throughout the world, particularly in Latin America and the Caribbean. It has become a point of reference for Latin American community foundations on how to harness resources for the benefit of local communities.

In 1994, the PRCF established the Institute for the Development of Philanthropy, which in 1997 hosted an international conference on community philanthropy and intermediary organizations that was attended by representatives from Africa, Asia, the Caribbean and Latin America. A second conference is being planned.

South America

Brazil
Ecuador

U.S. Virgin Islands

Community foundations exist on the islands of St. Croix and St. John.

The St. Croix Foundation for Community Development was established in 1991. It has taken a leadership role on the island in helping to revitalize the local economy through a number of programs, including a community business loan program for new or existing small businesses. It has attracted U.S. government funding for a women's business center and for AmeriCorps literacy training on the island. Other programs are helping to restore a historic district on the island. The foundation also serves as a fiduciary for a number of smaller nonprofits on the island.

The St. John Community Foundation was officially established in 1990. It also is involved in community development, focusing on the economy and the environment. It took a leadership role in helping St. John recover from Hurricane Hugo that struck the island in 1989. It has partnered with the Audubon Society to restore wildlife habitat and works with the U.S. National Park Service on issues having to do with recreation and the environment.

Brazil

There is a growing interest in and acceptance of philanthropies in Brazil. The number of philanthropic organizations has more than doubled in the last ten years, even though widespread abuse of foundation funds in the past has left the word "philanthropy" with unsavory connotations. In place of philanthropy the terms "social responsibility" and "social investment" are more commonly used and accepted to get the concept across.

A planning effort is currently underway in Rio de Janeiro to establish a community foundation-like organi-

zation, Instituto Rio. The project is receiving technical assistance from the Synergos Institute in cooperation with two Brazilian organizations, Roda Viva and the Institute for Cultural Action (IDAC). The aim of the new foundation will be to provide more sustainable financing for nonprofit organizations in Rio that serve disadvantaged groups, in particular poor women and children. Interest in community foundations is growing in other parts of Brazil as well.

Resources: In addition to Synergos and its partner organizations, a support organization, Grupo de Institutos, Fundações e Empresas (GIFE), is bringing together businesses and philanthropic organizations to promote and carry out social development in Brazil. GIFE has shown an interest in promoting the community foundation concept in Brazil.

Ecuador

Fundación Esquel-Ecuador (FE-E) was formally established in 1990 as a national nonprofit independent foundation. It has a number of community foundation characteristics, but is concerned primarily with community development, focusing on the economic, social, and cultural needs of the most disadvantaged segments of Ecuadorian society. It supports development by helping the nation's poorest to solve their own problems and by seeking ways to modify the current conditions that promote social injustice. The founders of FE-E were motivated by concerns that traditional development models had not succeeded in creating sustainable solutions to the problems of poverty; funding for community development needed to be made more relevant to the existing needs and conditions in the targeted areas; and growth of the philanthropic sector in Ecuador needed to be nurtured in order to minimize the dependency on external sources of funding.

As one of the first foundations of its kind in Latin America, it has developed into a strong force in Ecuador's development and is a model for many other emerging community development foundations throughout the world. It has been very successful in attracting funds from many international funders, including foundations and government agencies; and as a consequence began making grants almost immediately in order to establish a presence within the country and gain credibility. FE-E has an endowment of about $900,000 drawn from foundation, corporate and individual sources. In order to ensure the long-term sustainability of its work, the foundation has adopted a policy of efficiency and transparency in the management of its resources to build trust in the organization. Since its founding ten years ago, Fundación Esquel-Ecuador has supported more than 250 projects, with the direct participation of more than 500,000 persons in all regions of Ecuador. FE-E has supported various studies on philanthropy in Ecuador and is looking at ways to encourage charitable giving among individuals and businesses.

II. Europe and the Middle East

United Kingdom

Britain had a rich tradition of private and secular community philanthropy that dates back at least to the English Reformation in the sixteenth century. The beginnings of the social welfare state in the nineteenth century caused this tradition to atrophy as the state took responsibility for meeting social needs. Today, community philanthropy is enjoying a renaissance. The United Kingdom now has community foundations in all of its component parts: England, Scotland, Wales and Northern Ireland. Even though the development of community foundations

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Western Europe

United Kingdom
Belgium
France
Germany
Ireland
Italy

The Community Foundation Network has been active in mentoring community foundations on the continent and is actively working to develop a London-wide community foundation affiliate model for the capital.

fits in well with the Blair government's focus on devolution and helping people to help themselves, the beginnings of the community foundation movement go back two decades to the early days of the Thatcher government, just as the United Kingdom was beginning to dismantle the social welfare state.

The first community foundation in the United Kingdom was the Northern Ireland Voluntary Trust, established in 1979 to support and encourage efforts of voluntary and community groups to tackle the worst effects of Northern Ireland's serious social, economic and community problems. Its initial funding came in the form of a £500,000 challenge grant (about $790,000 U.S.) from the central government to be matched one-to-one by funds raised independently by the Trust. Today, the Trust relies on income from the endowment and donations from individuals, foundations, statutory bodies and the European Union (EU). It is a respected nonsectarian organization trusted by Protestants and Catholics alike in its pursuit of community development and peace.

Initially, progress in the United Kingdom was slow. Impediments to establishing community foundations included the depressed state of the British economy in the 1980s, uncertainty about how to apply an American charitable model and the difficulty of selling the concept of endowment when immediate needs were so great. In addition to government support, community foundations in the 1980s received support for technical assistance from the Mott Foundation. They also were helped by the Charities Aid Foundation (CAF) in the United Kingdom. CAF was convinced of the importance of the model and was influential in persuading the Mott Foundation to set up a two-stage challenge grant program. Mott provided a challenge to CAF of £1 million (about $1.58 million U.S.) to support the development of U.K. community trusts and foundations if CAF could raise an equal amount in Britain. That challenge was met and the £2 million (about $3.16 million U.S.) was used to create a second challenge. The £2 million was divided into three equal grants to be awarded to three British community foundations on a competitive basis for a 2:1 match, which would create permanent endowments of £2 million in each foundation. The Tyne & Wear Foundation, Greater Bristol Foundation, and the Cleveland Community Foundation were awarded the challenge grants that were essential in attracting other donors to their foundations. The challenge program did much to raise the profile of community foundations in the United Kingdom. An unforeseen outcome of the challenge was that a number of other community foundations in the competition who did not receive grants would not be deterred and went ahead with their own endowment campaigns.

The community foundation movement began to hit its stride with the formation of the Association of Community Trusts and Foundations, the national membership association for community foundations, in 1991. The recent growth in numbers of community foundations also has been aided by the Labour government's focus on local decisionmaking and local initiative for solving social problems. The economy, which is growing and dynamic in many parts of the country, has increased the money available for giving. The disparities between the more prosperous areas and the industrial areas left behind in the current economic prosperity have also spurred community foundation development.

Facts: There are now 54 community foundations in the United Kingdom and their numbers are increasing rapidly. About half are in full operation and the rest are at early stages of development. At the end of the 1998-99 fiscal year, the combined total assets of the 24 most established community foundations reached £73,250,000 ($115,590,000 U.S.), more than double the assets two

years before. They made a total of nearly £19 million ($30 million U.S.) in grants up from £1.4 million ($2,210,000 U.S.) in 1992.

Resources: The Association of Community Trusts and Foundations (ACTAF) was established in London to promote and support community foundation development in the United Kingdom. It recently changed its name to the Community Foundation Network. The Community Foundation Network has been active in mentoring community foundations on the continent and is actively working to develop a London-wide community foundation affiliate model for the capital. The new structure, which will be know as the London Community Foundation Network, has grown out of informal collaborations and joint work during the past two years among London's one emerging and seven established community foundations. The new structure will extend community foundation services to areas of the city not currently being served.

Belgium

The King Baudouin Foundation (KBF) is an independent foundation established in 1976 to mark the 25th anniversary of the reign of King Baudouin of Belgium. The foundation is active in Belgium, but also funds projects in Europe and internationally. KBF accepts funds from individuals, nonprofits and corporations and provides them with services similar to a community foundation. Its board of governors is drawn from the leading figures and sectors in the country. Sources of income are its own resources (36 percent); its component funds (5 percent); the Belgian National Lottery (46 percent); and other sources (13 percent).

KBF is working to develop community foundation affiliates in at least two areas of the country. In Wallonia, efforts are underway to expand the Fond La Wartoise, which was set up in 1997 within KBF to serve the towns of Couvin, Momignies and Chimay and the surrounding rural area. The fund was initially established by the Chimay Wartoise Foundation, an entity created in 1996 by the Scourmont Abbey to run its successful beer and cheese production operations.

KBF is exploring the idea of establishing an affiliated regional community foundation in West Flanders with funds from the Levi Strauss Foundation. Levi Strauss recently closed a plant in that area and is interested in supporting local development initiatives in Belgium.

Resources: The King Baudouin Foundation recently announced the Community Foundation Exchange Fellowship, a pilot peer exchange program for community foundation professionals in Europe and the United States. The exchange program will select ten senior staff and trustees, five each from Europe and the United States, for a three-week program. Exchange fellows will undergo orientation and spend two and a half weeks in residence at their host community foundations. The program has been developed in partnership with the German Marshall Fund of the United States and with financial support from KBF's U.S. affiliate, the King Baudouin Foundation U.S., and the Charles Stewart Mott Foundation.

France

The Fondation de France is an independent, nonprofit foundation that operates in many respects like a national community foundation. Modeled on the Cleveland Foundation, it was founded in 1969 to help people, businesses and associations to realize philanthropic, cultural and scientific projects of general interest. It acts as an umbrella organization for individuals who want to form their own personal foundations and take advantage of the Fondation de France's program expertise and fiscal man-

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agement. It encourages the development of community organizations and associations by allowing them to set up accounts with the foundation, thereby giving donors the maximum tax incentives. The Fondation de France puts its methods and evaluations tools at the disposal of these associations; it also assesses priority needs and raises funds to meet them. The foundation relies on committees of experts, all volunteers, in specific project areas such as children, the arts, aging and medical diseases.

To strengthen its presence across the entire country, in 1989 the Fondation de France set up seven regional bodies that are composed of and run by volunteers. The regional bodies establish programs and keep the public informed about their operations locally as well as the foundation's activities nationwide. Because the regional bodies are closer to the field, they can react more quickly to local needs by supporting projects to which they bring technical expertise and/or financial assistance.

Germany

Community foundations have only recently been established in Germany, and their numbers have grown quickly. In late 1996, the first community foundation, Stadt Stiftung Gütersloh (City Foundation Gütersloh), was established in the hometown of the Bertelsmann Foundation, an independent operating foundation which took the lead role in creating the community foundation.

Community foundations have only recently been established in Germany, and their numbers have grown quickly.

Community foundations in Germany are commonly called citizens' or city foundations (Bürgerstiftung). Ten community foundations are now operating, and new ones are being established or considered in eight other areas. They have received start-up funds from individuals, from national foundations, and in a few cases from city governments. In addition to Gütersloh, community foundations currently exist in Berlin, Bad Oldesloe, Dresden, Fürstenfeldbruck, Hamburg, Hannover, München, Steingaden (Bayern), and Wismar. Community foundations are being formed in Quakenbrück and Nürnberg. They are being explored in Mannheim, Herten, Kassel, Goslar and Viernheim.

Resources: In a very short period of time, the Bertelsmann Foundation has become a lead player in the community foundation movement in Germany and internationally. The Bertelsmann Foundation has been promoting the community foundation concept within Germany and community philanthropy internationally through symposia and transatlantic exchange programs. The Bertelsmann Foundation recently partnered with the Charles Stewart Mott Foundation to create the "Transatlantic Community Foundation Network" to share experiences and knowledge, especially of management practices, among community foundations on both sides of the Atlantic. Its Philanthropy and Foundations division is also working to reform the legislative and regulatory climate for foundations in Germany. Other national foundations supporting community foundations include the Körber Stiftung and the Freudenberg Stiftung. The Maecenata Institut für Dritter-Sektor-Forschung is also actively promoting the community foundation concept. The Bundesverband Deutscher Stiftungen, a national association of foundations, has established an interest group on community foundations that brings together foundation professionals, funders and others interested in community foundation development in Germany.

Ireland

A new foundation with some community foundation characteristics was formed in Ireland in November 1998. The Irish Ministry for Social, Community and Family Affairs established the Foundation for Investing in Com-

munities to support voluntary and community activity. The Irish government helped set up the steering committee and provided £750,000 (Irish) (about $930,000 U.S.) in start-up funds. The Enterprise Trust, formed in 1992 by business groups to promote and facilitate the development of local enterprise networks, was incorporated into the new foundation. Another government initiative, the Children's Trust, also became a part of the foundation. The first priorities of the Foundation for Investing in Communities are support for voluntary and community-based projects, the continued development of local enterprise networks and new ways to address the needs of disadvantaged children. The foundation also is encouraging the business community to incorporate social responsibility into its business practices. When planning how to structure the foundation, the Irish government drew on the examples of the Northern Ireland Voluntary Trust, the Tyne and Wear Foundation, and the King Baudouin Foundation.

Italy

The first community foundation in Italy, the Fondazione della Provincia di Lecco (Community Foundation of Lecco), was formed in February l999. A second community foundation, the Fondazione Provinciale della Comunità Comasca (in Como) was established in December 1999. Two community foundations have been created thus far in 2000: Mantua in February and Novara in April. They were all established through a program developed by the Fondazione Cariplo, a Milan-based savings bank foundation. Fondazione Cariplo has pledged to help as many as 15 communities in the province of Lombardy in northern Italy establish community foundations if they desire, providing they meet certain requirements. The foundation will provide newly-formed community foundations with financial resources for endowment and regranting, technical assistance and investment services. Work is underway to establish community foundations in six other areas of Lombardy: Varese, Bergamo, Brescia, Pavia, and Cremona. Savings bank foundations in other parts of the country also have expressed interest in starting community foundations. The Venice Savings Bank Foundation is working to establish a community foundation east of Venice in the city of Portogruaro and the savings bank foundation in Perugia is interested in establishing a foundation in Umbria, in central Italy.

Resources: Savings bank foundations became interested in promoting community foundations as a consequence of banking reform legislation in Italy in the early 1990s. These reforms privatized the community-owned savings banks, separated their charitable functions from their business functions by creating banking foundations, and required the newly formed banking foundations to sell their bank shares. The result of this legislation was the formation of almost 90 banking foundations. Of these, the 82 savings bank foundations hold an endowment of almost $30 billion. As part of these reforms, the banking foundations are expected to use their resources to give back to the communities that were the source of their wealth. This requirement has caused a dilemma for some, since most foundations in Italy have been operational and lack a tradition of grantmaking. The establishment of community foundations is seen by a number of savings bank foundations as an ideal way to carry out this mission.

Bulgaria

In Bulgaria, as in other countries that are making the transition from a centralized totalitarian state to a democracy, the role of nonprofit organizations is becoming more

Central And Eastern Europe

Bulgaria
Carpathia
Czech Republic
Slovakia
Poland
Russia

The Open Society Fund-Sofia has as its mission to build a society and state in post-Communist Bulgaria based on the values of free thought, democracy, market economy, and respect for human rights.

important. Neither the local governments nor the emerging private sector can respond adequately to meet local needs that previously were the responsibility of the central government.

Community foundation-like organizations in Bulgaria are evolving out some of the Open Society Clubs begun with the assistance of the Open Society Fund–Sofia, which itself was established in 1990 by financier and philanthropist George Soros. The Open Society Fund–Sofia has as its mission to build a society and state in post-Communist Bulgaria based on the values of free thought, democracy, market economy and respect for human rights. The first Open Society Club was established in 1992; today, there are 13 clubs. The clubs were originally formed to promote civic discourse and encourage citizen participation in local communities, but began to take on the role of raising funds for and making grants to local projects. From 1993 to 1998, the Charles Stewart Mott Foundation granted more than $1 million to the Open Society Fund–Sofia for support of a community philanthropy program that targeted six Open Society Clubs in Bulgaria. After an evaluation of the program by the Mott Foundation, the six clubs were asked to apply for direct grants on a competitive basis. In 1999, grants were awarded grants to Open Society Clubs in Bourgas, Rousse, Sliven, and Varna, which are evolving into community foundation-like organizations.

Resources: In 1998, the 13 Open Society Clubs formed the Bulgarian Association for Regional Development (BARD), committed to identifying local problems, addressing local community needs and encouraging local philanthropy. BARD promotes information exchange and networking among its members and has hosted a meeting of the Mott Foundation grants recipients.

Carpathian Euroregion

The Carpathian Euroregion encompasses a mountainous area of eastern Europe where five countries share common borders and common problems of poverty and isolation. The region includes parts of Hungary, Slovakia, Poland, Romania and Ukraine. In order to help defuse the ethnic and religious tensions in the area, leaders from the five countries signed a proclamation in 1993 creating the Carpathian Euroregion, which is a mechanism for governmental cooperation. An outgrowth of this process, but independent of it, was the creation of the Carpathian Foundation, a regional foundation that has many of the qualities of a community foundation. It was established in 1994 as the Fund for the Development of the Carpathian Euroregion under the auspices of the EastWest Institute with major funding from the Mott Foundation. It became an independent foundation in 1999. The Carpathian Foundation supports public/private/NGO partnerships and cross-border and inter-ethnic approaches to regional and community development and conflict prevention. It raises funds and provides grants and technical assistance to strengthen the capacity of grassroots nonprofits active in these areas, and works to strengthen local and regional development units. In addition to support from the Mott Foundation, the Carpathian Foundation has received grants from Charities Know How Fund, U.S. Information Service, Open Society Institute, the King Baudouin Foundation, and the European Union Phare Democracy Program.

Czech Republic

The first community foundation in the Czech Republic, the Komunitní Nadace Ústí nad Labem (Ústí nad Labem Community Foundation), was formed in 1998 as

the result of the transformation of a local nonprofit social service agency. The Regional Fund Foundation was originally established in 1993 to work on a project for community care for the mentally ill, mentally handicapped and drug addicts in the region of Ústi nad Labem. It developed into an intermediary for transforming social and health services, and helped create policy in the field. Funding from the Mott Foundation has aided in the transition of the fund into a community foundation. The community foundation has received technical assistance from the U.S.-based Community Foundation Silicon Valley and other U.S. community foundations to develop its grantmaking, asset-based community development, community leadership, youth involvement in grantmaking processes, and assessment of community needs.

Resources: The Open Society Fund–Prague is heading up the Community Partnership Support Initiative, a consortium of organizations that include Nadace VIA, The Partnership Foundation and the Ústí nad Labem Community Foundation. The main purposes of the initiative are to promote the development of community philanthropy, democracy and community partnerships at the local level through a program of small grants and technical assistance. The initiative's primary goals are to gather and spread model examples of community-based projects and to organize forums for exchange of information and discussion of concepts related to community development among the 15 Czech communities participating in the project. It is expected that other community foundations will develop out of this project. The Mott Foundation has been a major supporter of this initiative.

Slovakia

In 1991, the city of Banská Bystrica made a commitment to participate in the World Health Organization's "Healthy Cities" project. The term "Healthy Cities" itself goes back to 1985 and means more than just good healthcare. It recognizes that communities are healthy when citizens actively participate in the life of their community and in solving its problems. In support of the World Health Organization project, the Rotary Club of Banská Bystrica initiated the Healthy City Foundation as an operating foundation in 1992, which was transformed two years later into the Healthy City-Community Foundation of Banská Bystrica, the first community foundation in Central and Eastern Europe.

One of the significant challenges facing the new foundation is to build a climate of trust in its operations and its mission. Domestic fundraising is not easy in a country that is undergoing a challenging transition in its economy and political structures, where society lacks mutual trust and a tradition of charitable giving. Even so, local Rotarians and city council members were able to put together a donation of $30,000 from the city to begin local grantmaking and international fundraising. Strategic, long-term funding in the form of a matching grant from the Mott Foundation was crucial for developing the foundation. Fundraising from the small, newly created business community for achieving long-term goals rather than meeting immediate tragedies has been difficult. Instead, the community foundation has focused on raising smaller contributions from a large number of middle class people, a workable strategy in the post-Communist environment. In order to gain trust, the community foundation discovered that it is essential to have conflict of interest policies in place and that its administrative procedures must be transparent. Another strategy the community foundation in Banská Bystrica has used over the last five years is to increase its service area. Banská Bystrica is a relatively small city of about 100,000 people. The foundation began by serving just the city itself. Since

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then it has expanded to include rural areas around the city, and more recently a neighboring city and county. Currently, its population base is about 200,000 people.

Since 1994, organizations with similar characteristics have formed in at least ten other areas, including Tencin, Presov, Pezinok and Bratislava-Petrzalka.

Resources: An informal network exists among the community philanthropy organizations in Slovakia. In addition to the Mott Foundation, major funders in this area include the Open Society Fund–Bratislava and the Rockefeller Brothers Fund. A portion of a recent USAID grant awarded to the Ekopolis Foundation, a national Slovak organization, will be used to stimulate new community foundation growth in the country and to establish a national technical assistance center for community foundations.

Poland

Community foundations are actively under development in Poland, aided by the Center for the Development of Community Foundations, one of the three main operational programs of the Academy for the Development of Philanthropy in Poland.

Community foundations are under development in Poland, aided by the Center for the Development of Community Foundations, one of the three main operational programs of the Academy for the Development of Philanthropy in Poland (ADPP). The Academy has developed a grantmaking and technical assistance program to promote community foundations. Communities have been invited to devise a strategy for their foundations and to apply to the program. Those that are accepted into the first round are eligible for matching funds on a one-to-one basis for operating costs and grantmaking up to a specified amount. The criteria for endowment funds are based on the population size of the communities in the program. Any funds remaining will be distributed in a second round of funding on a two-to-one basis.

The first community foundation created was the Snieznik Massif (Snow Mountain) Community Foundation in Bystrzyca Klodzka in late 1998. The Academy has targeted a total of 14 communities in Poland in which to establish community foundations. In addition to Snow Mountain, community foundations have been formed or are being developed in Lidzbark Warminski, Tomaszow Mazowiecki, Bilgoraj, Nidzica, Kielce, Zelow, Raciborz, Elblag, Lezajsk, Lublin, Rzeszow, Bielsko-Bila and Sokoka.

Resources: The Academy for the Development of Philanthropy in Poland evolved out of the Democracy Network (DemNet) Project, a USAID-funded program run by the Academy for Educational Development (AED). AED's mission was to build capacity and strengthen the sector through technical assistance and grants. Poland had the largest DemNet project in the region and one of the most highly developed NGO sectors, even though most individual nonprofits were small and both structurally and financially fragile. Under AED, the community foundation concept was explored through feasibility studies and study tours.

The Academy was formed in June 1998 when the DemNet project ended. ADPP's mission is to continue to promote citizen participation and the long-term sustainability of the nonprofit sector. A major initiative of ADPP has been to introduce community foundations into Poland and to provide start-up funds and fundraising information and expertise. ADPP has received support for its efforts from the Stefan Batory Foundation and the Mott Foundation.

Another national organization, the Foundation in Support of Local Democracy, is helping to establish community foundations in three additional communities.

Russia

The development of community foundations in Russia has been a major initiative of the U.K.-based Charities Aid

Foundation's Russian affiliate (CAF Russia) since 1994. For many reasons, it has not been easy to promote the concept in Russia. Under the Soviet regime any type of individual or religious philanthropy was considered elitist, denigrated as a throwback to the tsarist era and crushed. "Volunteerism" was a term that meant free forced labor demanded by the state. Donations from corporations for state-sponsored projects were considered to be a "charitable racket" or little more than extortion.

CAF Russia learned that to be successful in Russia, community foundations must first build trust. They need to have the broadest possible support from all levels of the public—not just from the richest individuals, the local government and corporations. The community foundations have to start at the grass roots with a broad base of support from local individuals. Infusions of large sums of money from international funders and the local business community will only create suspicion about the purpose of a community foundation and make it a target for takeover by governments, local factions or others who covet its resources. The community foundation must demonstrate what philanthropy can and should be through transparent operations, wide community participation and a democratic system of decisionmaking.

In spite of all these enormous obstacles, the first community foundation in Russia, the Togliatti Community Foundation, was formed in early 1998 after three years of development efforts by CAF Russia. Togliatti is a large industrial city on the Volga River where the largest Russian car plant is located. The city and its surrounding area have a population of about 700,000 people. During the first year of operations, all three members of the Togliatti Community Foundation staff worked as volunteers. They were able to attract and distribute in grants about $80,000 given by local donors, raise an endowment of $83,000, and gain substantial support from the local community. The foundation also established two donor-advised funds opened by two local banks. In 1999 the foundation received additional funding for operating expenses from the Ford Foundation, the Eurasia Foundation, and the National Lottery Charities Board (U.K.). Part of the National Lottery Charities Board grant provided matching funds of $30,000 for two years of grantmaking. The Mott Foundation made a grant to the foundation in 2000 for a philanthropy development program.

The rate of formation of new community foundations is increasing rapidly. Five community foundations were established in Russia in 1999 through mid-January 2000: Tyumen, Lomonosov, Samara, Obninsk and, most recently, Moscow. Another four foundations are expected to be created in 2000.

Resources: CAF Russia provides a broad range of information, technical assistance, training and other services to these groups through a special community foundation development program. Funders of the program include the Ford Foundation, Charles Stewart Mott Foundation and a private funder.

Israel

Explorations are underway to establish the Beit She'an Valley Community Foundation in an area near the Jordanian border that has a population of about 13,000. This project is being sponsored by the Cleveland Jewish Community Federation of Ohio with technical assistance from The Cleveland Foundation.

Another community philanthropy organization in Israel is the Jerusalem Foundation. It was established in 1966 by the then newly elected mayor of the city, Teddy Kollek. It is a nonpolitical, nonsectarian, independent foundation, whose mission is to rebuild the city and improve the quality of life for all of Jerusalem's residents,

Five community foundations were established in Russia in 1999 through mid-January 2000.

Middle East

Israel

Africa

Kenya
Zimbabwe
West Africa
Mozambique
South Africa

The impetus for forming this community foundation-like organization came out of the region's traditions of self-reliance and mutual support... It will build on the tradition of qogelela, a group savings practice in which families in a community pool their funds to make investments.

regardless of ethnic or religious background. It does this by working closely with the municipal government and with other local organizations. It undertakes capital projects and funds other nonprofit organizations. The Jerusalem Foundation continues to rely, as do most Israeli nonprofit organizations, on private contributions from abroad for the majority of its support. It has built a network of nine international boards plus the local Israeli board to focus fundraising for the foundation. Nine percent of the donations to the Jerusalem Foundation in 1998 came from Israeli sources.

Even though there is a strong tradition of individual charity, volunteerism and mobilization for national causes in Israel, financial support for the nonprofit sector until recently has been less widespread. As the nation is becoming more secure, Israel is developing a thriving nonprofit sector. A number of projects are underway to study the nonprofit sector, to strengthen the legal and regulatory structures that support it, and to provide technical assistance to nonprofit groups in local fundraising techniques.

III. Africa

Kenya

Kenya, like many other African nations, is struggling to emerge from the legacy of its colonial past. Kenya is an extremely poor country, with nearly half its population considered to be below the poverty line. The divisions between rich and poor have been exacerbated by Kenya's effort to renew economic growth and offset its enormous debt burden. Since 1993, the government of Kenya has implemented a program of economic liberalization and reform. With the privatization of public institutions and economic liberalization of the economy, Kenya has suffered significant reductions in government expenditures on health, education and other social services.

The Kenya Community Development Foundation was established in 1996 to build the capacity of citizen organizations to participate in community development activities and to introduce national philanthropy for development. The foundation provides grants to grassroots groups and supports training activities for nonprofit and government agencies working with low income groups. Major start-up funding for the foundation came from the Ford Foundation and the Aga Khan Foundation.

Zimbabwe

The Western Region Foundation was formed in 1997 after six years of planning by the Organization of Rural Associations for Progress (ORAP) and the Synergos Institute. The foundation's service area has a high population density and holds nearly a quarter of Zimbabwe's 12 million inhabitants. The vast majority of the people are poor and live in a rural area that is subject to extreme water shortages and recurrent drought, food shortages and scarce economic opportunities.

The impetus for forming this community foundation-like organization came out of the region's traditions of self-reliance and mutual support. Its mission is to provide technical assistance and financial resources for grassroots groups, assist farmers to improve agricultural practices and livestock production, and help communities provide clean water, food and adequate healthcare in the region. The foundation intends to establish a local and permanent financial base with which to seed its grantmaking. It will build on the tradition of qogelela, a group savings practice in which families in a community pool their funds to make investments. Qogelela funds will form part of the

foundation's endowment. In addition to raising its own funds, the foundation has attracted funding from the Open Society for Zimbabwe, the Carnegie Corporation and the United Nations Development Program and receives technical assistance from the Synergos Institute.

West Africa

A community foundation hybrid, the West African Rural Foundation (WARF), based in Dakar, Senegal, was established in 1993. It evolved out of another nonprofit research and support agency that was serving five countries in West Africa. The foundation continues to serve these five countries that are closely linked by history, culture, ethnicity, language and trade: Senegal, Gambia, Mali, Republic of Guinea and Guinea Bissau. It concentrates its efforts in four program areas: rural entrepreneurship, gender equity in development, local governance and regional integration. Just as in other countries around the world, the national governments of the five countries are moving to decentralize authority to local governments. WARF works to improve community participation in government and to improve the effectiveness of governance of all kinds. Overall, it seeks to strengthen local organizations and promote participatory methods of research and development through grants and technical assistance. The foundation works intensively with its grantees. It first assesses their capacity to carry out the projects proposed, then puts together technical assistance packages to give the nonprofits the tools they need to succeed and to manage the grants received. The foundation is headed by a board of governors drawn from citizen volunteers from each of the five countries. Its staff is also recruited from Africans in the subregion. Major supporters have been the Ford Foundation, the International Development Research Center, and Development Innovations and Networks.

Mozambique

The Foundation for Community Development (FCD), the first grantmaking foundation in Mozambique, was established in 1994 through the efforts of the former First Lady and Education Minister of Mozambique, Graça Michel, and a broad-based group of Mozambican citizens. Mozambique won its independence from Portugal in 1975, but faced a legacy of colonial neglect and a protracted civil war that ended in 1992. At independence, Mozambique inherited an agricultural economy with very little industrial development. In 1994, Mozambique ranked as one of the poorest countries in the world. The task of rebuilding a country and of creating a nonprofit sector was enormous. FCD developed a set of priorities to combat poverty that includes matching funds for community development efforts, funds for revolving credit programs, training programs for community-based nonprofit groups, and the development of eco-tourism. It also supports group initiatives such as associations, cooperatives, and cultural groups that promote the material and social well-being of communities.

Resources: FCD was started with the help of the Synergos Institute. Its initial endowment was created by means of a debt swap and the support of an American foundation. Major donors include Mozambican businesses, multinational companies, the MacArthur Foundation, the Ford Foundation, the Bill and Melinda Gates Foundation, and the Craig and Susan McCaw Foundation.

South Africa

South Africa emerged from the apartheid era with enormous social and economic needs and a challenge to rebuild the country on democratic and non-racialist principles. In its favor was a long tradition of local self-

SAGA launched the community foundation development program in 1998 to promote the community foundation model and provide information, training, and technical assistance to community leaders throughout South Africa.

help and community solidarity forged in opposition to the government. Reliance on one's neighbors to meet community needs helped make up for the lack of government services, especially in the townships. Community leaders are seeking to harness that tradition and have undertaken an ambitious program of community foundation development led by the Southern African Grantmakers Association (SAGA).

The Uthungulu Community Foundation, in Richards Bay on the east coast of South Africa, is the first community foundation, established in July 1999. It has already raised an endowment of R5 million (about $790,000 U.S.), but has not yet made any grants. Other regions have community foundations in the development stage. Greater Rustenburg, North West province, expects to launch by the middle of 2000 and already has firm commitments of about R2 million ($316,000 U.S.) from corporations and private individuals. Greater Stutterheim in the Eastern Cape recently received a firm commitment from a local foundation for a combination of seed funding and matching grants and expects to launch by November 2000. It is working in partnership with various national sports bodies to establish a multipurpose sports complex that will give the foundation immediate impact and high visibility. The community foundation being developed in Greater Pretoria is catching up fast. The U.S. ambassador to South Africa, the Honorable James Joseph, formerly president of the Council on Foundations, has committed to help establish the community foundation there. Other areas where there is interest include: Far North–Northern Province; Middleburg–Mpumalanga; Goldfields–Freestate; Durban Metro–KwaZulu Natal; Potshepstone–Umtata–Eastern Cape; and Douglas–Northern Cape.

Resources: The Southern African Grantmakers Association (SAGA) was founded in 1995 as a result of informal networking among corporate grantmakers. Its mission is to optimize the relevance, efficiency and impact of grantmaking in South Africa. SAGA launched the community foundation development program in 1998 to promote the community foundation model and provide information, training and technical assistance to community leaders throughout South Africa. The program receives support from the Ford, Mott and Kellogg foundations.

IV. Asia and the Pacific

Australia

The community foundation concept is relatively new in Australia, although the numbers have grown steadily in recent years. There are five community foundations currently operating: the Victorian Community Foundation; established in 1983, the Queensland Community Foundation, 1986; the Tasmanian Community Foundation, 1995; the Melbourne Community Foundation, 1997; and the newly established New South Wales (NSW) Community Foundation. ANZ Trustees, a statutory trustee company operating in mainland Australia, is the trustee for the NSW, Queensland and Victorian community foundations. Two national initiatives are being explored, one dealing with rural issues and the other associated with celebrating the country's centennial, which may lead to the establishment of additional community foundations or hybrid organizations.

Resources: Philanthropy Australia, the national membership association for grantmakers, was established in 1975. Its activities include education, networking, advocacy and publications. In addition, it is assisting in exploring the feasibility of creating the centennial foundation. The Sidney Myer Fund and the Myer Foundation

have been major supporters of community foundations in Australia.

New Zealand

Eleven community trusts were established in New Zealand as the result of the 1988 Trustee Banks Restructuring Act that privatized community savings banks. The local savings banks had been community owned and their surplus profits were disbursed for local charitable purposes. The 1988 act restructured the banks, giving them limited company status. Ownership of the banks was given to the communities through the establishment of community trusts, which owned 100 percent of the shares in the banks. At the time, the savings banks were not thought of as being highly valuable; but the assets of the savings bank trusts increased substantially when the shares were sold to an international banking firm in 1996. Currently there are $2 billion (New Zealand) ($976 million U.S.) in combined assets in the community trusts.

The community trusts are interesting hybrids. Each community trust is responsible for grantmaking in its own region. The responsibility for appointing the trustees is vested in the national government, although the trustees are selected from prominent local individuals and are expected to be independent of influence. The community trusts are not involved in fundraising at this time.

The 11 savings bank trusts are ASB Trusts, Eastern and Central Community Trust, Wanganui Community Trust, TSB Community Trusts, Wellington Community Trust, Bay of Plenty Trust, Westland Community Trust, The Community Trust Canterbury, Community Trust of Otago, Southland Community Trust and South Canterbury Community Trust. A number of energy trusts were created at about the same time from the privatization of public utilities. Some of these also appear be to turning into community trusts.

Resources: New Zealand Association of Philanthropic Trusts, also known as Philanthropy NZ, was formed in 1990 to facilitate effective grantmaking by focusing on three major tasks: taxation, research and education.

Japan

The Great Hanshin-Awaji earthquake in January 1995 shook up more than just the city of Kobe. It was the worst natural disaster in post-World War II Japan and left approximately 6,400 people dead, 40,000 injured, 250,000 structures damaged or destroyed, and 317,000 people in temporary shelters. When local and national governments were not able to cope with a disaster on this scale, citizens and voluntary organizations rushed to fill the gap.

The experience of the Kobe earthquake provided a watershed moment for nonprofits in Japan. Prior to the earthquake, volunteerism and the nonprofit sector were considered foreign ideas that would not work in Japan. Beginning in the 1970s, Japan focused much of its philanthropy on projects outside of Japan. The government was expected to provide for all its citizens' needs internally. No legal framework existed for small civic groups to incorporate. The public benefit corporations that did exist were large, expensive to set up, and little more than extensions of government. The earthquake led directly to a new Non Profit Organizations (NPO) Law that was enacted in March 1998. The legislation makes it easier for local grassroots organizations to incorporate and gives them a credibility with funders they did not have previously.

Even as NPOs enjoy growing acceptance and recognition in Japan, the country's foundations have not received the same privileges. The new NPO law did not cover Japanese foundations, which still operate under tight government restrictions. Japanese foundations are not

The experience of the Kobe earthquake provided a watershed moment in the history of nonprofits in Japan.

allowed to invest in equities or make investments outside the country. As a result, foundation endowments, which are invested in fixed income securities, are earning well under 5 percent annually in the current economic climate. Changes in foundation law are being considered but will take time to implement.

The only community foundation in Japan is the Osaka Community Foundation, which was established in 1991 with an endowment by the Osaka Chamber of Commerce and Industry. The foundation is supported by member fees as well as donations from individuals and corporations. It funds activities in science and technology, the arts and culture, the handicapped and aged, international exchange, and scholarships for local students. Following the Kobe earthquake, it supported organizations that were involved in recovery and rebuilding. It currently has about 1.1 billion yen ($10 million U.S.) in assets.

In the wake of the earthquake a community fund, the Hanshin-Awaji Community Fund, was established in Kobe in May 1996. It was endowed with the proceeds of motorboat races held especially to generate earthquake relief funds. The fund totaled 800 million yen ($7.2 million U.S.) to be spent in three years by making grants. It focused its programs on three grant areas: community redevelopment; community service, and support for NPOs and philanthropy. The Hanshin/Awaji Community Fund terminated at the end of March 1999. A successor organization, the Shimin (Citizens) Fund Kobe, is being formed by a group of volunteers. Its purpose is not just to continue recovery activities, but to help consolidate a financial base for NPO support. By mid-1999 it had raised 5 million yen (about $45,500 U.S.) and expected to have another 30 million yen ($273,000 U.S.) transferred to it from the Hanshin-Awaji Community Fund. The new fund planned to apply for NPO status in July 1999 and expected approval by November.

India

India currently has one community foundation, the Bombay Community Public Trust (BCPT), established in July 1991. It was founded by the directors of the Centre for Advancement of Philanthropy to improve the quality of life for the citizens of Bombay (since renamed Mumbai). The impetus for its creation was an examination of how community trusts function in other parts of the world.

BCPT primarily funds voluntary agencies trying new approaches to problems that are not being addressed by government or the private sector.

BCPT has kept a low profile up to now, but is embarking on a strategy to increase awareness of its activities and functions by the public and potential donors, including individuals, corporations, trusts and other organizations. At the end of March 1999, BCPT had assets totaling Rs. 27.44 million (about $631,000 U.S.). Although the Trust does not now have an endowment, it has plans to establish one.

Other areas of India that are considering the establishment of community foundations include Delhi and Pune.

Resources: Interest in community foundations in India is increasing. In addition to the work of the Centre for the Advancement of Philanthropy in Mumbai, the Indian Centre for Philanthropy in New Delhi has been actively promoting the community foundation concept. The Ford Foundation's New Delhi office is exploring the potential for developing community foundations in India.

Summary

The growth in the numbers of community foundations and community foundation-like organizations in the last decade has been remarkable. The creativity and ingenuity communities have displayed in developing the community foundation concept is a testimony to the power of the idea and its effectiveness. The hard work of building community foundations today will make life better for the generations to come. In the future, it will be easier to form new community foundations because of the initiatives underway today to share knowledge among community foundations, within countries and across national borders. Associations and support organizations are meeting regionally, nationally and internationally to inform their peers of what works best so that these innovative practices can be adapted and used elsewhere. This is an exciting time in the history of the community foundation movement. As more and more community foundations are developed around the world, every country, region and community will find a way to take the concept and make it truly their own.

The creativity and ingenuity communities have displayed in developing the community foundation concept is a testimony to the power of the idea and its effectiveness.

Appendix I

Community Foundations and Community Foundation-Like Organizations around the World

Region/Country	*Location*	*Date established*
North America		
United States of America	Approximately 600 community foundations exist today. The first one was established in 1914 in Cleveland, Ohio. (Contact the Council on Foundations for more detailed information.)	
Canada	Nearly 100 community foundations have been created. The first one was established in Winnipeg, Manitoba in 1921. (Contact Community Foundations of Canada for more detailed information.)	
Mexico		
Fundación Comunitaria Oaxaca	Oaxaca, Oaxaca	1996
Fundación León	Leon, Guanajuato	1999
Fundación Comunitaria del Bajío	Irapuato, Guanajuato	1997
Fundación Comunitaria Morelense	Cuernavaca, Morelos	1997
Fundación Comunitaria de Cuautla	Cuautla, Morelos	1997
Fundación Comunitaria Regional de Celaya	Celaya, Guanajuato	1998
Fundación Comunitaria de Puebla	Atlixco, Puebla	1999
Fundación Cozumel	Cozumel, Quintana Roo	1991
Fundación del Empresariado Chihuahuense	Chihuahua, Chihuahua	1996
Fondo Córdoba	Cordoba, Veracruz	1986
Comunidad, A.C, Fundación para el Desarollo de Morelos	Cuernavaca, Morelos	1996_
Fundación Vamos	Mexico, D.F.	1996
Fundación Demos	Mexico, D.F.	1993
Caribbean		
British West Indies		
Anguilla Community Foundation	Anguilla	1999

Region/Country	*Location*	*Date established*
U.S. Virgin Islands		
St. Croix Community Foundation	Christiansted	1991
St. John Community Foundation	St. John	1990
Puerto Rico		
Puerto Rico Community Foundation	San Juan	1985
South America		
Brazil		
Instituto Rio	Rio de Janeiro	Organizing
Ecuador		
Fundación Esquel-Ecuador	Quito	1990
Western Europe		
United Kingdom	Around 50 community foundations have been established. The first one was the Northern Ireland Voluntary Trust established in 1979. (Consult Community Foundation Network (formerly ACTAF) for more details.)	
France		
Fondation de France	Paris	1969
Belgium		
King Baudouin Foundation	Brussels	1976
Germany		
Stadt Stiftung Gütersloh	Gütersloh	1996
Bürgerstiftung Hannover	Hannover	1997
Bürgerstiftung Steingaden	Steingaden (Bayern)	1997
Bürgerstiftung Wismar	Wismar	1998
Bürgerstiftung Storman	Bad Oldesloe	1998
Bürgerstiftung Dresden	Dresden	1999
Bürgerstiftung für den Landkreis Fürstenfeldbruck	Fürstenfeldbruck	1999
Bürgerstiftung „Zukunftsfähiges München“	München	1999

Region/Country	*Location*	*Date established*
Germany cont d		
Bürgerstiftung Hamburg	Hamburg	1999
Bürgerstiftung Berlin	Berlin	1999
Stadtstiftung Quakenbrück	Quakenbrück	Organizing
Bürgerstiftung Nürnberg	Nürnberg	Organizing
Ireland		
Foundation for Investing in Communities	Dublin	1998
Italy		
Fondazione della Provincia di Lecco	Lecco	1999
Fondazione della Comunità Comasca	Como	1999
Fondazione della Comunità Mantovana	Mantua	2000
Fondazione della Comunità Novara	Novara	2000
Central and Eastern Europe		
Bulgaria		
Open Society Club-Bourgas	Bourgas	1994
Open Society Club-Rousse	Rousse	1992
Open Society Club-Sliven	Sliven	1992
Open Society Club-Varna	Varna	1992
Carpathian Euroregion		
Carpathian Foundation	Kosice, Slovakia	1995
Czech Republic		
Komunitní Nadace Ústí nad Labem	Ústí nad Labem	1998
Slovakia		
Healthy City–Community Foundation of Banská Bystrica	Banská Bystrica	1994
Poland		
Podbeskidzie Community Foundation	Podbeskidzie region	1999
Community Foundation of the Bilgoraj Region	County of Bilgoraj	1999
Snieznik Massif Community Foundation	Bystrzyca Klodzka	1998
Elblag Community Foundation	County of Elblag	1999
Swietokrzyski Region Community Foundation	County of Kielce	1999

Region/Country	*Location*	*Date established*
Poland cont d		
Lezajsk Community Foundation	Lezajsk	1999
Lidzbark and Warmia Community Foundation	Lidzbark and Warmia	1999
Nidzica Community Foundation	County of Nidzica	1999
Racibórz Community Foundation	Racibórz	1999
Podkarpacie Region Community Foundation in Rzeszów	Rzeszów	2000
Sokólka Community Foundation	County of Sokólka	1999
The 2000 Community Foundation in Tomaszów Mazowiecki	County of Tomaszów	1999
The "Together" Charitable Association Community Foundation of Zelów	Zelów	1999
Russia		
Togliatti Foundation	Togliatti	1998
Tyumen Community Foundation	Tyumen	1999
Lomonosov Community Foundation	Lomonosov	1999
Samara Community Foundation	Samara	1999
Obninsk Community Foundation	Obninsk	1999
Moscow Community Foundation	Moscow	2000
Middle East		
Israel		
Beit She'an Valley Community Foundation	Beit She'an	Organizing
Jerusalem Foundation	Jerusalem	1966
Africa		
Kenya		
Kenya Community Development Foundation	Nairobi	1996
Zimbabwe		
Western Region Foundation	Buluwayo	1997
West Africa		
West Africa Rural Foundation	Dakar, Senegal	1993

Region/Country	*Location*	*Date established*
Mozambique		
Foundation for Community Development	Maputo	1990
South Africa		
Uthungulu Community Foundation	Richards Bay	1999
Greater Rustenburg Community Foundation	North West Province	2000
Greater Stutterheim Community Foundation	Eastern Cape	2000
Greater Pretoria Community Foundation	Pretoria	Organizing
Asia		
Australia		
Victorian Community Foundation	Victoria	1983
Queensland Community Foundation	Queensland	1986
NSW Community Foundation	New South Wales	
Tasmanian Community Foundation	Tasmania	1995
Melbourne Community Foundation	Melbourne	1997
New Zealand		
ASB Trusts		1988
Eastern and Central Community Trust		1988
Wanganui Community Trust	Wanganui	1988
TSB Community Trusts		
Wellington Community Trust	Wellington	1988
Bay of Plenty Trust	Bay of Plenty	1988
Westland Community Trust	Westland	1988
The Community Trust Canterbury	Canterbury	1988
Community Trust of Otago	Otago	1988
Community Trust of Southland	Southland	1988
South Canterbury Community Trust	South Canterbury	1988
Waikato Community Trust	Waikato	1988
Japan		
Osaka Community Foundation	Osaka	1991
Shimin (Citizens) Fund Kobe	Kobe	Organizing
India		
Bombay Community Public Trust	Mumbai	1991

Associations And Organizations Around The World With Programs That Support Community Foundations

North America

United States and the Caribbean

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