

Connecting Community Foundations

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Executive Summary

Connecting Community Foundations documents and shapes program design for global community foundation messaging through a proactive communications and marketing strategy. It proposes creation of new and innovative ways to position and promote community foundations worldwide, with emphasis on being the trusted philanthropic leadership vehicle of choice for all citizens, embracing the traditions of community-building and responsiveness.

This position paper examines how potential for international collaboration can be formalized and expanded to enhance our community foundation movement through broad, common messages and through creation of a global information hub for community foundations. The research identifies existing international knowledge networks and, from this data, a framework to undertake a community foundation branding exercise is suggested. The research does not identify messages, only that the opportunity exists, through an agile and innovative task force agenda, to create broad common themes to help community foundations build awareness, understanding and a staked position around the globe.

Another outcome of this proposed collaboration recommends establishment and ongoing maintenance of a community foundation online portal. This portal would be the 'Grand Central' of community foundation best practices, latest research findings, resources and tools; all housed on the same website and available to all. The need and support for such a portal is confirmed, while logistical and operational details are yet to be defined. The internet – today's philanthropic power tool - has only begun to show what it can do for collaboration, community building and donors. Via the internet, the potential for this type of dynamic network and sharing of new ideas and potential collaborations is unlimited.

Ultimately, whether you live in South America, Asia, Europe or Canada, through this communications initiative, if you see an identifying community foundation symbol and/or hear a common message, you will know what the symbol means, what the message means to you, in your community and how the global network of community foundations benefits us all. Engagement with your local community foundation reflects collaboration, innovation and local focus as part of a global philanthropic movement.

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Introduction, Overview and Rationale

Community foundations world-wide have entered an era of unprecedented opportunity – opportunity to be greater catalysts for community change and community leadership, opportunity to leverage new and unique community building partnerships, and opportunity to learn, collaborate and benefit through our local and global experiences and expertise.

The recent Community Foundations of Canada International Conference, held in Montreal in November 2008, brought together foundation leaders from around the globe, to connect, to share, to learn from and with each other. The theme for this biennial gathering of more than 700 people was “Our Communities. Our World.” These short phrases speak volumes to the positioning and focus community foundations must take if the movement’s ongoing goal is to be recognized and trusted in the crowded philanthropic marketplace today and in the future.

If community building and leadership via and through community foundations, no matter the geography, are to be achieved, our thinking and global positioning must also be cemented. This paper examines the variety of current and historic networks amongst community foundations and suggests how we can potentially establish a common, recognizable vehicle for communications and marketing activities to better brand and position the community foundation movement worldwide.

Collaborative relationships amongst members, volunteers, staff and other organizations that respect independence and diversity, and that foster dialogue and sharing of ideas and experiences, are a powerful catalyst for strengthening our communities. Existing boundaries must fall away from our community foundation networks, and we must find more opportunities to benefit from our collective community-building knowledge and collaborative spirit which reflects the very core of what makes the community foundation movement so successful.

Creating new networks, refining existing ones and generating new ways of approaching our challenges and opportunities will ensure the sector, and the communities we serve, continue to embrace new and innovative approaches. Our working landscape is crowded with organizations and corporate entities wanting to stake their territory in this philanthropic marketplace.

How can shared values, experiences, and goals guide and position our vision for communities and for our collective community foundation future willingly together and yet remaining uniquely independent?

As Lucy Bernholz wrote in the 2005 publication *On the Brink of New Promise*, “Community foundations are a prominent feature in the picture of community philanthropy, but they are by no means alone.”¹

Community foundations must decide to position themselves very publicly as the ‘recognized and respected’ voice and face of community expertise, and the future of philanthropy – locally and

¹ Lucy Bernholz, Katherine Futon and Gabriel Kasper, *On the Brink of New Promise*, Blueprint Research and Design, Inc., 2005.

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globally. We can succeed if we create new and effective ways of harmonizing our foundation voice, using broad, uncomplicated messages.

“The ingredients of a culture of giving include the common language of a culture of giving,” says Rockefeller Archive Center Historian James Smith. “The way we talk about and within our culture helps reflect our values – what we are about. Language is important, not understanding the language can get you in trouble,” he added.

Bernholz goes on to say in her 2008 essay “Managing for the Future: Community Philanthropy and the Next Hundred Years,” that “observations about the present state of community foundations are important, not just as a matter of placing a stake in the ground of ‘here we are’, but because they also help identify forces of change that will affect the field.”²

There are national and international support networks currently serving the community foundation field. Our challenge is examining whether a dedicated communications network could be an agile, effective, value-added proposition for community foundations worldwide?

Our common values may anchor and unite community foundations generally, but is each community foundation really so unique that we would not also have a common ‘brand’ and message to share?

Background - Existing and Emerging Networks

There are dozens of existing, well-established community foundation networks across the globe. Most serve their memberships with a broad range and varied levels of services. Many have communication and marketing initiatives and services available, sometimes requiring compliance standards, along with a host of administrative and policy development supports.

Varying amounts of information and research have been carried out by many of these organizations, including in-depth analysis and recommendations related to communications and marketing. Findings are detailed in the following brief descriptions of the most well known and prominent member service organizations.

- **Community Foundations of Canada (CFC)** – This member organization serves more than 160 community foundations across Canada. Standardized marketing and messaging tool kits and resources are available to all members, and provide community foundations with messages aimed at a variety of audiences. Use is optional. CFC staff expertise is available to help any Canadian community foundation with its communications and marketing needs. A new information program, “Vital Signs”, is currently in its third year of use, as a positioning, branding and marketing piece for Canadian community foundations.
- **Council on Foundations (COF)** – member service organization representing 2,100 grantmaking foundations and corporations. Its website says it is “the voice of philanthropy” and that “the Council works to create an environment in which the movement can grow and

² Lucy Bernholz, “Managing for the Future: Community Philanthropy and the Next Hundred Years,” in *Local Mission Global Vision, Community Foundations in the 21st Century*, ed. Peter deCourcy Hero and Peter Walkenhorst, Foundation Center, 2008.

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thrive and to provide Council members with the products and services they need to do their best work". It has developed and updated marketing materials for members who must meet and maintain certain performance criteria to be able to access and use materials. It has several affinity groups working together, including CommA – the network of communications professionals that work for community foundations. CommA has a nimble and effective listserv for members, meets regularly and hosts communications-focused streams at national and international levels.

- **Transatlantic Community Foundation Network (TCFN)** – created in 1999 by the Bertelsmann Stiftung with support from C.S. Mott Foundation. TCFN represents community foundations and support organizations from Europe, North America and Mexico. TCFN provides a platform for the exchange of experience and expertise among community foundations on both sides of the Atlantic. TCFN working groups have focused on topics central to the missions and operations of community foundations including raising the visibility of the community foundation concept.
- **Community Foundation Network (CFN)** – the London-based national association connecting community foundations in the United Kingdom. A membership organization that supports the development and expansion of community foundations in the United Kingdom (UK) by providing technical assistance, training, data collection, research, marketing, financial assistance and advocacy. It also negotiates and manages national grant-making and funding opportunities on behalf of members. CFN also is working to implement national standards and manage a \$90 million, ten-year program utilizing government funds to work in disadvantaged communities.
- **Worldwide Initiatives for Grantmaker Support (WINGS)** – a global network of more than 140 membership associations and support organizations serving grantmakers on both sides of the Atlantic. It develops modes of communication and collaboration among and on behalf of its members. By 2006 WINGS had established a global resource fund specifically to promote community foundation development.
- **Community Foundation Partnership – Russia** – represents 16 community foundations in Russia with an aim to encourage a culture of philanthropy and encourage development of foundations, corporate partnerships and foundations and services for member foundations, including some from Eastern Europe.

Other Current Frameworks

- There are 1441 community foundations in 51 countries and four additional countries have active community foundation initiatives. This current number of community foundations reflects a 21% rate of growth globally since 2005. Approximately 26% of the total number of community foundations exist outside the USA, down from 40% in 2005.³
- New trends have emerged. According to the latest Community Foundation Global Status Report from WINGS⁴, there is more cohesiveness in the community foundation structures as

³ Wings Community Foundation Global Status Report – 2008.

⁴ Wings Community Foundation Global Status Report – 2008

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the number of community foundations grow within countries, and they share their experiences through in-country membership associations and across borders.

- New activity has been strong in southeastern Europe. There is also more 'organic growth'- from the bottom up – coming from initiatives of individuals, especially in countries or regions such as the Middle East where there are no organizations to support the development of community foundations, the summary states.
- For example, Turkey's first community foundation was created in 2007 as the result of one American donor wanting to make a large philanthropic gift back to his homeland. There was no mechanism present to easily make the gift, nor was there a structure available to ensure the donor's philanthropic desires could be achieved. Through a collaboration between an existing Turkish organization (TÜSEV – Third Sector Foundation of Turkey), the donor and, the Turkish Philanthropic Fund (TPI), facilitated by the CUNY Center on Philanthropy and Civil Society and TCFN, and with the support of the donor's positive experiences in America with a community foundation, the collaborators were able to not only receive and direct the donor's gift, but also to move Turkey onto the international community foundation stage. The first Community Foundation in Turkey, Bolu Bagiscilar Vakfiin, was legally registered in early May 2008.

Gaps

Some areas of the world are underserved or not represented by a community foundation support network. Many of these regions are new or emerging in the community foundation field and have yet to have organizational supports in place to serve their cf. Many regions have tried a member service approach without the success or collaboration enjoyed in other regions.

For example, **in Africa**, the South Africa Grantmakers Association (SAGA) disbanded after several years of attempting to work together, identifying a number of 'context-based challenges and issues', the first of which was the understanding of the community foundation concept. With 10 of the lead community foundations in the country part of the SAGA network, membership still failed to gel and develop common practices, policies and governance, community messages, understandings and collaborations. As a result the organization disbanded and currently there is no membership organizational support, such as SAGA, for grantmakers in Africa.⁵

In Asia, the community foundation concept is emerging. Support organizations do not exist in a formalized membership group. Collaborations grow out of venture philanthropy initiatives and micro lending programs at the grassroots level of community development initiatives.

In Eastern Europe, new member organizations are being created to serve the emerging and growing community foundation field. As mentioned, in Russia, the Community Foundation Partnership includes 13 founding community foundations in its membership. The organization was created to: promote the community foundation concept, with a focus on donor stewardship and recruitment; promote collaborations with government; and help the established and emerging foundations share experiences and learn from each other. In Poland, the Federation

⁵ Case Study by Max Legodi, SAGA and Diane Leat, consultant to WINGS-CF, 2001.

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of Polish Community Foundations, formed officially in March 2008, represents more than half a dozen new community foundations throughout the country.

In South America, the community foundation concept is just beginning to take hold. According to an article in *Alliance* magazine, the community philanthropy organizations in Brazil have created a new paradigm for corporate citizenship by taking part in training programs in institution building and the management of community-based organizations. This new kind of corporate community philanthropy suggests organizations are progressively becoming part of these revised versions of the traditional community foundation and are becoming active partners in community life, according to the March 2006 article.⁶

Each of these organizations and/or geographic regions have acted independently, collaborated some with other community foundations and worked to help promote the community foundation concept in their areas. Although collectively they share core values, there is no identified cohesiveness to common messaging, promotions or marketing of the community foundation concept or function overall.

An additional communications consideration asks how can community foundations, in their quest to be seen and understood globally, be the knowledge portal for *all things community foundation*? Whether an emerging community foundation in Russia or a mid-size foundation in Italy –could such a community foundation ‘hub’ of best practices, common messages, list serves, ideas to share and expertise to access be created, maintained and available via the internet? New technology will bring new opportunities for connecting and collaboration.

Why Marketing is Important

The concept of marketing community foundations embraces the idea that with common broad messages and a visual identifier, the movement could start to place itself in the hearts and minds of communities globally. The concept of marketing does not determine, in this context, specific marketing messages, but it makes the case for developing these and the benefit to community foundations of this approach.

A scan of activities to date in the area of brand establishment and communications for community foundations revealed some work has been done. A few different committees have begun looking at how the movement could share messages, as well as the importance of promoting the concept worldwide. These efforts, although detailed, have not moved forward on the international stage. Some have included detailed marketing messages and plans with analysis and others have conceptually identified the need for work in this area.

According to Peter Walkenhorst, Program Director for community foundations at Bertelsmann Stiftung (a private foundation in Germany that develops model solutions), there is an opportunity for broad global messages that could be effective in helping to position community foundations worldwide. Some community foundation networks have undertaken initial investigation and planning around marketing of community foundations. A 2006 position paper on Community

⁶ Marcos Kisil, “A New Paradigm for Corporate Citizenship,” *Alliance* Vol 11, March 2006.

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Foundation Marketing by Donnell S. Mersereau, from the Council of Michigan Foundations, researched need and identified potential process to start work in this area.

In the paper, Mersereau says marketing begins with understanding – helping audiences to better understand you, and you to better understand your audience. For community foundations, this has always been the challenge. Community Foundation communications staff often say we are a complicated business and explaining what we do is complicated. If the argument is to be made for a simplified approach and some broad, uncomplicated messages, the start must be with an agile and supportive approach, based in creativity and responsiveness, rather than top heavy regulation and process. Collaboration is essential – nimbleness and timely responsiveness – critical to success.

Finding Our 'Brand'

Most community foundations have a variety of audiences. Finding our 'brand' is more than marketing messages used to promote a concept. Our 'brand' is who we are and who we want to become. The marketing activity is just one piece of the branding puzzle. The key to a global marketing strategy lies in creating simple messaging that transcends and connects with all community foundation audiences. For example, a visual symbol, used worldwide, could anchor the messaging and become the trusted identifier for all levels of philanthropy – local, regional and international philanthropy.

Community Foundations of Canada recently completed a year-long examination of its collective message and 'brand'. This exercise and process could be the model for a similar global initiative aimed at reviewing, developing and delivering a global community foundation brand through an accessible communications network and an online resource portal.

Several community foundation networks already recognize the need and advantage of a community foundation brand. Many are working towards these goals within their own structure and activity but not with a global vision. The NMAT marketing materials, originally created by COF half a decade ago for its standard-compliant members, have also been adapted and incorporated by members of CFC and TCFN. Some of the materials have also been translated for use in a variety of world markets. These messages can be effective when directed at specific, target audiences and focused on particular community foundation initiatives and relationships, but they do not position the community foundation movement overall at the global level.

A task force structure, drawing membership from communications staff within existing community foundation networks, could work together to create, develop and deliver an effective and recognizable 'brand' for community foundations worldwide, including a roster of broad, common messages and a visual identity.

Emerging and well-established community foundations alike, supplied with the creative resources, could easily incorporate common visual identifiers and messages into their everyday work. Whether in San Paulo, Brazil, Moscow, Russia or Turin, Italy the community foundation

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symbol would be a recognizable beacon and access portal for community philanthropy, leadership and expertise.

As the messages and visual identity pieces became more common place and recognizable, the message of community foundation would grow – respective of activities and partnerships in any geographic area.

Technology's Role

Promoting the community foundation concept and message is not easy. Technology and all its ongoing advancements can help carry and distribute the message to community foundations and also to the worldwide marketplace. The timeliness and effectiveness of this type of communication venue has labeled the internet 'the power tool of philanthropy'. Keeping up with all the technology and related opportunities is a full time job for most organizations. For individual community foundations, and for community foundation marketing and positioning worldwide, the challenge will be to use the right tool for the job at hand to reach the intended audience.

Peter Hero says that in addition to the many existing international intermediary organizations, technology is rapidly being developed to better connect donors in first-world countries with charities in third-world countries.

"This technology makes it easier for community foundations to link up with donors, charities and each other. And while it has long been possible to donate money online, it is also now possible in many countries to use mobile phones to text-message modest individual donations to causes and charities. The potential is great. In America alone more than 83 percent of all households have at least one mobile phone."⁷

Although specific technological advances cannot be predicted with much certainty, it is certain there will be developments and new technology through methods we have yet to imagine. Leaders across every sector point to mobile communications and digital media becoming common place.

Further into her essay on philanthropy in the next century, Bernholz goes on to recommend the community foundation movement get busy managing for the future if it wants to stay relevant and have ongoing success. Establishment of the WINGS Global Fund in 2006 was a deliberate move to promote community foundation development, not to promote community foundations in the philanthropic marketplace.

"The best we can do is imagine the directions of change that these trends might hold for community philanthropy. For example, it is likely that the expectations of immediate access, global reach and instantaneous transaction times that communication technologies have

⁷ Peter deCourcy Hero, "The 21st Century; Towards a Global Vision," in *Local Mission-Global Vision, Community Foundations in the 21st Century*, ed. Peter deCourcy Hero and Peter Walkenhorst, Foundation Center, 2008.

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enabled will continue to spread. More and more communities once isolated by geography and/or poverty will be brought 'online' and the members of those communities drawn into the global knowledge and information flows," Bernholz said.⁸

Many community foundations are already using 'new' technology to reach their audiences. Blogs, podcasts, online grant recommendations, secure donation capabilities and 'e-wire' instant communications are putting all of us in touch immediately with our many publics.

The community foundation messages can be tailored, time-sensitive and 'twittered'⁹. Podcasts can connect donors with charitable activity and vice versa. Charities are outpacing business in using social media and online donors give more, more regularly.

Risks

The challenges of creating, maintaining and promoting messages which do the same for the community foundation worldwide network does pose an inherent amount of anticipated risk – mostly related to time sensitivities, translation challenges, effective coordination and evaluation mechanisms.

Steve Mittenthal, President of the Arizona Community Foundation and a member of TCFN working committee on marketing of community foundations, also warns that community foundations should proceed with caution as they consider raising their visibility.

"In the final analysis, the test of a community foundation's worth is not how loudly and widely it trumpets its messages but rather how well it delivers on its core promises: to promote philanthropy, to connect donors' passions to the long-term work of thoughtful giving, and to use all of its resources in the building of a strong, caring and just community," he said.¹⁰

The Global Fund for Community Foundations is also looking at opportunities to help establish international communications networks for CFs. Wings Global Fund Program Manager Vadim Samorodov says the key to creating and maintaining an internationally-focused communications and marketing initiative is momentum and interest.

"I've been a part of several networks and experience shows that such networks work when each participant is personally/organizationally interested. The important part is when the personal interest moves towards organizational interest of building alliances and collaborations," he added.

A recent TCFN survey on visibility showed "helping community foundations become better known and understood by the people and organizations that are important to their success"

⁸ Lucy Bernholz, "Managing for the Future: Community Philanthropy and the Next Hundred Years," in *Local Mission-Global Vision, Community Foundations in the 21st Century*, ed. Peter deCourcy Hero and Peter Walkenhorst, Foundation Center, 2008.

⁹ Twitter – a free social messaging utility, www.twitter.com.

¹⁰ Steve Mittenthal (President Arizona Community Foundation), "Raising Visibility – Proceed With Caution, TCFN Monograph, (no date): www.tcfn.org/marketing&visibility.pdf.

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rated a '4.5 out of 5' from members. The raising of visibility – especially if one is clear about one's audience – is important, desirable and even necessary.

What a Global Communications Network Could Look Like

Opportunities

Some work on potential communications activities has been done to date by a number of national and international networks. The focus for much of this work has been on recognizing need and looking at ways of promoting the concept of community foundations. Collectively, we are poised at this juncture in community foundation growth and development to assess communications work to date, to identify our global brand and to develop broad marketing messages for and about community foundations.

As an expanded global communications development for community foundations, an internet portal should be created and marketed to share current community foundation information, best practices, resources (including brand tools and broad marketing messages) from around the world in one accessible and efficient location. Currently, existing member organizations do gather and post information relevant to their membership on their respective websites. A streamlined approach would drive information seekers to a 'one stop shop' with detailed resources available and applicable for any particular region, issue or challenge.

The opportunity to create, nurture and support community foundation marketing activities and informational needs worldwide flies in the face of the common descriptor "if you've seen one community foundation, you've seen one community foundation." This statement, routinely bandied about amongst most community foundations, does reflect the unique circumstances and neighbourhoods we all operate within. It fails to acknowledge that, although we are often diverse in our regional or national market and activities, we are all connected through our core values and aspirations.

Recommendations

1. Brand, marketing and global messages

An international task force, engaging representatives from each national member organization, could be created to carry out a branding exercise for community foundations globally. A structured review and examination of related activities to date should be undertaken and documented with findings to include a list of 'next steps' for the task force, including potential brand activity (i.e. marketing messages, look and positioning), tracking, evaluation and effectiveness measures, etc.

A workable and effective timeline for the task force activities (12 to 18 month schedule) will communicate commitment, agility and responsiveness to and for the community foundation movement. Funding for this task force's activity could be supported by all member-based organizations and individual community foundations participating, but perhaps the most natural

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next step for the WINGS Global Fund would be to support this proposed task force and the suggested activities.

2. Global Resource Portal/Communications Network

This paper is proposing that as part of this meta community foundation activity, current and emerging documents and best practices would become part of the global resources portal. An overall coordinator of the site would be responsible for its maintenance and upkeep, recruitment of current documents and other resources from community foundations existing networks, researching new and innovative approaches for use by the community foundation movement and coordination of emerging opportunities for collaboration and sharing of ideas, information and technology. Member national networks would feed/post relevant information which would be accessible to all.

This activity could be coordinated through the existing international network of community foundations or a new position, a hybrid of others, could be created to manage the new resource. A detailed overview, design and structure of such a portal would be part of the communications task force activities.

In Closing

Community foundations must position themselves collectively as the 'recognized and respected' voice and face of community leadership, knowledge and expertise and the future of philanthropy – locally and globally. We can succeed if we consider and create new ways of harmonizing the community foundation voice. Our working landscape is crowded with more and more organizations and corporate entities wanting to 'stake their territory' on the philanthropic map.

Collaborative relationships amongst members, volunteers, staff and other organizations that respect independence and diversity, that foster dialogue and sharing of ideas and experiences are a powerful catalyst for strengthening communities around the world.

Creating new networks, refining existing networks, and generating new ways of approaching our challenges and opportunities will ensure that the sector and those we serve will continue to embrace new and innovative approaches for our world, our communities.

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