



## Connecting the Missing Link

Bringing Together Global Philanthropists and  
Global Community Philanthropy Organizations

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# Executive Summary

Individual philanthropists and community foundation leaders from around the world came together to learn about and understand the potentially transformative benefits of forming partnerships to address societal problems. Synergos' long history of recognizing the value of community foundations and working successfully with both community foundations and philanthropic individuals and families stems from its commitment to eradicate poverty and inequality by developing infrastructure to mediate between the poor and those with resources. As noted by Peggy Dulany, Founder and Chair of Synergos, "community foundations are the infrastructure through which a sense of ownership, obligation, partnership and collegiality derives and is the ideal place to begin to engage in a consultative, partnership process."

The project completed three distinct phases:

1. Research and Planning
2. Core Phase
3. Project Findings, Recommendations and Dissemination

The Research and Planning phase of the project gathered information through surveys, individual and group conversations with international leaders of community philanthropy organizations (CPOs) attending the conference of the Community Foundations of Canada in 2011, and a diverse Advisory Group.

The key activities of the Core Phase included:

- A face-to-face focus group of philanthropists and community foundation leaders from Asia, Africa, Europe, North and South America, and the Caribbean.
- Four Synergos-led regional gatherings in Brazil, South Africa, Mexico and the United Kingdom.

Supplementary activities of the core phase included:

- Hosting a breakfast roundtable at the international gathering of the Global Philanthropy Forum
- Synergos Learning Journeys in India, Mexico and Brazil that integrated learning about community philanthropy and site visits for several groups of individual philanthropists. The India gathering also featured Synergos Founder' as the central speaker of a gathering of more than 70 Indian philanthropists in Mumbai, and introducing them to the concept of community foundations.
- Individual and small group meetings of international community philanthropy leaders and leaders of infrastructure groups and funders at the final Fall Conference of Community Foundations hosted by the Council on Foundations.

Meeting participants held frank and constructive conversations and explored opportunities and challenges of working together. These meetings helped to achieve the following goals:

- Raised awareness among individual philanthropists of the existence of local community foundations as effective local philanthropic partners
- Strengthened the capacity and confidence of community foundations in their interactions with individual philanthropists
- Documented advantages and disadvantages of working together, perceived barriers, and potential ways to address those barriers
- Connected individual philanthropists with existing community foundations in their communities of residence and the regions of their philanthropy
- Presenting the benefits of achieving philanthropic and community foundation goals by learning and partnering with one another to general meetings of Synergos' Senior Fellows and members of the Global Philanthropists Circle.

The regional gatherings served a second, very important goal not necessarily evident to the participants, but intentional by project organizers. Synergos introduced its *Ten Lessons on Multi-stakeholder Partnerships* (available at <http://syngs.info/sa10>) as the underlying text of the regional meetings. This document exposed both groups to a new way of thinking and acting collaboratively. Participants agreed that the knowledge gained from the discussion of the Ten Lessons was a valuable take-away from the gatherings, as well as a way forward for community organizations and philanthropists to work together in their local communities.

Philanthropists and community foundation leaders participated in the following Synergos-organized meetings:

- *New York, May 2013, Kick-off Focus Group*: Seventeen participants working in Australia, United Kingdom, South Africa, Haiti, Mexico, United States, Brazil, China, Czech Republic, and Zimbabwe
- *São Paulo, Brazil, November 2013, Regional Discussion*: Sixteen participants working in Brazil, Uruguay, Mexico, United States and Portugal
- *Cape Town, South Africa, March 2014, Regional Discussion*: Twelve participants working in South Africa, Namibia, United States, Zimbabwe, and United Kingdom
- *Guanajuato, Mexico, March 2014, Next Generation Learning Discussion*: Next generation philanthropists participated in a site visit to a community philanthropy organization in Mexico
- *Ascot, England, October 2014, Regional Discussion*: Eighteen participants working in the United Kingdom, Netherlands, Czech Republic, France, Belgium, Ireland, United States, Egypt, and South Africa.

The New York focus group set the stage for the ensuing regional discussion groups as participants expanded and compared opportunities and challenges to their own regional situation or location.

The meetings not only introduced philanthropists to community foundation leaders but also served to strengthen the knowledge and skills of these leaders in their interactions with donors.

The following list of opportunities and challenges synthesizes and documents the outcomes from all meetings and offers highlights from particular meetings:

## **Opportunities**

### *Building the field of philanthropy*

- Creating the awareness of and infrastructure for philanthropic investing and giving
- Building the field through structured relationships
- Documenting ways to enter into and engage with communities
- In South Africa, viewing philanthropy as a means to support development priorities as international funding decreases
- In Mexico, tapping the resources of universities to stimulate young philanthropists

### *Extending reach into local communities for philanthropists*

- Mediating questions and understandings of cultural competency
- Ensuring a more inclusive and appropriate philanthropic intervention
- Having the capacity to vet and verify locally

### *Developing Bridging Leaders*

- Recognizing the value of long-term relationship building, inclusiveness, and listening

### *Creating vehicles for partnerships*

- Recognizing the value of community ownership
- In South Africa, creating co-investment opportunities

### *Working jointly on measuring impact*

- Deciding together on indicators of success

## **Challenges**

### *Bridging cultural differences between individual philanthropists and CPOs*

- In South Africa, understanding the difference between “cultural traditions” worth preserving and those that are not
- Understanding the difference between philanthropists’ needs for short-term results vs. community needs for long-term investment

### *Conflicting ideas of who owns the agenda*

- Difficulty of co-creating vision and agenda
- Person-to-person communication and trust building

### *Transcending uneven power dynamics and levels of knowledge*

- In England, finding political leaders willing to lead on social issues

- In South Africa, confronting the reality of weakened communities with sensitivity to memories of colonization

#### *Finding common language and action between philanthropists and local groups*

- In Brazil, surmounting wide terminology gaps between the groups
- Overcoming incompatible visions and agendas
- Bridging conflicts between who owns the giving process and who controls the agenda
- In South Africa, defining efficiency through making effective connections and spending wisely
- Recognizing the significance of tangible and intangible results

#### *Building a field of philanthropy*

- Organizing communities to participate when they lack social capital or social cohesion
- In Brazil, Mexico, and South Africa, stressing that neither the field of philanthropy nor the community foundation movement is well established

#### *Finding bridging leaders*

- Gaining knowledge of who has the capacity and the local trust to lead.

In three regional meetings, Synergos shared the *following Ten Lessons for Multi-Stakeholder Partnerships*. Key remarks from the participants are in italics:

1. Go it alone if you can.  
*Not all problems require a partnership*
2. Start-up is half the battle.  
*Find those with political will who can issue the “local” invitation.*
3. Do your homework.  
*Conduct research and analysis on situations/stakeholders and design well-conceived business plans.*
4. Find the Bridgers.  
*Search all sectors, but for complex issues the government must be involved.*
5. Let go.  
*Knowing when to let go of hardened beliefs is an essential skill.*
6. Engage the community.  
*Recognize that communities are more familiar with their needs and expectations than outsiders.*
7. Envision scale but start small.  
*Starting small can achieve a “quick win” that increases the morale to tackle the larger, more complex issues.*

8. Work multiple levels simultaneously.  
*Pay attention to all levels to ensure broad-based systems change.*
9. Shift the institutional arrangements.  
*Systems change can require creation of new institutions responsive to citizen needs.*
10. Measure the tangible as well as the intangible.  
*Recognize that poverty is not fixed only by money.*

The third and final phase of the project is this report, which includes findings and specific recommendations for further progress in bringing together philanthropists and community foundations. The Executive Summary of this report was initially distributed to international and domestic CPO participants at the annual conference of the Council on Foundations in April 2015. An add-on dissemination activity brought together a dozen U.S. philanthropists who are giving internationally with Emmett Carson, CEO of the Silicon Valley Community Foundation, to discuss ways that community foundations around the world are accommodating the international interests of their donors.

Dissemination of this report in English, Portuguese, and Spanish via the web will expand knowledge about the project and its findings and further the discussions about important next steps.

# Introduction

In May 2011, the Charles Stewart Mott Foundation awarded the Synergos Institute an initial grant of \$150,000 for the first two years of a four-year project to bring together individual philanthropists and community philanthropy leaders and their organizations to jointly address societal problems. The initial phase focused on research and planning as well as the introduction to the Core Phase. The second award, in 2013, of \$200,000, enabled completion of the Core Phase II and a final Findings, Recommendations, and Dissemination Phase, or Phase III. This final report covers all phases of this groundbreaking project.

Synergos' long history of recognizing the value of community foundations and working successfully with both community foundations and philanthropic individuals and families stems from its commitment to eradicate poverty and inequality by developing infrastructure to mediate between the poor and those with resources. As noted by Peggy Dulany, Founder and Chair of Synergos, "community foundations are the infrastructure through which a sense of ownership, obligation, partnership and collegiality derives and is the ideal place to begin to engage in a consultative, partnership process." This project both increased mutual awareness and explored opportunities for interconnection and understanding between both philanthropists and CPOs. It has also initiated a "chain of trust" between them that will continue to grow.

## Phase One: Research and Planning

To begin to develop greater mutual awareness and understanding between philanthropists and CPOs and to explore opportunities for interaction and partnership, Synergos' breadth and depth of contacts with members of both of these groups insured unique access and response to surveys and personal requests. It also guaranteed enthusiastic attendance and participation at gatherings designed to bring both groups together.

During this initial phase, the project accomplished the following key activities:

- Assembled a first-rate, diverse Advisory Committee representing both groups. Used primarily in the planning stages, the advisory committee members enthusiastically supported the need for the project, identified future participants for the regional meetings and other activities, and advised Synergos' personnel on the overall direction of the project through conference calls. As individuals, they were consulted throughout concerning issues relating to particular regions or particular facets of the project.
- Completed the first-ever survey of a sample of global philanthropists on their knowledge of and involvement with CPOs, and the first-ever survey of sample of community philanthropy organizations on their knowledge and experiences of working with global philanthropists.
  - Twenty-nine individual philanthropists (primarily but not exclusively members of Synergos' Global Philanthropists Circle (GPC) responded from 15 countries on



every continent. These respondents targeted their philanthropy to 17 countries or regions. Almost four-fifths were familiar with the concept of community philanthropy, and over half had partnered with a CPO in some way. Most commonly, the philanthropist used the CPO to pass through funding to support a particular project or organization in the community served by the CPO. Six of the respondents provided financial support for the CPO, and four established a fund in a community philanthropy organization. Two thirds indicated interest in learning more.

- Of the 43 Synergos Senior Fellows surveyed, 25 from 13 countries representing every continent responded. Two-thirds of the respondents indicated that they worked directly with individual philanthropists primarily through collaborative support of a specific local project. Just over half received financial support from individuals, and the amount of this support ranged from under 1% to 100% of their revenue with an average of 23%. Two-thirds requested more information.
- The follow-up for both groups resulted in invitations to participate in a May 2013 focus group meeting that initiated conversations of shared learning.
- Co-hosted a joint Breakfast Table Talk at the Global Philanthropy Forum on “Community Philanthropy” with the Charles Stewart Mott Foundation and the Global Forum for Community Foundations. This event introduced the project to key players in the philanthropic and community foundation arena.
- Held individual and group conversations with international CPO leaders attending the conference of the Community Foundations of Canada.

## Phase Two: Core Phase

The Core Phase consisted of a series of activities designed to bring together and build understanding between individual philanthropists and community philanthropy organizations. Primary among these were a global, in-person focus group of individual philanthropists and CPOs from around the world, and four regional gatherings in Brazil, South Africa, Mexico, and the United Kingdom. In addition, Synergos also created or participated in several supplementary opportunities to build understanding and learn from the two groups.

### Worldwide Focus Group

In May of 2013, Synergos hosted a focus group meeting of 18 philanthropists and community foundation leaders in New York. Although the project originally intended to take advantage of gatherings of other philanthropic groups to bring together the two groups, the scarcity of these types of meetings, especially in the developing world, convinced Synergos to convene its own discussions. Through this initial gathering, specific plans were laid to determine the activities and focus of the final years of the project.

The meeting documented the opportunities and challenges of working together, the perceived barriers, and potential ways to overcome these barriers. The meeting's observations were used as the basis for discussion in the regional meetings that followed.

Participants focused on three major areas of agreement on how CPOs could expand the impact of individual philanthropy:

- *Extending Reach Into Local Communities:* CFs/CPOs can offer essential knowledge of and connection to local communities. One philanthropist noted: "CPOs provide the missing link between community and donors, acting as a vehicle for identifying specific issues relevant to that community. Philanthropists also spoke of the CF's role in "mediating cultural competency." For donors who are not intimately familiar with the communities in which they focus their philanthropy, the CPO can "help to interpret for the donor the local community/NGO culture." Community foundations can also be invaluable brokers in establishing community ownership and be a means of accessing local knowledge and connections. They can "help mediate meetings with important stakeholders who would not normally meet with philanthropists." Their skills and expertise in "bridging capital," bring together "those with dissimilar views and from different sectors." One philanthropist said that community foundations can "extend my reach." Another commented, "If community institutions – i.e., CPOs – did not exist, philanthropic resources could not be effectively utilized to effect change and address social justice, because individual philanthropists would not alone be able to understand or access that space."
- *Vehicle for Partnerships:* Community foundations were viewed as critical institutions for building partnerships among various stakeholders to address long-term development issues. In several instances, notably Mexico, Australia and the United Kingdom, community foundations serve to attract public (government) funding for community development needs. Many of the philanthropists particularly valued this role as it offered excellent leveraging opportunities. They also mentioned that CFs can bring together many philanthropists and other donors to address short-term/immediate (e.g., natural disasters) or long-term needs. One participant said the CPO "can identify a specific issue with a specific set of goals, and then facilitate" a group of donors to address it. In one example, the community foundation amalgamates local development funding from different sources – government, community, individuals, and companies – into a single development project.
- *Engagement, Education, and Innovation:* Community foundations were seen as the place where donors can be engaged and educated and learn of innovative practices in philanthropy. Community foundations are "educators which provide opportunities for people [i.e., philanthropists] to learn." They "encourage engagement." Donors were described as often "doing their own thing", but it is essential for CPOs to connect with them to initiate potentially successful partnerships. Community foundations also

introduce innovations such as giving circles and impact investing to philanthropists, and were seen as having a particular role in engaging the next generation. Said one philanthropist, “Community foundations can be a beacon, a center for gathering.”

The participants recognized that despite the expressed good will, there are a number of barriers to working together. Surprisingly, the focus group revealed that regardless of geography, culture and history, philanthropists had a great deal in common with one another, speaking the same language and reiterating similar points. The same was true of community philanthropy organizations. Despite regional differences in culture or services, individual philanthropists shared a common understanding and belief set. The larger divides existed between philanthropists and CPOs.

The most prominent divides were ownership, vision, and agenda setting. The CPOs generally did not view individual donors’ visions and agendas as being the same as - or even compatible with - the community’s vision and agenda. In fact, CPOs used phrases such as “ego-driven,” “immature,” and “lacking respect of minorities and indigenous people” in their descriptions of working with individual philanthropists. For their part, the philanthropists at the table believed that CPOs “lack self-confidence,” “lack business expertise,” and “don’t understand the donors’ need for efficiency and accountability.” They felt that there is “not enough documentation” of impact, and that “CPOs are not telling their stories in a way that all can understand.”

The barriers did not prevent a useful discussion of identifying solutions. A Chinese philanthropist voiced a sentiment stated by many others when he offered a business relationship analogy. He said it is necessary to “get to know one another, make initial compromises, and then you can do more creative projects together. CPOs need to understand donors’ need for efficiency, and donors need to understand community needs.” Other general ideas included “the importance of joint ownership,” “balancing community priorities and donor priorities,” “educating donors on community needs,” “complementing the diversity of donors,” and being “mission-based rather than ego-based.” Specific recommendations included:

- Communication and training – “working toward a common understanding of society for the entire field”
- Mediator/translator role – “talking both languages, encouraging dialogue, understanding the same language”
- Education both ways – CPOs need to understand how the donor side works, and donors need to understand the different profiles of CPOs
- Expanding field building in-country with grassroots organizations; increasing the confidence of donors in the CPO and NGO sector

The organizers agreed that the task of encouraging philanthropists and CPOs to work together did not center on technical issues such as tax laws and specific types of services offered, but rather on the “softer” issues of educating, engaging, and building communication, trust, respect, and

understanding. This meeting set the agenda for discussion at the regional meetings of philanthropists and CPO leaders.

The last two years of the Core Phase focused on two primary goals: 1) convening regional meetings of philanthropists and CPO leaders to raise awareness of the existence of community foundations as effective local philanthropic partners; and 2) transferring knowledge and skills of “Bridging Leadership” to the participants. Synergos also planned to match individual philanthropists with community foundations to initiate partnerships between them. However, Synergos found that, with few exceptions, the geographic interests of donors did not coincide with the geographies currently served by CPOs.

Analysis of the reach to individual philanthropists and CPO leaders through introduction and discussion at external philanthropic and community foundation meetings in the early stage of the project led Synergos to conclude that organizing internal meetings would offer a more comprehensive result. Thus, beginning with a focus group meeting in New York in May 2013, Synergos organized regional gatherings in four key geographic areas: Brazil, Mexico, South Africa, and the United Kingdom. Each region was selected because of a critical mass of both individual philanthropists and CPOs, and the depth of social capital of Synergos in each region.

Central to the potential successful relationship between CPOs and philanthropists is learning how to succeed together. Synergos’ October 2012 report on *Ten Lessons on Multi-stakeholder Partnerships* (available at <http://syngs.info/sa10>) provided the basis for training on how to develop the “capacity to make it possible for people to come together across divides and work as partners.” Each regional meeting included discussion of the ten key lessons and related those lessons to practical work and challenges. Specific comments about these lessons from particular regions are included in the *Lessons Learned from Working in Multi-Stakeholder Partnerships* section of this report.

Significantly, the discussions provided the opportunity for invaluable face-to-face conversations that examined the benefits of partnerships to achieve common goals. In addition, the ability to discuss and learn from failure with one another proved to be an excellent learning tool.

## **Regional Meetings**

### ***Brazil – November 2013***

Attended by philanthropists and CPO representatives from Brazil, Uruguay, Mexico, Spain, and Portugal as well as the United States, the discussion benefitted from the key points of the New York focus group meeting by placing them in the Brazilian and Latin American context. Despite general agreement with the New York focus group conclusions, it seemed to participants that a more basic challenge is that neither the field of philanthropy nor the community foundation movement is well established. The non-profit sector, in particular, suffers from a long-term lack of credibility exacerbated by divisive language and expectation gaps between the sector and local business and philanthropic donors. Donors have high expectations, and neither side understands

the language or terminology used by the other. For example, the entrepreneurial or business language of philanthropists differs from the “softer” language of the third sector.

The participants discussed two primary barriers to closing the gaps: 1) the scarcity of leaders who can understand and “bridge” these spaces; and 2) the inability to communicate effectively between sectors. Participants acknowledged the need for key figures or institutions “to act as bridges between traditionally unrelated communities.” Parties may agree on one overall, general goal but fail to understand each other’s point of view on how to achieve that goal. For bridges to be built, it is necessary to agree on the urgency of the task at hand despite differences of style and approach. As one participant noted, “We speak differently, and we dress differently, but we do have shared goals.” Bridgers or intermediaries are needed to facilitate this general understanding and to assist with careful delineation of what steps are necessary to achieve the goal successfully.

Fundamental to this effort is to increase the ability of parties to communicate between sectors. Participants were adamant that “we just don’t know how to communicate, whether it’s with partners or funders, and this is a major challenge in our sector.” Inability to communicate is tied, as one participant suggested, to the “asymmetry of power” between sectors. If the community and its representatives perceive themselves as not possessing equal power, or if the philanthropists believe the CPOs do not have equal power and/or credibility, a genuine dialogue is difficult to initiate and even more problematic to sustain.

Distrust of the non-profit sector hinders giving, but the culture of philanthropic giving itself is weak in the region. The meeting in Brazil echoed the suggestions from the New York focus group meeting in which participants asserted that CPOs must begin to understand donors’ need for efficiency and timeliness while donors must work to develop a deeper and more nuanced appreciation of community needs. In Latin America, however, placing the issue in the appropriate regional, cultural context is essential.

Despite the distrust between sectors, however, the participants agreed that CPOs could be the initiating entities to develop bridging leaders because of their capacity to convene diverse populations. Thus, building a culture of philanthropy with input and cooperation from both sectors was viewed as an opportunity and a challenge for the group.

#### ***Mexico – March 2014***

In March 2014, Next Generation philanthropists participated in a site visit to a community philanthropy organizations in Guanajuato, Mexico and the projects it supports. As in Brazil, the culture of philanthropy and the strength of the non-profit sector are not well established in Mexico. Introducing young, future philanthropists and university students to the benefits of community philanthropy offered them important insights into their roles and choices as future donors. The participants discussed the following topics:

- Defining a community foundation and civil society
- Learning how community development can work

- Promoting philanthropy through community foundations
- Understanding philanthropic purpose
- Developing next generation leadership
- Learning the diversity of philanthropic and community foundation contexts
- Valuing potential partnerships with community foundations; and
- Tapping the resources of universities to stimulate young philanthropists.

The site visit not only exposed the young philanthropists to these concepts but also underscored the significance of programs in which understanding, education, engagement, and trust between civil society and donors are effective tools for future partnership. The participants emphasized the need for continued follow-up activities and communication to propel both sectors into meaningful and long-term commitments. Follow-up activities suggested included: creation of a NextGen Alumni group, electronic newsletters, blog and twitter accounts for the group, and periodic meetings between donors and non-profit organizations.

#### *South Africa – March 2014*

In March 2014, twelve participants working in South Africa, Namibia, the United States, Zimbabwe, and the United Kingdom attended the regional meeting in Cape Town, South Africa. The facilitators shared the results of the New York focus group, which were then discussed in the African context. In contrast to the stated difficulty in Latin American of building the culture of philanthropy, the participants noted that the culture of giving exists in Africa, but the field of philanthropy does not. There is an insufficient “structured relationship” between donors and communities to clarify the necessary steps to build “community philanthropic practices” even when the ultimate goal is agreed upon. In Africa, the goal is very basic: “to make societies function.”

The participants noted a number of additional challenges particular to the African context. Building a field requires “long-term investment in relationship capital” which must address the problem of “non-functioning communities” and the “delicate nature of working with people in transition.” Building relationship capital, the participants admitted, is a relatively rare commodity in philanthropy, and it is made more difficult by the legacy of colonialism and the resulting lack of trust of outside donors. Communities are rightfully leery of knowledge from “elsewhere.”

At the same time, communities “in transition” present their own challenges. A current sense of entitlement among citizens who rightfully demand clean water, decent housing, and good health care continue to presume that government, overseas development aid, and other external forces will provide. There is scarce understanding of or commitment to developing and using their own assets.

For the meeting participants, the question that arises is “what makes philanthropic giving qualitatively different from aid or international development agencies?” How can communities engage equitably with donors to achieve the overall goal of functioning societies? The answer is the “people-to-people contact,” and the quality of the relationship. For philanthropists, the latter

will not develop without their understanding of the distinction between solidarity and paternalism. For CPOs, it requires careful development of a constructive relationship as it “takes time to break down barriers” created in part by previous development interventions. Barriers are also created by “cultural” traditions that may not currently serve the human, social, and economic development needs of local populations. Participants commented that the issue of cultural competency raised in New York requires careful deconstruction in communities bound to outdated or harmful constructs. Yet participants agreed that finding opportunities to “co-invest” with external parties offers the most promising avenue for development.

Philanthropists in the meeting recognized CPOs as a necessary and valuable asset to giving constructively and successfully. Yet, for them, constructive also means giving efficiently, and the Northern/Western definitions of efficiency are insufficient in this cultural context. Bridging the culture and understanding one another as both sectors seek to “co-define efficiency” requires a multi-layered and multi-faceted long-term approach. This approach acknowledges the critical importance of intermediary organizations in the developing world while assuring that they have the knowledge and skills to participate fully in their development process with their own voices. Careful documentation of best practices throughout this process will add increased value to the outcomes achieved.

#### *United Kingdom – October 2014*

In October 2014, Synergos convened the last regional meeting with eighteen philanthropists and CPO leaders in Ascot, England. After reviewing the opportunities and challenges discussed at the previous regional meetings, the participants identified opportunities and challenges particular to the European perspective.

This particular perspective derives from a more global definition of community than presented in other regions. European participants target their philanthropy and community foundation expertise not only within Europe but also throughout the globe. Europe is viewed as a place from which to spread best practices and gather knowledge and skills from diverse regions of the world. The local CPO, however, plays a valuable role as the repository of local knowledge. At the same time, the participants recognized the lower visibility and lesser resources of community foundations.

One of these best practices is impact measurement. Participants agreed that sharing understanding of what is important for long-term community sustainability helps determine what is measured and helps philanthropists recognize the value of CPOs. These organizations are the key to addressing “the what and how” of investing in a community. In addition, their leaders can be “bridgers” who have the capacity to “vet and verify locally”--an invaluable resource to external donors.

Finding the bridgers, however, is both an opportunity and a challenge. Word of mouth and “spending time on the ground” are requisite steps to initiating a partnership with the “right” leader. Without these leaders, however, the solution may not be community-owned and, most

likely, not be sustainable. European philanthropists and CPOs not physically located in developing regions do not have the local knowledge, time, and often patience to find such individuals.

The challenges included the difficulty of working in locations with no political will, finding NGOs competing with CPOs, lack of awareness of the existence of CPOs, and the credibility of leadership and board governance. The value of bridging leaders can be compromised if their work is seen as a political act to challenge the current order. At the same time, in more challenging political environments, a well-known, established, trusted CPO founder/leader can offer greater stability and trust than a struggling grassroots organization can provide.

In some areas of the world, CPOs are scarce and their establishment is limited by larger, existing NGOs that control the non-profit space. NGOs, however, may not serve the particular community required to solve a problem. Not only few in number, CPOs often do not have the larger budgets and higher visibility of NGOs, which may hinder philanthropists' ability to find them. When found, concerns about leadership capacity and board governance present additional challenges.

Participants agreed that "expanding the space for CPOs" is essential for both philanthropists and NGOs. It is especially critical to engaging and working with marginalized communities.

### **Lessons Learned from Working in Multi-Stakeholder Partnerships**

In each of the regional meetings (with the exception of Mexico), Synergos shared its ten key lessons learned from working in multi-stakeholder partnerships during its over 25-year history. Focusing on these lessons learned enriched each conversation and encouraged suggestions from the participants' own experiences.

**1. *Go it alone if you can.***

Not all problems require a partnership. When the problems are more complex, it is generally advisable to consider a partnership.

**2. *Start-up is half the battle.***

Partnerships are often developed from political will. Without an "invitation" from local partners and/or community members, the chances of success are diminished. For example, Brazil recently held a presidential election. With the uncertainty surrounding the result, and, consequently, who the government partner would be, a partnership around education is in limbo until the outcome of the election. If the government partner is no longer in power, where will the "invitation" come from? If no "invitation" is offered, does that translate to no government will?

When trust is lacking, it may be that the only way to work in a difficult political situation is under the radar. Participants discussed legitimate reasons for turning down an invitation. In some countries, it is difficult to work on issues and programs that community members - especially marginalized members - believe are right for the society.

Different agendas can prevent resource-challenged local authorities and/or unreliable local leaders from acting as trustworthy partners. It is important to know when to "walk away" from a



potential partnership. CPOs are well positioned to help donors sort through the politics on the ground and the right timing for an initiative.

In South Africa, discussion focused on the long-term nature of starting up in order to build trust. To build trust can require full investment up front in terms of money, time, and engagement for a number of years.

### **3. *Do your homework.***

Early situation/stakeholder analysis and well-designed business plans are required to properly assess whether to begin. In Europe, participants offered their experiences with research. One participant suggested researching what other foundations are working on before entering a specific area. It is often the case that those most marginalized in society are not recipients of donor funding. In Ireland, the community foundation assists local organizations by identifying expertise that is lacking on boards and finding appropriate experts to join them. This action “cross-pollinates” business and NGOs. Like many other community foundations, the Community Foundation for Ireland also produces “Vital Signs” which provides indicators of community well-being on various issues, identifies citizen priorities, and offers an excellent research tool for other potential funders.

The more difficult environment for CPOs in Africa requires a stricter degree of homework. Early stakeholder analysis must insure that all voices – especially those in marginalized communities – are heard. In addition, the level of skills and knowledge needed to engage in the necessary research and analysis of community issues and problems may not exist.

### **4. *Find the Bridgers.***

Participants in all meetings commented on the difficulty of finding bridgers. In Europe, participants noted that they may be found in all sectors, but if it is a complex issue, government must be involved. They cited examples of personal and institutional practice of developing bonds of trust. Addressing the burn-out of employees who act as sponges for community anger and conflict and listening carefully to those who may be potential partners are deeply rewarding and trust-building experiences.

In Brazil, leaders must be able to translate meaning across sectors, to build trust, to co-create with others and generate collective action. Traditional “command and control” leadership is not effective when collaboration across sectors is essential. In Africa, the participants noted that sometimes a “command and control” instruction might be needed initially to “create the space to make something happen.” Participating philanthropists noted that not all donors have the time and resources to invest in a long-term process that may not work out.

### **5. *Let go.***

Implicit in the notion of partnership is that no one person or group is dominant. In all regions, participants commented that the role of the bridge/facilitator is not to insist on what he or she believes ought to happen. Knowing when to relent and to let go of hardened positions is an essential skill. The facilitator’s ability to empathize and understand that it is not his or her agenda

is mandatory. A South African philanthropist explained that “when letting go of an idea or practice, it works best when you first strongly develop a perspective, hold it firmly, and not just let it go into nothingness, but change your perspective because you have engaged with others with different perspectives. Then you change to a different firmly held and well-developed perspective.”

**6. *Engage the community.***

Communities are much more familiar with their needs and expectations than outsiders. Bringing in outsiders may be more beneficial to the success of the project. In Europe, one participant discussed the example of working with children, their parents, social workers, teachers and business groups in the West Bank. Focus group discussions and surveys revealed uncomfortable facts about the children’s safety in schools that adversely affected their education. Because these results would have embarrassed the government, which was viewed as an important partner, the results were not released publically. Suggestions were used to create programs to build competencies among the children which all parties supported.

An important lesson for working with the community is to conduct a careful stakeholder analysis that demonstrates who the players are and who needs to be involved in the design and implementation of the program. If parties have no investment, the program has little value.

**7. *Envision scale but start small.***

Starting small can often include a “quick win” that will increase morale to address the larger, more complex issues. In Synergos’ work in Namibia, for example, health officials realized that ambulance response time was over one hour. When they discovered that ambulances were used to transfer patients rather than for emergencies, they easily fixed the problem and came together to tackle the more serious issues. In Ireland, taking risks includes finding a model that can be replicated through new, innovative projects. For example, one foundation working with IBM developed a relationship management system that increased volunteer caller knowledge of and empathy with the shut-ins with whom they interacted on a daily basis.

In the African context, particularly in impoverished communities that have experienced more project failures than successes, participants can benefit from smaller projects that lead to “recognition and affirmation.”

**8. *Work multiple levels simultaneously.***

Problems require attention at the micro, mezzo and macro levels to ensure “broad-based systems changes.” In most contexts, working across organizations has a better chance of succeeding because it is difficult to find one organization that can work at “every single level with every sector.” Finding CPOs that know and can relate to the sectors as well as understand their complexities is challenging.

**9. *Shift the institutional arrangements.***

One dimension of systems change is “institutional arrangements” or the creation of new institutions. Participants in all regions commented on the necessity of altering these

arrangements when something is not working. When institutions are not responsive to citizen needs, different institutional responses are required.

**10. *Measure the tangible as well as the intangible.***

Poverty is not solely a monetary issue. Measuring the intangible issues of dignity and respect also supply important markers of a project's success to the people on the ground. Linking small-scale projects to the larger issues of community trust can also provide meaningful measures of success. The European participants, for example, noted the practicality and importance of relieving the burdens on women, particularly in Africa, who spend up to six hours a day retrieving water. This allows them not only the time and space to go to school, but empowers them to consider other life possibilities. In Brazil, participants believed that the intangible could be made tangible, in part, by creating and supporting an agreed-upon goal that could ease the division between CPOs and individual philanthropists.

### **Other Activities of the Core Phase**

Synergos integrated community philanthropy into three Synergos Learning Journeys for individual philanthropists in Brazil, India and Mexico.

- In India, Dr. Harsha Parekh of the Bombay Community Trust acquainted 70 philanthropists assembled by Dasra with the concept of community foundations. Peggy Dulany, Founder and Chair of Synergos, introduced Dr. Parekh by emphasizing that Synergos has “achieved greater impact by partnering with local, on-the-ground community foundations.” Dr. Parekh spoke to the group about the work of the Community Trust. As a result of this interaction, she participated in the annual meeting of the India Philanthropy Forum to speak further about community foundations.
- Events in Mexico and Brazil, albeit less formal, also raised awareness among individual philanthropists about the methods in which CPOs can expand the impact of their philanthropy. The GPC Learning Journey to several sites in Mexico from 15 to 20 April 2012 brought together Mexican philanthropists engaged in social impact investment or education with community foundations. GPC member Ricardo Betancourt, a successful developer of industrial parks and buildings in Guanajuato, highlighted the work of the Bajio Community Foundation and its successful integration of private, government, civic and educational resources to improve local quality of life.
- In Brazil, Founder and Chair of the Community Foundation of Florianopolis, Dr. Lucia Dellagnelo, discussed community philanthropy with eight Global Philanthropists (from Singapore, the United States, Switzerland, and Brazil). As a member of the Advisory Committee of the Global Community Philanthropy project, and also as an advisor to the Brazilian government on education, she played a dual role by emphasizing the contributions of community philanthropy and providing expertise on the educational projects the group visited.

Synergos also presented the benefits of achieving philanthropic and community foundation goals by learning and partnering with one another at a general meetings of Synergos' Senior Fellows and members of the Global Philanthropists Circle. Overall, approximately 50 Fellows and philanthropists were introduced to the advantages of partnership. These numbers are in addition to the participants of the regional meetings and learning journeys.

Synergos introduced several global philanthropists and their staff to the concept of community philanthropy by hosting a breakfast roundtable at the annual meeting of the Global Philanthropy Forum. In addition, several individual and small group meetings of international community philanthropy leaders and leaders of infrastructure groups and funders were held at the final Fall Conference of Community Foundations hosted by the Council on Foundations to suggest the benefits of community foundations partnering with individual philanthropists.

It should also be noted that the project's goal of creating matches between individual philanthropists and CPOs proved more difficult than anticipated. Only one match was made between a philanthropist from the Czech Republic and a local community foundation to support an endowment challenge. Interestingly, this challenge was issued in part through a grant to the community foundation from the Charles Stewart Mott Foundation. The support from the Synergos project brought the individual donor into discussions with the foundation about the challenge. The donor, who did not have his own foundation structure, used the community foundation to create a donor-advised type fund for his giving and also provided assistance to strengthen the foundation's business operations.

The difficulty in creating matching arrangements is in part because CPOs are sparse in most of the challenging regions in which their presence and expertise are needed. Thus, individual philanthropists working in those regions could not be paired with credible community foundations. The new global electronic Community Foundation Atlas will provide an improved basis from which to identify and locate CPOs in particular areas. It will also help to identify areas in which they are needed.

## Phase Three: Project Findings, Recommendations, and Dissemination

The four-year duration of the project allowed for essential time for research and planning prior to engaging in the key regional meetings of the last few years. The planning phase's inclusion of a number of Synergos and non-Synergos initiated meetings and activities ensured that project personnel had sufficient time to review initial results and revise the sponsorship and organization of the key regional meetings. It also gave the organizers the space to reflect on the value of the timely publication of the *Ten Lessons of Multi-Stakeholder Partnerships*. Including these lessons in the regional meetings (except in Mexico) spurred both philanthropists and CPO leaders to reflect more fully on how they could work together. Essential discussions of opportunities and challenges concluded with concrete and culturally specific lessons and suggestions.

The following findings summarize the work of the project:

- Approximately 270 philanthropists and community foundation leaders were introduced to the advantages of working together as equal partners to achieve a more substantial and sustainable impact on resolving societal problems. Taking advantage of international gatherings and Synergos-convened meetings presented opportunities to target these two groups.
- First-ever surveys of global philanthropists and community philanthropy organizations completed in the research and planning phase revealed that the primary relationship between the two is financial. Most philanthropists were familiar with the concept of community philanthropy. However, they primarily used the CPOs as a pass-through funding organization to support a particular local project. Over half of the CPOs received financial support from philanthropists in support of a local project. The surveys provided an important empirical base of knowledge from which to further develop project activities.
- Expanded understanding of the potential of CPO/philanthropist collaboration. Experiencing the relationship as financial alone narrows both parties' knowledge and perception of who the other is, what their motivations are, and what they currently do and can accomplish in the future.
- Incorporating information about community philanthropy into the Learning Journeys of Synergos' Global Philanthropist Circle insured that philanthropists not only heard about the work of CPOs but also visited them. Seeing their programs on the ground and relating them to their own efforts provided first-hand knowledge of the advantages of potential relationships beyond solely financial support for their own projects. Where possible this will become an ongoing part of Synergos' Learning Journeys in the future.
- Discussion of opportunities, challenges and barriers at the New York focus group provided a thorough documentation of the points of view of philanthropists and CPOs. This frank sharing of information and concerns has not previously occurred between these parties on such a global scale.
- Increased knowledge of the value of CPOs as an extender of reach into local communities, a vehicle for partnership, and a site to engage and educate philanthropists can elevate their status in the eyes of philanthropists who have limited knowledge of CPO capability. Continued documentation and dissemination of their value are critical to reducing the barriers to cooperation between the two parties.
- Acknowledgement and use of CPOs as "centers for gathering or a beacon" for education and learning can go a long way to create equitable working relationships.

- Increased knowledge of the credibility of the community foundation movement and the potential for community philanthropy to play a more powerful role—especially in developing regions.
- Opportunities to build the field as well as the culture of philanthropy are enhanced by the results of this project. The field of philanthropy can be improved in specific geographic locations such as Africa through targeted, structured engagement of CPOs and philanthropists. The culture of philanthropy, including increased skills and knowledge around the power of giving, can also be heightened in areas such as Latin America.
- Large divides exist between philanthropists and CPOs. Each group shared common understanding and language not shared with the other party. The most prominent divides were ownership, vision, and agenda setting.
- Focus on the “softer” issues of educating, engaging, and building communication and trust are the primary avenues to bring the parties together.
- Convening regional meetings in Europe, Africa, South America and Mexico allowed for face-to-face conversations in specific cultural contexts. Exploring these contexts encouraged frank and constructive discussion of opportunities and challenges in each region.
- In Mexico, a next generation philanthropy group was established and introduced to the benefits of working with community foundations.
- Developing regions with histories of colonization by European or Western powers require longer processes to break down the barriers created by previous external interventions.
- Both parties in all regions recognize finding and developing the talents of “bridging leaders” as essential. People-to-people contact between donors and communities and between donors and CPOs can be increased by these leaders.
- Without the space and time to build relationship capital between parties, partnerships will be elusive. Trust and credibility are the primary components.
- Creating and measuring impact – essential for philanthropists – requires effective communication and collaboration with CPOs that work on the ground.
- “Expanding the space for CPOs” enhances the potential for social change. This is especially germane to working with marginalized communities in which the CPOs’ grassroots knowledge can greatly enhance the effectiveness of the philanthropists’ work.
- Lessons learned from working in multi-stakeholder partnerships are valuable tools for philanthropists and CPOs to study and share together. They provide a roadmap of how to work together and how to negotiate cultural sensitivities.

- One-on-one matches of individual philanthropists and CPOs require increased expansion of CPOs in regions in which they are sparsely located. Lack of information about their existence and their reach is also problematic.

Analysis of the above findings lead to a number of recommendations for building continued support to facilitate partnerships between philanthropists and community foundations:

- Establish projects simultaneously to stimulate a culture of philanthropy (including individual and family foundations) and to strengthen the links between community philanthropy organizations and individual philanthropists. In Asia, Africa, and Latin America, participants in the focus groups and regional gatherings felt strongly that the overall culture of philanthropy needs to be strengthened before or at the same time as establishing meaningful connections between CPOs and individual philanthropists. Of the countries involved in this project, South Africa and Mexico, both of which have a critical mass of CPOs and an emerging philanthropic culture, might best lend themselves to this opportunity.
- In Europe, continue directly to establish connections between individual philanthropists and CPOs. There is a relatively strong cadre of both, and sufficient strength and sophistication in both sectors that meaningful collaborations can be established without sacrificing their identities and goals. Many European philanthropists understand the importance of working with communities, and respect community organizations as bridgers to community culture. Similarly, many European community foundations are sufficiently established that they have both the infrastructure and the programs to collaborate with other philanthropists. We recommend continued work in countries with established philanthropic traditions and CPOs such as the United Kingdom to explore ways to work together.
- Establish Next Generation philanthropist groups in targeted localities that can learn early about the advantages of CPOs.
- Develop regional ambassadors of CPO leaders and philanthropists in developing regions who will promote the advantages of working together.
- Train bridging leaders. Identify potential candidates in developing regions who can facilitate projects between philanthropists and CPOs. Create a training program that begins with training of trainers.
- Philanthropists can consider playing a role in the development of new community foundations in marginalized areas that require seed money to get started
- Develop pilot projects in developing regions such as Mexico, Brazil, and Southern Africa with individual philanthropists and community foundations who are interested in similar

problems and agree to explore a partnership to address them. Create a process that focuses on structured engagement for each step of the project.

- Use the Community Foundation Atlas to identify community foundations and philanthropists in specific areas that can benefit from introductions to one another.
- We also recommend that the Global Fund for Community Foundations and others continue their work to expand the reach of community philanthropy organizations. Vehicles such as the Community Foundation Atlas will also help donors (and advisors to donors) in the future to locate community foundations in their geographic areas of interest.

## Conclusion

This project has opened a number of doors to creating opportunities for community foundations and philanthropists to extend their reach as well as significantly increase the impact of their work. It has substantially raised awareness and has also created safe spaces for constructive dialogue on how to move forward in working together. These spaces can now be transformed into more practical “laboratories” to address community problems. The opportunities available are summed up by the following remarks of one CPO leader:

*If you want to discuss letting go of an idea or a practice, it works best when you first develop a perspective and hold it firmly, and not just let it go into nothingness, but change your perspective because of engaging with others with different perspectives. Then you change to a different, firmly held and well-developed perspective. That is the process that you go through, rather than simply saying now I don't believe in anything. I don't hold any view. I am just open to everything.*



## Appendix A: Note on Definitions

For common understanding, the focus group and each regional meeting group used the following definitions:

A community philanthropy organization (CPO) (also known as a "community foundation"(CF)) is a geographically based grant-making organization which is supported by contributions from a variety of sources from within the geography it serves and deploys resources in accordance with priorities in that geography under the leadership of a governing body that is reflective of the community it serves. We recognize that there are many models of community philanthropy organizations around the core elements of local ownership and control; mobilizing of local resources (financial and non-financial); and grant making to meet local needs and opportunities. In addition to these core elements, many CFs/CPOs receive substantial funding from international contributors or others outside the geography they serve, seek to create a permanent asset base in the form of an endowment, allow donors to establish individual funds within the CPO for specific purposes, and operate direct charitable programs. (Note: "community foundation" and "community philanthropy organization" are used interchangeably)

Individual philanthropists are individuals or families who make monetary gifts or social investments directly from their own resources OR who give through a foundation or trust controlled by them or their families OR who give through corporate entities controlled by them or their families.

## Appendix B: Advisory Committee Members and Meeting/Event Participants

### Advisory Committee Members

<i>Name</i>	<i>Representing</i>	<i>Country</i>
Karen Ansara	Philanthropist	United States
Lawrence Lien	CPO/Family Foundation Trustee	Singapore
Clare Mathias	Philanthropist/CPO Board Member	United Kingdom
Lucia Dellagnelo	CPO	Brazil
Inviolatta Moyo	CPO	Zimbabwe

### May 2013 New York Focus Group Participants

<i>Name</i>	<i>Representing</i>	<i>Country</i>
Clare Brooks	CPO	Australia
Lucia Dellagnelo	CPO	Brazil
Paula Johnson	Facilitator	United States
Pierre Noel	CPO	United States/Haiti
Ricardo Betancourt	Philanthropist	Mexico
Adriana Cortes	CPO	Mexico
Claire Du	Philanthropist	China
Beulah Fredericks	CPO	South Africa
Ann Graham	Recorder	United States
Jerry Hirsch	Philanthropist	United States
Libor Maly	Philanthropist	Czech Republic
Clare Mathias	Philanthropist	United Kingdom
Inviolatta Moyo	CPO	Zimbabwe
Ellen Remmer	Philanthropist	United States
Shannon St. John	Synergos Institute	United States
Bing Wang	Philanthropist	China
Martin Yang	Philanthropist	China

### December 2013 Brazil Regional Meeting Participants

<i>Name</i>	<i>Representing</i>	<i>Country</i>
Sergio Amoroso	Philanthropist	Brazil
Maria Regina Cabral	CPO	Brazil

Leslie Carrasco	CPO	Mexico
Lucia Dellagnelo	CPO	Brazil
Daniel Domagala	Facilitator, Synergos Institute	Brazil
Peggy Dulany	Philanthropist	United States
Marcelo Furtado	Philanthropist Staff	Brazil
Anderson Giovani da Silva	CPO	Brazil
Graciela Hopstein	CPO	Brazil
Kevin Mathewson	Recorder	Brazil
Athayde Motta	CPO	Brazil
Juan Marcos Perez Gulin	CPO	Spain
Rebecca Raposo	Facilitator	Brazil
Jair Ribeiro da Silva Neto	Philanthropist	Brazil
Nancy Rodrigues	CPO	Portugal
Monica Cristina Vera Perez	CPO	Uruguay

### March 2014 South Africa Regional Meeting Participants

<i>Name</i>	<i>Representing</i>	<i>Country</i>
Peggy Dulany	Philanthropist	United States
Neville Gabriel	CPO	South Africa
Agneta Johansson	Philanthropist	United Kingdom/South Africa
Anders Johansson	Philanthropist	United Kingdom/South Africa
Len le Roux	Facilitator, Synergos Institute	Namibia
Nomboniso Maqubela	CPO	South Africa
Inviolatta Mpuli-Moyo	CPO	Zimbabwe
Patrick Parring	Philanthropist	South Africa
Shaun Samuels	CPO	South Africa
Shannon St. John	Facilitator, Synergos Institute	United States
Tanya Cruz Teller	Facilitator, Synergos Institute	South Africa
Fiona Cummings	Recorder	South Africa

### March 2014 Mexico Site Visit Participants

<i>Name</i>	<i>Representing</i>	<i>Country</i>
Maria Correa	Philanthropist	Mexico
Adriana Cortes	CPO	Mexico
Ana Paula Gavaldon	Philanthropist	Mexico
Nicole MacGregor	Philanthropist	Mexico
Monica Tapia	Synergos Institute	Mexico
Karen Yarza	Recorder and CPO expert	Mexico

## October 2014 Europe Regional Meeting Participants

Name	Representing	Country
Jiri Barta	CPO	Czech Republic
Kate Czarniak	Synergos Institute	United States
Peggy Dulany	Philanthropist	United States
Melissa Durda	Facilitator, Synergos Institute	Czech Republic
Corrine Evens	Philanthropist	France/Belgium
Louis FitzGerald	Philanthropist and CPO Trustee	Ireland
Ludwig Forrest	CPO	Belgium
Hilary Gilbert	CPO	United Kingdom/Egypt
Anna Ginn	Facilitator, Synergos Institute	United States
Ann Graham	Recorder	United States
Agneta Johansson	Philanthropist	United Kingdom/South Africa
Anders Johansson	Philanthropist	United Kingdom/South Africa
Daniel Kropf	Philanthropist	Belgium/France
Tina Roche	CPO	Ireland
Francis Salway	Philanthropist and CPO Trustee	United Kingdom
Sonal Shah	CPO	United Kingdom
Shannon St. John	Facilitator, Synergos Institute	United States
Henri van Eeghen	Philanthropist	Netherlands

## Appendix C: Sample of Materials Provided to Meeting Participants

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