

Philanthropy  
Networks:  
Creating Value,  
Voice and Collective  
Impact



**WINGS**  
WORLDWIDE INITIATIVES  
FOR GRANTMAKER SUPPORT

# WINGS: Worldwide Initiatives for Grantmaker Support

WINGS is a network of 150 philanthropy associations, networks, academic institutions, support organizations, and funders in 50 countries around the world whose purpose is to strengthen, promote and provide leadership on the development of philanthropy and social investment.

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# Summary

## One-minute version

Value. Voice. Collective Impact. Philanthropy networks, their leaders, members and funders alike, are looking to build a future in which these core elements are reflected in their work. How can networks define and realize new value propositions and amplify voice in a way that is responsive to members yet also shapes the field? What role can tech and data solutions play in enhancing value? What strategies in advocacy and thought leadership can elevate the voice and visibility of the sector? How can philanthropy support networks go beyond focusing solely on organizational impact to creating more collective impact across the sector? This guide combines thoughtful concepts, frameworks and practical approaches that all philanthropy networks can use to prepare their organizations for the next decade.

## Five-minute version

Philanthropy as a whole is facing a rapidly changing environment: problems are more ramified, more global and more urgent. There is a corresponding and growing recognition of the need for collective, rather than individual action to tackle them; approaches to the provision of social good are increasing and the boundaries between them blurring (some speak of a continuum along which philanthropy and social investment are ranged); technology has revolutionized the provision of information; and the role of philanthropy is being called into question as governments around the world seek to curtail the activities of civil society.

These challenges are making renewed demands on philanthropy support organizations (PSOs) to prove themselves in terms of value, voice and collective impact.

It's worth noting that in addition to challenges, some of the above developments can also be turned to advantage – technology, for instance, offers different and improved ways in which PSOs can fulfil their roles. Context is critical to the work of PSOs. This is one of the reasons why they show great variety in form and function. Another reason is the growth of philanthropy almost everywhere, with different types of PSOs springing up to meet the many different needs emerging among both institutional and individual philanthropists.

This variety notwithstanding, they have two things in common: promoting the practice of philanthropy and working for a more favourable environment for that practice. The question of value is often framed as a dilemma – should philanthropy support

organizations serve their members or the sector? In reality, this is a false dichotomy, since serving their member or clients ultimately benefits the sector.

There are a number of things to keep in mind in enhancing and conveying value: time, resources and consultation are needed for any process of change redefining value might require; PSOs should take advantage of technology to create new forms of value, but in pursuing them, they should not lose sight of the sense of community that is the essential glue of membership and network organizations; evaluation and communication are complementary to both enhancing and conveying value and both rely on good data.

There are two main ways in which PSOs either give or amplify voice to the sector, advocacy (promoting the demands and benefits of the sector to others) and thought leadership (stimulating the development of philanthropy internally). Advocating a more enabling environment for philanthropy to policy-makers is one of PSOs' most important roles. It's important that members or supporters recognize this and that it might involve criticism of, even confrontation with, governments, which can be uncomfortable for individual organizations, so agreement should be reached over how and when advocacy efforts should occur and how far they should go. Even when they aren't successful, advocacy efforts are not wasted. They can help PSOs and members refine and develop their own positions.

There are likely to be equally mixed views on the merits of thought leadership – some members will be more in favour of it than others. Some will worry that it is at the expense of what they see as core member benefits. It's important, again therefore, that its content is presented to members in a way that makes it clear it's worth investing time and resources.

Collective impact: the merits of collaboration in the face of increasingly complex problems are obvious. So are the challenges to achieving it – it is time- and resource-intensive. Fortunately, since the essence of PSOs is connection and community, they are predisposed to fostering and engaging in collaborations.

Some key steps PSOs can take to foster collaboration: They can commission or carry out landscape (the state of the field) and mapping (the actors in the field) studies which are both important to see where and how PSOs and their constituent organizations can profitably collaborate. They can take a more deliberate stance in fomenting and encouraging connections among like-minded members. They can provide a platform on which a smaller interest group can form and base itself.

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# Foreword

## Who said net-working means not-working?

Few forms of organization and action require as much thoughtful, work intensive, persevering, adaptive, and well-resourced effort and labour than networks to be successful. While their reward lies in sustainability, impact, trust and effectiveness, their establishment and management are complex. In philanthropy, it does not always seem natural for its players, whether they are foundations, HNWLs, families, individual donors, communities or corporations, to see themselves as part of a sector. Networks and other support organizations are a reflection of this sector's self-consciousness... and their accelerator.

Philanthropy networks exist in many forms and fulfil a broad array of form and function: geographic, thematic, focused on specific types of private donors, member-based, informal, providing technical advice, advocacy, practical knowledge, etc. Their common point is that they allow for close communication, collective action and thinking. At WINGS, as a global network of philanthropy networks, reflecting on their nature and impact is part of our DNA. We were created 20 years ago by a group of grantmakers' associations from all over the world who felt they needed a space to share knowledge and collaborate at the global level.

The two first grantmakers' associations were started shortly after World War II, one in Germany in 1948 and the other one in the US in 1949. Maybe this tells us something about how building networked organizations, creating links between those who seek to build more peaceful and just societies is a key first step in establishing the societies we want.

Of course, networks are not ends in themselves and there would be nothing to celebrate about them if it weren't for what they allow philanthropic actors to achieve. The same applies to philanthropy itself whose value should only be looked at against the positive changes it supports in society. It is with this in mind that we decided to produce this publication, half practical guide, half deeper reflection.

## Why this publication and why now?

Through our observation and research of the field, we know the strategic value and impact of these players. Yet few resources are available to help them maximize their impact. We are also aware of some of the stiff challenges they are facing. The first one is why should we exist and for whom? Are we representing the whole diversity of the sector? How can we remain relevant in a fast-changing environment? How can we effectively protect our constituency and sector in a hostile political context? Do we stand for clear values? Are we focused on achieving the maximum positive impact in society through our mission or are we seeking to thrive as individual organizations?

The current landscape urges us to find clear answers. Everywhere, we see a rising wave of criticism of, and skepticism towards, the philanthropic sector both from the left and right of the political spectrum. On the one hand, there is a narrative about a sector which potentially plays against national interests, and on the other, a demand for more accountability and transparency from the field, especially where "big philanthropy" is concerned.

Although every single foundation and donor has a responsibility to respond to these challenges and, when needed, to evolve in its own practices, no individual organization can provide an answer and preserve the sector's ability to contribute to common good. It is networks that have the agency and legitimacy to do so.

Taking another lens, let us look at impact. Increasingly, we see that long-term impact, impact at scale can only be achieved through complex, adaptable and collaborative processes. By providing the space, tools and connections for peer-exchange and, sometimes, for collective action, networks contribute to breaking the silos and building the architecture for collaboration within the field, and possibly with other actors. More basically, they help increase the efficiency of the sector through enhanced information and coordination, practical tools and support services.

Despite their strategic importance and the particular momentum that surrounds them, most countries do not have national associations or other collective organizations for the sector. WINGS' *Infrastructure in Focus: A New Global Picture of Organizations Serving Philanthropy*, found that 80 per cent of the expenditure on philanthropy support organizations is in North America. Although the sector is growing, there seems to be an important potential to create new networks and strengthen those that are already in place, including through increased domestic funding.

In countries like Peru, Haiti, Chile, or in regions like West Africa, domestic foundations have reached out to WINGS over the past few years asking for support and guidance on how to establish and sustain associations and networks.

In parallel to that, the infrastructure space is changing, with new actors coming into the field, creating what is sometimes a congested space with competing networks. Even where the field is older, we observe a lack of sustainability of organizations and some unnecessary competition. The next generation of donors is bringing new, sometimes less institutionalized, approaches to philanthropy. Adding to the challenging political context mentioned earlier, networks and associations need to confront the rapid pace of change and sometimes to reinvent themselves.

In this era of great opportunities and important threats, we felt that we needed to engage with the network in a collective reflection on philanthropy networks. This publication is not aiming to provide predetermined formulas and ready answers. We hope it will ask some relevant questions and that, by tapping into the WINGS' network wisdom, we will engage in a joint and open reflection that will contribute to making our organizations better equipped to continue making a difference in a disruptive environment.

To conclude, maybe should we challenge the assumption we made earlier. What if networks were not only a means to achieving the philanthropy we want but were a constituent part of it? Could a more networked, trust-based, collaborative philanthropic sector be part of the solution? And in the same way, what if philanthropy was not only a means? What if we could work towards the establishment of philanthropic societies, in which giving at all levels of society, reciprocity, solidarity, trust, self-reliance and agency, are at the centre? Through their value, voice and impact, philanthropy networks may help us along the way.

**Benjamin Bellegy**  
WINGS Executive Director

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# Introduction

Looking at things from a distance helps expand the field of vision. From a location of more than 3,000 feet above sea level, a group of philanthropy support practitioners were asked to visualize the key success factors of networks for the future. Their responses fell into three main areas:

- Generating more value for network members and the field
- Amplifying the voice of the philanthropy sector
- Creating more opportunities for collective impact

This visualization took place in April 2019 at a convening organized by WINGS and hosted by the Caribbean Philanthropic Network, bringing together a group of 70 leaders of philanthropy networks and associations from across the world, to discuss the future of networks. This guide was prepared for practitioners, funders and partners of philanthropy networks and associations by blending insights and reflections shared at the Jamaica convening and building on this to offer practical considerations and approaches to building networks for the future.

There were several key steering principles in preparing this guide. The most important one is that, in the work of philanthropy support organizations, context is crucial.

There are many reasons for this: the topics and areas donors are funding – climate change, radicalism, attacks on rights and freedoms, economic inequality, etc - the political, social and economic conditions within which they are working and especially the views and regulations of philanthropy and civil society, the founders and funders of the network are some of the main drivers of this.

As networks are representative of the individual and/or institutional donors which comprise their membership, these contextual factors affect their own strategies and operational models. While we can refer to a common set of functions of philanthropy networks and associations, the way in which they are structured and their approaches to implementation are highly varied. Network leaders across the world naturally express a great diversity of views on how they should best support donors and the philanthropy sector. Should they be more proactive or more supportive? Is there room for more self-criticism (of the philanthropy sector) or should they do more to protect the sector and promote a more positive view? Would it be more valuable for networks to go beyond professionalization of the sector

and focus more on the issues threatening it? Are they too focused on gaining new members and serving them, becoming too club-like and insular? Conversely, do they place too much stress on building and leading the field at the expense of serving their members?

There is one answer to these and other such questions - it depends! Specific approaches depend not only on the factors discussed above but also governance, maturity of the sector in a given country or region and the human resources and financial capacity to build organizations that can effectively serve their functions.

The sheer diversity and uniqueness of this particularly niche sector means that it resists 'blueprinting'. While there are of course similarities in overall purpose, vision and mission, and the way in which such networks and associations operate, there is no one right way. This also makes preparing a guide such as this a challenging task.

## Principles for this guide:

- Offer useful information for new and/or existing practitioners in the field, no matter where they are in the organization's lifespan.
- Recognize that context is critical, and that there is no one right way or direction; yet also propose some reflections for common spaces and constructs that help the sector have a shared understanding about roles and functions.
- Have a global scope and perspective.
- Avoid prescriptive solutions; respect unique practices and approaches.
- Spark more questions rather than offer or suggest answers on current topics facing networks.
- Incorporate useful resources and weave in practical information blended with contextual and experiential reflections.
- Apply knowledge from a vast number of philanthropy 'sub-fields', such as
  - Non-profit membership associations
  - Community foundations and organizations
  - Non-profit management
  - Philanthropy support organizations



## Three trends leading philanthropy networks to create more value, amplify voice and generate collective impact

Particularly over the last decade, the urgency of current issues - climate and migration among them - has led to more philanthropic and social investment and a diversity of new actors and approaches (venture philanthropy, social investment, impact investment, social impact bonds and the like). We are also witnessing the blurring and blending of these approaches and a host of innovations on how to best tackle the myriad crises and support of NGOs and social enterprises in doing so.

There is greater awareness of the strategic vision, time and resources required to generate impact, and the partnerships needed to do so, which has also raised the perceived value of collaboration. Funders are looking to networks and platforms for shared learning and collective action, and not just for information and networking. These latter functions, once considered to be one of the main benefits of philanthropy support organizations, are rapidly being replaced by technological platforms offering digitization (sharing of information) and digitalization (using technology to redefine core offerings such as online/webinar trainings) opportunities. Given greater access to information and practice with a simple click on a screen, funders also seek more bespoke services. Given these trends, philanthropy networks are becoming acutely aware of the need to refine and clarify their unique value propositions. Under this theme, the guide takes a closer look at topics such as member services, engagement, and knowledge and practice development, as well as how to assess and communicate value. Data and technology is also a critical issue addressed in this section.

With all of this activity, expansion and innovation in philanthropy, there is also a countervailing trend in the form of restrictive legal frameworks for philanthropy and civil society. According to the International Center on Not for Profit Law, since 2012, in 72 countries worldwide (and particularly in Sub-Saharan Africa) there have been resolutions which have threatened the ability of civil society to exercise core civic freedoms – association, expression and peaceful assembly – not to mention issues around data security. While establishing a direct correlation is not possible, it is also interesting to note that, according to WINGS, the highest number of philanthropy networks established in the past decade has also been in Sub-Saharan Africa. According to Freedom House, between

2006 and 2019, associational and organizational rights have eroded significantly in forty-three countries, while improving in only sixteen.<sup>01</sup> A November 2018 CIVICUS report found that 'civil society is under serious attack in 111 countries, almost six in 10 countries worldwide,' with restrictions often taking the form of new NGO legislation, counter-terrorism measures, and administrative rules.<sup>02</sup> A recent Carnegie Endowment report notes that, 'in a few cases, domestic and international advocacy has managed to ward off or limit repressive measures, yet, the wider trend of governments using legal and extralegal means to limit or close civic space so far shows no signs of abating<sup>03</sup>.' These restrictions affect the work of funders, both directly and indirectly.

### Common purposes of philanthropy networks and associations:

**Fostering a sense of belonging** among people with common professional interests (especially important in countries where the number of professionals working in the sector is very limited).

**Creating safe spaces for new connections** which allow people to establish trust among others in their community of practice.

**Facilitating the exchange of information, ideas and practice** through, face-to-face and virtual convenings (again, especially important in countries where 'learning by doing' is so critical and there are limited sources of information on good practice).

**Promoting thought leadership** on topics that help to further the field in terms of practice and approach.

**Generating opportunities for collaboration**, by developing relationships with people and organizations they may work/partner with in the future - within that sector and with other sectors.<sup>04</sup>

**Increasing the visibility, credibility and legitimacy** of the sector through consistent communications and initiatives that display the value of the sector to the wider public.

**Engaging in policy advocacy**, to encourage a more enabling environment in legislation and regulation concerning funders.

In the face of this trend, leaders and members of networks alike are calling for more voice – for philanthropy to be recognized more publicly for its contribution and to be heard by the media and policy-makers. Notable books in the US such as *Decolonizing Wealth* and *Winners Take All* are fueling critical debates both within the sector and outside of it and are challenging conventional wisdom and practice of philanthropy. These developments require philanthropic networks to be even more active in their core function of promoting an enabling environment (laws and regulations) for the sector. The pressure to act is higher as they seek to 1) acquire greater technical skills in policy analysis and advocacy strategies (which WINGS and ICNL are helping with), 2) increase communications (for example, with recent campaigns such as #LiftUpPhilanthropy and #Philanthropyworks), and 3) promote more substantive dialogue within and among philanthropy networks to increase transparency and accountability and improve communication with the public about their investments, approaches and impact. Under the theme of amplifying voice, the guide dives deeper into two main activities that networks are engaging in to further develop the sector: Advocacy and Thought Leadership.

Finally, the rise in different forms of philanthropy support organization has led to a greater awareness of the broader ecosystem of actors (see the WINGS Global Landscape Report of 2017 for examples). Such organizations, many of them networks, are based either on a certain geography, an approach to giving (e.g. venture philanthropy, impact investing, community philanthropy) and/or a certain field (human rights, gender, climate, etc.).

A result of this is that support organizations are becoming cognizant that information about who is doing what, where, how and with whom is crucial for a sense of the ecosystem within which they are working. Landscaping and mapping studies are necessary to ensuring more effective use of

Philanthropy is very emotionally connected to individuals. In Asia and other emerging markets, a lot of foundations are blurred between individual and corporate philanthropy, between philanthropy and social investment. In many cases its new first-generation wealth, people are creating institutions led by the wealth holder's vision'. AVNP became all things to all people; we've been flexible about definitions and what the market has asked us to do.

— Naina Batra, Asia Venture Philanthropy Network

At the Narada Foundation we have learned that the impact of supporting sectoral infrastructure takes time to make itself felt. Funders have to be patient which means they need to be prepared to provide multiple-year grants, accept the fact that there won't be much immediate return, be comfortable to be not in the spotlight, and also tolerate failures. And while funding is important, it is far from enough to build an effective infrastructure organization. We need to link them to other networks, introduce them to other funders, build up their capacity and contribute to their board governance.

— Yanni Peng, Narada Foundation

resources – which are already limited for philanthropy infrastructure - and to create synergies with other actors.

In the past few years, there has been an observable (though not easily quantifiable) increase in donors investing in the development of philanthropy infrastructure by creating and underwriting new philanthropy networks and platforms and/or investing in specific activities such as research, advocacy, sharing experiences and the formation of collaborative funding platforms. While this is an indicator of progress, it brings new challenges. One is that many are new to the field and understanding the philanthropy support sector and its geographic, organizational and contextual factors takes time and investment. The second is that donors need to consider how their support of one organization or activity may affect the whole of the philanthropy support ecosystem and to be careful to avoid risks of duplication, the 'silo-ing' of projects, and the creation of competition rather than collaboration.

Taken together, both support organizations and their funders are starting to realize the need for a collective impact mindset that working in alignment, perhaps even in partnership, is likely to produce more impact than that of any one organization working on its own. Evidence of this shift in mindset is apparent from the new studies and initiatives taking place both among philanthropy support organizations and their funders. Landscape and mapping activities in India, Brazil and other countries and the recently published research study on European Philanthropy and Social Investment Infrastructure are some examples. This guide shares insights and practices on three topics related to generating more collective impact - knowing the field and actors in the ecosystem, nurturing connections within networks (among members) and elaborating strategies for collaboration within ecosystems and among other actors.



## A framework for value, voice and collective impact

This simple framework was developed to support the conceptual structure of the guide which focuses on three main topics: Value, Voice and Collective Impact.

There are four dimensions through which networks often create value and amplify voice. These activities can be characterized in two ways (not mutually exclusive): responding to needs and shaping the field.

The upper two dimensions tend to have a member focus, with the goal of strengthening individual and organizational capability thereby adding value by doing two things: providing services and helping members engage with one another, and developing content and activities that share knowledge and guide good practice.

The lower two dimensions have a sector focus and help to amplify voice, which is another critical role of networks in building and strengthening the field of philanthropy. This usually involves engaging in advocacy (and all activities related to policy and regulations) to promote and protect the sector and promoting thought leadership, to help shape conceptual and practical approaches to the field of philanthropy.

While this framework presents the general areas through which philanthropy networks and associations create value and voice, most certainly there is a spectrum of other activities that can fall under one of these areas or can span a combination of areas. It is quite likely also that organizations will have varying degrees of focus, investment and expertise in different areas.



Collective impact is a mindset that can allow for increasing the value and voice of philanthropy networks in each of these dimensions. They can use this framework to understand that opportunities for collective impact occur in a number of ways.

Networks can look at their own organizational assets, consider where they have strengths to offer (or weaknesses to overcome) and where they might benefit from linking up with others in the ecosystem to increase efficiency and overall impact in a certain area.

Members of networks can use this to determine in which area they wish to join forces and/or deepen their engagement with the network as a platform.

Section one

# Creating and Conveying Value



# Creating and Conveying Value

## Summary

Philanthropy networks often undertake two main activities to create value for their members: membership services/engagement, which is a more responsive approach, and knowledge and practice development, a more proactive, field-shaping approach. Engaging in member-focus activities contributes directly to how members view the value created by the network/association. It contributes to increasing value on a technical level (topics concerning funder/foundation operations), and as a community builder, creating a safe space for connections and sharing. Member-focus activities also communicate the value of links between inputs, activities, outcome and overall impact. They can also be challenging in that they often have costs - especially if the service is bespoke - which can be difficult to cover with basic membership dues income and may require more sophisticated fee-for-service approaches. How to serve members without charging more is a very common challenge. This page provides a summary of topics and tips for defining and enhancing value in philanthropy networks.

### Value as a journey, not the destination

Designing an inclusive journey is critical to ensuring the different stakeholders in the organization (and in the ecosystem!) have a voice in the process of determining what is considered valuable and developing strategies to achieve them. It's important to build in time and resources for process and relationships during strategic planning; avoid the temptation to rush toward achieving results.

(Note: Landscaping and mapping are useful tools for determining value, especially for new organizations and those working in sectors of rapid growth and change. See section three, part one for more on this).

### Creating value

Undertaking assessments of how member services, engagement, knowledge and practice are being affected by technology in your country/region can be useful for determining what new solutions and service offerings members and sector can benefit from.

Other forms of value creation include balancing technology-driven solutions with a sustained focus on promoting belonging and a sense of community among members; creating opportunities for small groups to form but ensure the connections among them remain close and aligned. Recognize your role as an information aggregator to find new ways of crowdsourcing knowledge and practices among members.

Data is a critical value-creation tool - finding ways to help further the work of funders (members) to increase their own impact as well as develop the sector can be very useful, especially at a time when its transparency and accountability is under a glaring spotlight.

### Conveying value

A compelling, unique value proposition sets an organization apart from others. It helps explain how support will make a difference, bring a benefit, or create an opportunity not found elsewhere in four key ways: who you are (values, purpose), whom you serve, how you serve them, and what you offer.

Evaluation and communication are synergistic. They feed off each other to create a combined effect greater than the sum of their separate activities. When they are in alignment, organizations are in a much more powerful position to convey their value to the communities they serve and work in.

Keep in mind the three levels of analysis when evaluating and communicating: member focus, network focus, sector focus. This can help clarify purpose, approach and methods when undertaking assessments and preparing communication materials.

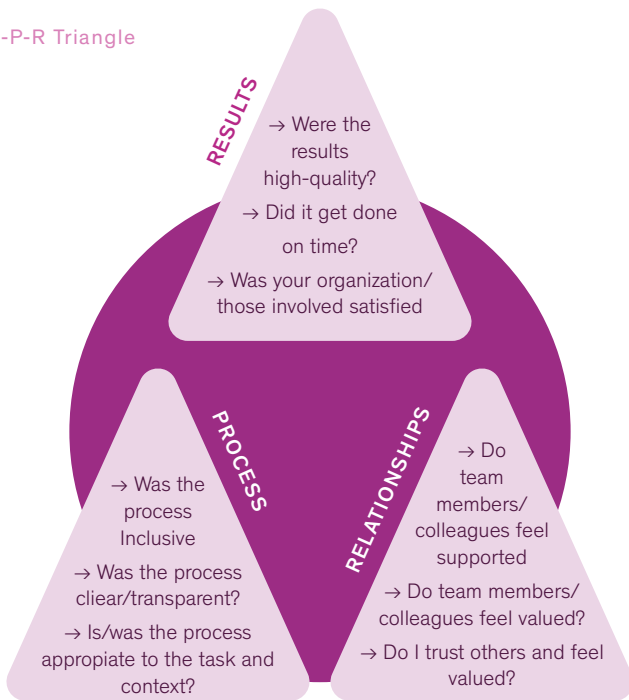
## Value as a journey, not the destination

Many reading this guide may be wondering where to start when it comes to determining how and where to create value for members and networks. While there are hundreds of resources on strategic planning models for non-profits, keeping it simple can be the best approach.

There are usually three main questions that guide development of a future strategy and approach, according to the Interaction Institute for Social Change: where are we? Where do we want to be? And how will we get there?<sup>05</sup>.

Another common challenge is the pressure to get to the result without giving consideration to the value of process and relationships. These two dimensions can be considered as a means to an end, whereas, in fact, they are equally critical inputs to achieving the end result.

### R-P-R Triangle



Adapted from the Interaction Institute for Social Change

The process (the way or spirit in which planning is carried out) and thinking about relationships (quality of the connections between the people engaged in the planning) are the basis for obtaining results, what the Interaction Institute for Social Change calls the R-P-R triangle<sup>06</sup>. Without the two bases solidly in place, networks risk losing exactly what they seek from engagement with their members.

### The Pathway to Action Model



### KEY STAKEHOLDERS

Where are we now?

How do we get from here to there?

Where do we want to be?

Adapted from the Interaction Institute for Social Change

## Actively engaging stakeholders

The first step, therefore, when embarking on a strategic questioning and planning journey is to create a 'plan for planning' and make sure it is well defined and communicated, structured and that it helps the organization arrive at its desired destination. This is likely to take time, and stakeholders should be informed upfront about this; but the time invested in the journey means that a more satisfactory destination will be reached.

Regardless of whether an organization is in the idea or start-up phase, or undergoing a renewal, similar approaches are needed to guide the process of strategic questioning and planning in philanthropy networks, though the process for inclusion and consultation itself varies greatly and can include one or more of the following:

- Engaging members and stakeholders in the design and preparation of the strategic plan process. This can be done by setting up a committee which involves members, board members, staff, funders and other stakeholders as needed.
- Consultation methods can include one or more of the following:
  - **Interviews:** with key existing or potential members, funders, partners.
  - **Surveys:** useful for gathering mass member data, as with the WINGS *New Global Picture of Organizations Serving Philanthropy*, in which members were surveyed on their core activities, challenges and needs.

- **Focus groups:** face-to-face or online groups that are facilitated (ideally with the support of external consultants) to gather inputs on needs and expectations of members. These could also include groups comprised of other stakeholders.
- **Discussion with peers and funders:** this could also take the form of surveys or roundtable discussions, but as they are critical stakeholders, it is important to have insights from these groups as well.

Surveys are often the most popular consultation method; they can reach more people in less time and their quantifiable nature makes analysis easier. However, many a survey goes unanswered! Below are some tips for putting together surveys that more people will respond to and that will bring the data you seek<sup>07</sup>:

- 1) If possible, work with an independent (non-staff, board, member, etc.) actor to prepare survey questions and analyse data, to avoid organizational bias (when factors such as culture, senior leadership, strategic focus and team organization influence data selection and data).
- 2) Avoid the temptation to formulate survey questions without clarity on how answers (data) will be analysed and used.
- 3) Explain why you are asking a particular question and do not ask multiple questions in one question – this will help you obtain clearer answers.
- 4) Create a mix of multiple choice and short, 'essay-type' answers for questions.
- 5) Send an introductory letter explaining the survey, its value to the organization and how the data collected will be used.
- 6) Keep questions to a maximum of 10 and say how long it should take to fill out.
- 7) Thank recipients in advance for filling out the survey and after for having done so.
- 8) Ask survey recipients if there is anything else they want to tell you.
- 9) Tell people who take the survey that they will receive a report on the data gained from the survey.

Having recently undertaken a strategic questioning and planning process during the renewal phase of the Council on Foundations in the USA, Natalie Ross, the Council's Vice President for External Relations shared some reflections and pro tips:

- Create task forces that engage members actively and give them ownership of the renewal process. Be sure to include both new and existing members. Survey members on a regular basis to avoid surprises and keep a regular pulse on needs.
- Philanthropy associations depend heavily on the ethos of community. Be careful not to sacrifice engagement for efficiency when cost-cutting and restructuring. Many members highly value the 'bonding' aspect as well as the 'bridging' aspect (borrowed from Putnam's social capital theory) that umbrella organizations such as the Council offer.
- Act slowly and be careful when it comes to raising member dues; the perception of value vs cost is critical and drastic hikes in percentage terms will cool members' enthusiasm, even if the actual cost of the increase is not dramatic.
- Have a clear strategy on volume vs diversity of members. This depends on the member market and financial conditions of associations, especially if dues are scaled and determined based on asset size of organizations. Is it about having more diversity (necessary for representation of a sector) or volume (more emphasis on higher-paying members)? Be clear and realistic about goals and implications.
- Revisit the value proposition of the organization in the changing context. In the US case, since the Council formed, hundreds of other organizations similar in purpose (albeit not scope) have arisen. Be ready to step back from some areas and step into others and always be open to collaboration.

Natalie also suggests considering costs of renewal work, and engaging funders and members to contribute resources for consultants and other activities. She also suggests pilot-testing new strategies, programs or policies before fully rolling them out, especially when it comes to membership. She highly recommends the book *The Race for Relevance*<sup>08</sup> by Byers and Coerver.

## Creating value

Serving members is among the core purposes of a philanthropy network organization, who often question their value. The challenge is how to add or create more value in a way that also promotes financial sustainability and takes advantage of the myriad technological tools that increase accessibility.

Some feel it is important to establish and continuously strengthen the brand of the organization. This can be done in many ways, and services offered to members, network engagement activities such as convenings/ events, knowledge (guides, publications) and practice (training, on/offline) are among the most commonly valued offerings of network organizations. They can be designed and offered in response to specific needs, or in a way that helps to shape the overall sector. While these continue to be valuable activities, the way in which they are realized can be reconsidered. Here are some of the ways in which philanthropy networks are innovating when it comes to value-adding services and activities for members.

### Designing responsive member services: Technology to engage

According to Rosa Gallego, Director of International Relations at the Association of Spanish Foundations (AEF), helping members with day-to-day operations, providing legal and technical support has been a core service offering of the Association. Today, however, access to this type of information is a lot easier, largely due to the internet. As the Association overhauls its programs and services, she, like many network leaders, is looking for new ways to be valuable to members. 'They don't necessarily need us to connect them anymore - but they need us to get connected!' she says.

#### Threats to philanthropy networks:

- Speed of change
- New initiatives which require us to be nimble and dynamic to attract others
- Lighter-touch approaches
- Competition for members

— Rosa Gallego, Association for Spanish Foundations

Technological tools now make it possible for many services once offered by networks to be delivered faster and at scale. They also enable networks to crowdsource the collective intelligence and know-how of members and serve as a platform, a marketplace of sorts, to display and share that valuable information. This way, members can share knowledge and practice tools with other peers. This can be especially useful for networks of networks. As one network leader put it, 'we have to be the platform of apps, not the app itself!'

### Example

Maryland Philanthropy Network uses a high-powered Salesforce integration tool and offers other network members the use of it, which allows them to perform tasks from event registrations to streamlining data management.

Networks are meant to be multipliers of impact. They are information aggregators, but only if they have the right tools to enable them to collect and share information in a way that adds value to the entire membership.

Technology investments can be costly, yet, as hubs, the cost and benefit can be shared with members. Not all foundations, funders, associations and networks have the capability or the volume of workflow that warrants investments in expensive and complicated data and process management systems. But it might be in their interest to use shared platforms which philanthropy associations are well placed to offer. They can invest in their own technological infrastructure to increase efficiency and pass on this benefit to members by sharing the use of these platforms for a fraction of the cost of implementing their own data management systems.

Other networks are considering more customized services to members such as research, program design and evaluation support. In some cases, they are acting as 'fiscal sponsors' (hosting the initiative of a donor in the organization, providing administrative support to donors who thus do not need to create their own organization). Hosting funder collaboratives is another popular route, and both of these are gaining more traction.



There are challenges to offering such services, however. There may be some legal or fiscal considerations (not all regulations may allow for these kinds of services). Another is the cost of delivery, since hiring qualified consultants to provide services requires a proper business plan and fee model. Another challenge is payment. Often, members of networks do not have the budget (and in some cases, the will) to pay extra for bespoke services.

### Example

The Narada Foundation in China found an interesting way to address lack of payment for services. They provide matching funds to encourage organizations to use services of infrastructure organizations; this also provides an important feedback loop for the provider which can adjust its delivery accordingly.

However, these should not deter organizations seeking to explore these options, as there are consulting firms and other for-profit practices emerging that are offering similar services, which members of networks may be willing to pay for. Also, by engaging in these activities, the network not only creates more value for members but also increases the value (via knowledge, experience, exposure) of its own organization. Undertaking a needs analysis to determine what market there may be for these services may be helpful in forming new plans in this direction.

Network models of the future need to be more about the members, not the node—when we aggregate, we learn more. Sharing technology avoids unnecessary duplication and cost—there are great opportunities here for associations and networks.

— Chris Worman, TechSoup

### Pro tips for convening events:

- **Space:** Do not choose a space for an event where you would not want to spend more than an hour with a group of friends. In a world where everything is virtually available, physical space matters more!
- **Content:** When designing, reflect the needs of members and align with the strategic objectives of the organization: does the substance address a core issue your members and sector are tackling? Does it explore something that is less known-about but on the horizon?
- **Design:** Leave a lot of time for networking. This is the main reason people attend events. With so much content available in print and online, in-person convenings must offer more interaction among participants; panels with 'talking heads' are seldom good and only useful when the information being conveyed is brand new to most listeners in which case it is an informative approach rather than a discussion.
- **Delivery:** We may not be happy about it, but the world of communication has us vying for bite-sized and tweetable sentences. Catchy, attention-grabbing but most importantly, to the point. Delivery matters and audiences will tune out immediately if they don't feel connected to delivery.
- **Balance:** Ensure all forms of diversity are represented when selecting speakers.
- **Pricing:** If there is a cost, it should take into account the market value (look to other benchmarks). The costs should cover the event and, if possible, leave some margin that contributes to the general operating expenses.
- **Virtual engagement:** Where possible, do live-streams of face-to-face events so others can join. Record and share these on YouTube and other platforms to increase visibility and access to content.
- **Capture learnings:** Prepare a short report of the convening to capture learnings and share with those unable to attend.
- **Spread the word:** Using social media and preparing hashtags to encourage participant engagement can help create a 'footprint' for the event.

## Section one: Creating and Conveying Value

Convenings are often viewed by members as a very valuable offering. People love coming together because it produces a sense of belonging that online meetings cannot fully reproduce. Webinars, live streams and other virtual connection opportunities increase accessibility but do not satisfy the need to connect with one another, person to person.

However, there is some pressure to make these events more engaging and valuable considering the effort and money spent to be there. Everyone will have sat in sessions where participants spent more time on their phones than listening to the proceedings. See the pro tips box on things to keep in mind.

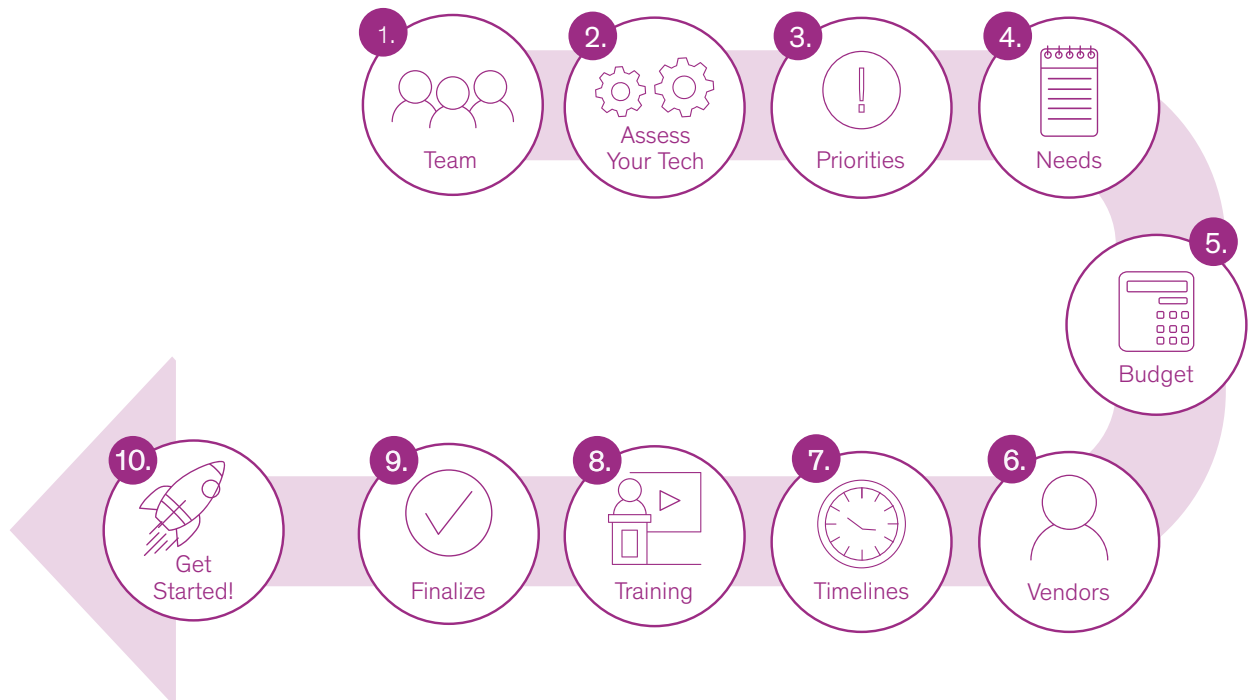
### Shaping the field through knowledge and practice

This dimension has a more proactive member-serving focus as opposed to a needs-based approach to services. Sharing knowledge to further the practice of funders

in grantmaking, other social investment tools, assessing impact, or any other core area of funder activity is invaluable. Next to convenings, this is usually the most common offering and the one most highly valued by members.

Here again, technology is a game changer. In fact, perhaps nothing has changed as drastically as a result of technology than learning solutions and approaches. With the onset of e-learning, top-notch courses and content can be accessed from one's living room. Learning experts also suggest that online learning can be more effective (for technical know-how transfer) than classrooms. New investments and offerings using platforms that connect people virtually; webinars, group chat platforms, e-learning platforms such as Philanthropy University<sup>09</sup> are among some innovations to consider.

## CREATING A NONPROFIT TECH PLAN



Adapted from DNL MNIMEDIA

## Examples

According to WINGS' *Global Landscape of Philanthropy* report, philanthropy networks and associations across the global prioritize convenings and peer learnings. Here are some examples:

- The Donors and Foundations Network in Europe (DAFNE), the European umbrella organization of philanthropy associations, is particularly keen on peer learning opportunities. They have multiple formats, including retreats, forums and exchanges.
- United Philanthropy Forum (UPF) also has a strong focus on peer learning.
- The European Venture Philanthropy Association (EVPA) Training Academy, links their Knowledge Services directly to training. They use the research they do on practice and outcomes to inform training programs, some of which are also available online in webinar format.
- Peer learning and affinity groups are part of the DNA of the European Foundation Centre (EFC) and offers a dedicated place to exchange knowledge.

Depending on the size and scale of the network, creating a customized e-learning platform where members can co-create, crowdsource and share the use (and the cost!) is also a possibility. This will, however, require significant investment in both hardware and software as well as technical staff for maintenance and management<sup>10</sup>.

Face-to-face learning experiences, though, are by no means obsolete. While many more are counting their carbon footprints these days, few experiences are as rewarding as acquiring new technical or analytical skills and knowledge, especially with and from peers in a community you feel commitment to.

It should not be a matter of either-or...  
do what you need to do for the field,  
and link it to member benefit.

— Max von Abendorth, DAFNE

Belonging is a reciprocal responsibility of the individual and the groups we try to belong to accept us as we are, without having to trade away what is important to us.

— Andrew Chunilall, Community Foundations of Canada

## Pro tips for training design:

If organizations choose to design learning experiences, Beth Kanter, a well-established international thought leader with deep expertise in this area, suggests a basic framework:

### Before (Analysis, design and development)

- **Analysis:** identify learning goals, audience needs, existing knowledge and other background by audience research. Consider the learning environment, constraints, delivery options and timeline.
- **Design:** create a description of goals, content, instructional activities, materials, technology, documentation and evaluation - also known as a lesson plan. Include the participants, especially if a peer learning experience.
- **Development:** undertake research, prepare learning materials by localizing content and incorporating examples. Where possible, include opportunities to share and see live case examples.

**During:** Focus on delivery of instruction and content including presentation and facilitation skills. The best peer learning spaces are facilitated by experts in facilitation, not subject matter experts. Methods should extract experiential knowledge and practice and allow space for reflection.

**After:** Obtain audience feedback through a survey or focus group, evaluate training (implementation) against learning goals (lesson plan) and learn how to improve delivery and instructional exercises.

Training remains a popular offering, especially in sectors where skills are lacking. Combining on- and offline content is also an effective way of reinforcing learning. Online is useful for transfer of knowledge, while offline learning spaces support reflection and practice. Peer-learning activities are also very valuable, strengthening bonds among people and enhancing learning outcomes. Given that practices in philanthropy draw extensively from experiential and emergent learning, creating spaces for peer learning is increasingly essential. According to the Nonprofit Association of Oregon, peer-learning cohorts are excellent opportunities to find synergy with professional development trainings:

*'As they listen to each other's experiences, leaders learn that many of the challenges they face are not unique to their organization. By working together on areas of shared interest, nonprofits can often arrive at solutions that they could not accomplish on their own.'*

Teaching can be perceived as a very top-down approach; sharing experiences between and among members has been a core offering of EFC which has groups for professionals working in communications, finance and other core areas.

— Gerry Salole, European Foundation Centre

### Driving data solutions for members and the sector

According to the headline of an Economist article, 'The world's most valuable resource is no longer oil, but data'<sup>11</sup>. According to leading data thought leaders<sup>12</sup> Cukier and Viktor Mayer-Schönberger, data allows us to extract new insights and create new forms of value, providing the ability to make predictions and infer probabilities. It can help us find proxies in social contexts for predictive analysis. They propose that the cost of collecting and analyzing data can be lower than the cost of a problem if precaution is not taken, that is that if we collect data that can help us predict future problems, then costs may be lowered in solving them.

The ways in which the philanthropy sector can capture and use data for public good are numerous and growing each day. In networks, data underpins member services, engagement, knowledge and practice. Among other things, it can support member organizations to:

1. Make better funding decisions (what interventions are best suited to address problems);
2. Assess the impact of funding;
3. Manage internal operations efficiently;
4. Map a field and the actors within it;
5. Create and manage connections with networks.

Looking back to the value/voice framework, there are two dimensions to consider with regard to data: the first is what philanthropy networks can do with and for members; the second is what networks can do for the sector.

### Pro tips on what is important for the future success of philanthropy networks:

1. Pay attention to the data-driven era and put effort into data development.
2. Be a great convener for networking. Try to encourage communication, sharing, collaboration and co-creating among people with different knowledge background, expertise and from diverse areas. Blurring the boundaries is critical.
3. Pioneering new models and topics, new knowledge and new products.
4. Pay attention to three trends that will bring new opportunities for us: New Economy, New Generation and New Technology.

A paper published by the Social Innovation Exchange/ SIX Funders Node<sup>13</sup> highlights more than 30 examples of how philanthropy is using data to address complex challenges in a number of fields. They include solutions which use predictive algorithms, data warehousing, artificial intelligence, machine learning, real-time monitoring and the internet of things to create social impacts in youth employment, child welfare, health epidemics and climate disasters.

Setting out a number of ways in which foundations can engage in data-related programs, the authors point out, however, that, 'very few big foundations have the capacity or technical knowledge to either shape innovations or make sense of which ones to back and when they do get involved they face complex challenges about transparency, ownership and ethics.'

This is precisely where philanthropy networks can step in, as one of their key roles is to further the capacity and knowledge of funders. The SIX Funders Node suggestions for funders are presented in the table below. Suggestions for philanthropy networks in supporting funders were developed for the purposes of this guide.

### Pro tips on collecting philanthropy data:

According to the **Global Philanthropy Data Charter**, these are key data points to be collected on philanthropy

For funding organizations:

- Basic organizational data – e.g., year founded, staff size, total assets, total expenditures, etc.
- How much funding are they providing for specific issues?
- Is the funding going to other civil society organizations or to operate foundation-administered program?
- What geographic areas are being supported by the funding?
- What population groups are being supported by the funding?
- What is the strategic purpose of the funding – e.g., general operating support, project support, capital support, technical assistance, advocacy and policy initiatives, etc.?

For implementing organizations:

- Basic organizational data – e.g., year founded, staff size, total budget, revenue model, etc.
- How much external funding are they receiving for specific issues?
- What geographic areas do they work in?
- What population groups are being supported by their work?

Table: Creating opportunities for data solutions

Suggestions from SIX Funders Node Report	How Philanthropy Networks can Support Funders
Funding social data projects through grants	Compile project opportunities (some refer to as 'deals') for funders to consider; vetted and pre-screened
Funding enabling environments for open data, data ethics	Organize advocacy initiatives with partners which members can take part in and/or fund
Convene others	Support foundations in convening different actors to discuss and create data hubs (public, private, research and NGOs) for various social issues
Support new datasets	Organize knowledge and practice engagements to help funders understand how datasets can be compiled to find and share best practice innovations in various fields
Give data as philanthropy	Broker relationships with companies and other institutions that may be willing to offer datasets and/or pro bono expertise in analysis (given the high cost of data and data scientists), satellite data, data processing technologies etc.
Create/support open data platforms	Lead initiatives to develop mapping projects on funding to help identify gaps and opportunities, track progress and explore cases. This is an activity which is particularly critical for philanthropy networks to take up
Integrate data into foundation operations	Broker relationships with software and data companies to offer solutions for more effective grant administration and other internal operations. Integrate tools for the network and offer parts of system for use by members (see the Maryland example).

**For the sector**

In addition to supporting funders to engage in data-related initiatives, philanthropy networks can take the lead in creating data-driven solutions that focus on increasing the transparency and effectiveness of the sector. According to the OECD report, *Philanthropy for Development*: ‘Foundations have an important role to play in achieving the Sustainable Development Goals, but there are two major obstacles in the way: the shortage of reliable and publicly available data about philanthropic flows and a limited understanding of foundations’ priorities and partnering behavior.’

This is just one of the more innocuous critiques of the philanthropic sector. Others are also loud and clear, as funders are coming under increasing pressure to demonstrate both transparency and impact.

Candid (GuideStar and the Foundation Center), TechSoup and other similar data-driven platforms are well known and applauded for their vision and practical utility in this realm. They work actively with organizations in the Middle East and North Africa, Sub-Saharan Africa, Asia and elsewhere to extend their benefits. They were also part of a consortium with WINGS, CENTRIS and other partners to create the Global Philanthropy Data Charter. The Charter is intended to: ‘act as a framework to guide organizations in the sector as they set out to gather or improve the collection of philanthropy data, while acknowledging the diversity of context, culture and legal frameworks within which these organizations operate. It proposes both a code of good practice to improve the working relationships of those involved in the philanthropy data “system” – data users, providers and collectors – and a framework for engaging other sectors (governments, multilateral agencies, the private sector, academia and civil society in general) in the sharing and use of philanthropic data for public benefit.’

Pay attention to three trends that will bring new opportunities for us: New Economy, New Generation and New Technology.

— Jaff Chen, Leping Social Entrepreneur Foundation

The goals are threefold. To provide or ensure:

- usable, high-quality data on philanthropic investments, activities, and outcomes;
- secure, sustainable global, regional, national, and sub-national systems for collecting and maintaining philanthropy data;
- sufficient capacity for organizations to participate in field-wide data collection efforts; access, analyse and draw meaningful conclusions from data; and apply data-driven insights to decision-making.

Another example is Open Philanthropy, an organization that openly shares all forms of data and research on a variety of topics in philanthropy to help funders make better decisions. Networks can tap into these resources as well as crowdsource information from their own members to feed such open-source platforms.

Gathering and reporting data on giving is without doubt one of the most valuable offerings of a network. It also serves as a critical input for thought leadership (especially in the ‘report back’ role) and for supporting advocacy efforts with evidence on barriers to giving as well as proof of the sector’s contribution to social and economic development.

### Example

In 2019, the China Philanthropy Big Data Research Institute (CPBDRI) was launched in Beijing. CPBDRI is an initiative of the China Foundation Center with the aim of applying comprehensive natural science and modern scientific means like information technology, communication tech, Internet tech, AI tech and mathematics to the field of philanthropy and eventually, to the wider civil society sector. The institute will also develop into a think-tank platform and explore the contribution of modern philanthropy to economic and social development based on the big data concept and technology.



Yet, gathering and sharing data is often a challenge. Many countries lack required reporting systems and/or centralized gathering mechanisms. Sometimes members themselves can be sensitive about sharing this information and it can also be expensive and can make demands on the capacity of the organization in question in terms of both the human and technical resources needed.

In cases where sophisticated data gathering is not possible, philanthropic associations can (and should) still publish annual reports on trends in the sector. Even if these are brief and not entirely based on raw or hard data, associations can highlight important accomplishments, opportunities and challenges in philanthropy on a regular basis. This will certainly improve its thought leadership position as a 'reporting expert'.

On the other side, there are risks involved in not engaging with digital developments. According to Lucy Bernholtz:

*'In the physical world, civil society is aware of the financial, contractual and accountability bonds that tie it to the public and private sectors. Much of the policy work that civil society and philanthropic infrastructure groups do is negotiate these rules and norms. Digital rights are existentially important to civil society, regardless of whether the community in question is aspiring to digital connectivity or awash in it. Now is the time to strengthen civil society's understanding and advocacy of digital rights and to recognize the role of digital rights groups as part of civil society's infrastructure.'*<sup>14</sup>

Philanthropy networks have a critical role to play in this field and should integrate these topics into their advocacy programs where possible.

## Conveying value

The previous section talked about ways in which networks can create value for their members and the sector. This section looks at how to best convey this value to their members - which many philanthropy support organizations express as a major challenge in their day to day work.

What is a value proposition, exactly? According to Wikipedia, it is 'a promise of value to be delivered, communicated, and acknowledged. It is also a belief from the customer about how value will be delivered, experienced and acquired. A value proposition can apply to an entire organization, or parts thereof, or customer accounts, or products or services.'

Members need a clearly articulated value proposition. If it's not relevant or clear, it is not seen as bringing value. Generalizing offerings is also challenging, yet, funders looking for bespoke services may also be reluctant to pay.

— Naina Batra, Asia Venture Philanthropy Network

Communicating this will boil down to how organizations can answer two main questions:

1. What makes your cause/organization unique and worthy of support for a particular organization?
2. How is aligning with your organization beneficial for both prospective donors and other members and for the philanthropy sector at large?

A compelling, unique value proposition sets an organization apart from others. It should not only persuade prospective donors to support the organization, but also explain how this support will make a difference, bring a benefit, or create an opportunity not found elsewhere. There are four key elements in conveying this value: who you are (values, purpose), whom you serve, how you serve them, and what you offer.

## Example

A good example of communicating qualitative outcomes of infrastructure funding is The Global Alliance for Community Philanthropy which published its summary of achievements (2013-2019) under three headings:

- Outcomes: Donor endorsement of a bottom-up and locally owned approach
- Added value: Of publications and guides that helped inspire better practices
- Wider benefits: Increase donor dialogue and discourse, more partnership brokering

### Communicating a value proposition

Communication and evaluation are synergistic activities. Evaluations are ways in which value is assessed, and have to main purposes: informing stakeholders (external) and promoting organizational learning (internal). Communicating results should be determined as part of an overall strategic communications plan.<sup>15</sup>

Deciding which results will be shared for what purpose is a critical element of communication, both internally and externally. While external communications are often prioritized, internal communication can be sometimes overlooked, but evaluation outcomes, especially those that reveal key insights for organizational learning and improvement, are particularly important for staff and board. Depending on organizational needs, this could also extend to other audiences. Integrating this information in staff and board meetings, internal reports and making time to collectively digest outcomes is critical to ensuring the organization is using the evaluation to improve its programs, revise objectives where needed and reassess organizational effectiveness (systems, procedures, tools, etc.).

Evaluation and communication are synergistic. They feed off each other to create a combined effect greater than the sum of their separate activities. When they are in alignment, organizations are in a much more powerful position to convey their value to the communities they serve and work in.

Often, organizations undertake such a wide variety of activities that they can be difficult to pin down and evaluate and therein lies the first challenge - gathering information about what makes an organization valuable! The temptation – and pressure from funders - is often to try and look at what is quantifiable, while neglecting the value of stories and cases, which can often convey much more than numbers alone. Advocacy and many other activities show their real impact over time; for example, what the passing of certain laws helped to enable in the sector, or what resulted from an affinity group on data, disability or gender.

There is a new movement gaining ground to encourage networks, members and others to share these stories of impact and communicate efforts to promote philanthropy and raise awareness, of which #LiftUpPhilanthropy

### Pro tips on communication:

- What is the best way to communicate our offering, our values?
- Who needs to hear this (segmentation)?
- What do they need to know about what we did/accomplished?
- What activities/results do we need to gather data on in order to report this information?
- How can we capture powerful stories about our work?
- What data can provide insights that can help us learn and improve our impact?
- Which results need to be communicated, which are for internal (staff, board, etc.) use only?
- How frequently will we measure and communicate results?
- In what format? Visual, audio, written reports, press, social media, etc.?

and #PhilanthropyWorks are a part. The key now is for communications and impact assessment to come closer together, so that networks increase visibility about activities but also with feature stories and cases of impact.

The following are critical considerations for philanthropy associations and networks before starting an evaluation.

**Purpose:** In its most basic form, evaluations help organizations understand what happened (outputs) and what results were obtained (outcomes).

**Outputs:** Reporting back to members, funders and other stakeholders on what took place, with common questions being:

- How many events, trainings, meetings took place?
- Number of attendees and scope (types of organizations, location, etc.)?
- Number of publications and other information sources created and published (if possible including metrics on extent of reach via media, social media etc.)?

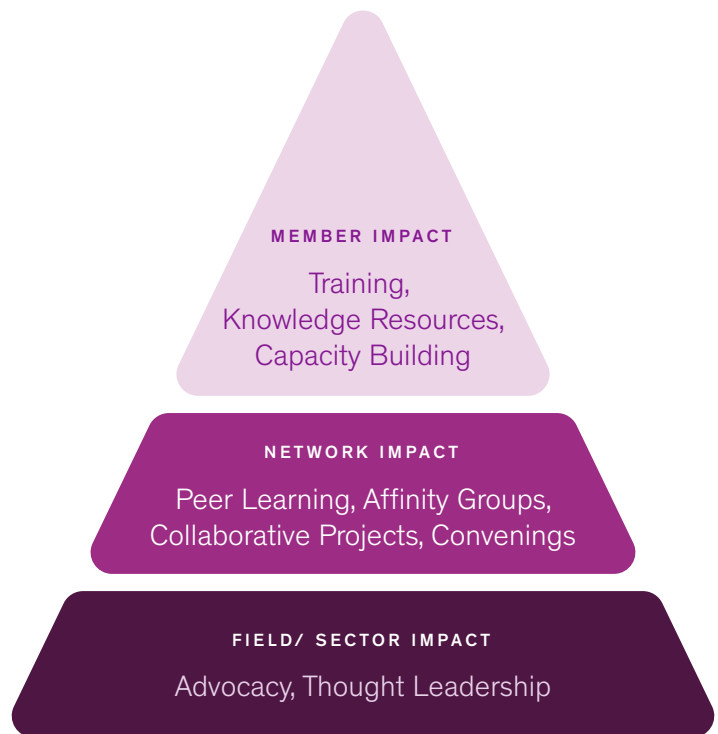
**Outcomes:** Obtaining insight for the organization and stakeholders on what results came from a set of interventions (activities, programs, projects), thereby also providing critical information for continuously learning and developing better ways of working to achieve goals. Some guiding questions may include:

- How did peer learning contribute to individual and organizational development of members?
- What did the association learn from the experience? What particular actions had a positive impact on the process?
- What possible outcomes can be linked to activities involving sharing data and research about the sector? For example, increased media interest/exposure, new policies?

Looking back at the value/voice framework in this guide, value propositions are often defined at three levels with different evaluation approaches for each.

- Increasing the organizational capacity of **members** of the network (new learning, innovative thinking, practices, tools) means understanding how members benefit from activities and how that translates into organizational effectiveness. Surveys, focus groups and interviews can produce valuable data. There are many evaluation frameworks philanthropy associations and networks can use to evaluate programs, which can be adapted for the non-profit field.<sup>16 17</sup>
- When promoting relationships and collaboration **among members** is an objective (peer learning, affinity groups, etc.), methods like social network analysis (SNA) to help understand the impact of networks can be very useful.<sup>18 19</sup> Partner, developed by the Visible Networks Lab, is a tool that is very easy to use, employing an online system to survey and visually map the depth, scope and impact of network connections.
- Philanthropy networks and associations will often aim to create impact in a particular **field of philanthropy** or at the overall **sector level** by amplifying voice. Advocacy initiatives, research projects and publications to promote thought leadership are common activities undertaken for this purpose. Establishing causality between what the organization did and what the impact was may be more complicated, but not impossible. Surveying and interviewing a broader audience such as peer organizations and policy-makers can be

Assessing levels of network impact



Adapted from the Interaction Institute for Social Change

useful (especially in the case of tier two and three collaboration approaches outlined in the section on collective impact below). Additional methods may require data points from communications metrics (how often resource materials and publications were accessed from the website, referred to in media, referenced in publications, etc.).

Assessing value of programs and services: The 4Cs

In 2018, WINGS and DAFNE launched **The 4Cs Framework**, based on four dimensions: capacity, capability, connections and credibility<sup>20</sup>. Studies are underway to further develop this framework into a practical method which philanthropic associations can use to set clear objectives and evaluate their work.

A brief description of each element is as follows:

**Capacity** - how support organizations generate money and other resources for the field. Through building this kind of capacity, support organizations can play an important role in changing the culture of giving within societies.

**Capability** – how to enable foundations to use their resources effectively. As a source of information, advice, networks share knowledge on a wide range of topics ranging from governance, management, evaluation and legal matters.

**Connection** is about relationships. Support organizations play an important role in convening, networking, peer learning and sharing, as well as providing a forum for action in pursuit of a common purpose.

**Credibility** is about reputation, recognition and influence. Support organizations build the profile of the field, enhancing understanding and status with governments and wider society by disseminating achievements and advocating for a supportive legal and fiscal environment.

There are three 'outcome areas' for each 'C', yielding a total of 12 outcome areas. An 'outcome area' is here defined as the zone where the support *organization wishes to make a difference*. See Annex C for the 4Cs Framework.

### Pro tips on communicating impact:

- Be clear about the goal of communicating impact, whether it's for the sake of accountability or to share what has been done.
- Demonstrate that the organization is building and learning and communicate how things have changed over time.
- Annual reports are good; numbers combined with stories, case studies and actual feedback is better. The end-product should take no longer than 15-20 minutes to read, and, to quote NPC: 'no stories without numbers and no numbers without stories.'
- Use social media, YouTube and other media to both share and crowdsource impact stories (from members and from other stakeholders that have engaged with your organization).
- Be careful about making claims to establish cause and effect of activities on outcomes and impact.

From organizations in the UK including New Philanthropy Capital (NPC) and the Big Lottery Fund on communicating results and impact.

### Pro tips on evaluation:

#### Rainbow Framework for Evaluation

- **Manage:** Manage an evaluation (or a series of evaluations), including deciding who will conduct the evaluation and who will make decisions about it.
- **Define:** Develop a description (or access an existing version) of what is to be evaluated and how it is understood to work.
- **Frame:** Set the parameters of the evaluation – its purposes, key evaluation questions and the criteria and standards to be used.
- **Describe:** Collect and retrieve data to answer descriptive questions about the activities of the project/program/policy, the various results it has had, and the context in which it has been implemented.
- **Understand causes:** Collect and analyse data to answer causal questions about what has produced outcomes and impacts that have been observed.
- **Synthesize:** Combine data to form an overall assessment of the merit or worth of the intervention, or to summarize evidence across several evaluations.
- **Report and support use:** Develop and present findings in ways that are useful for the intended users of the evaluation, and support them to make use of them.

Some resources for evaluation are uniquely designed for community-based organizations or networks, which can be relevant to PSOs. However, none of these tools alone readily lend themselves for use by philanthropic associations and networks which often need multiple frameworks and methods given the diversity of approaches undertaken in pursuit of their mission. Some kind of mix and match may be needed.

The precise content of any given outcome area will be defined by the organization's strategic priorities. The system provides a framework and the organization fills in the content to suit itself. If an organization does not work in any given outcome area, then there is no need to include it.

Section two

# Amplifying Voice



# Amplifying Voice

## Summary

According to the Value/Voice Framework, philanthropy networks often undertake two main activities to amplify the voice of the sector: advocacy, which is a more responsive approach (can be reactive or proactive), and thought leadership, a field-shaping approach (usually more proactive in terms of bringing new ideas, practices and approaches to the field). Engaging in sector focus activities can contribute to increasing know-how, visibility and collaborative skills of a philanthropy network. They can also be challenging in that they are often resource-intensive (time, money, skill); can spur conflict as they often require the organization to take a particular position on an issue; and finally, are more complicated to evaluate in terms of links between inputs, activities outcome and overall impact. This page provides a summary of topics and tips for amplifying voice and raising visibility in philanthropy networks.

### Advocacy

Members of the network should be aware that a critical role of the philanthropy network or association is to advocate for a more enabling environment, and that if and when the time comes, the organization may need to take action. Have shared agreements in writing about principles and conditions, as well as potential crisis strategies on how the organization will engage in advocacy. This will help organizations have some consensus on the approach to advocacy (active lobbying role, passive research/information provision role, both, etc.), and be prepared if and when the time comes to engage.

Having a strategic plan from the start helps to lay out the information, resources and relationships needed to make advocacy efforts successful. In some cases, it may be as simple as policy analysis and suggestions; in other cases, much more extensive research and know-how may be needed to both make the case and advocate for it.

Initiatives may not always be successful. Be proactive to ensure that the know-how and relationships established throughout advocacy initiatives contribute to the core assets of the organization no matter what the policy decision-makers come to in the end.

### Thought leadership

There are three approaches to thought leadership: insightful (vision-based), real-world (practice-based) and reporting (data-based). Philanthropy associations and networks can assume any one of these approaches depending on purpose, timing and topic. Some organizations might want to be more 'known' for certain approaches.

Beware of failure to launch: thought leadership is equally about content AND communications. Be sure to have funds and clear plans for communications (and evaluation of communication impact so you can see your reach!).

Priorities of members will differ. Some may not value thought leadership and others may push for it. Try to position the value of thought leadership to the sector but also for members. Framing is key - be clear on decisions over the value of negative versus positive framing of a particular issue. Ensure resources are planned for content production (e.g. the guide) as well as communications - as it is the content and the delivery that positions organizations as thought leaders.



## Advocacy

Advocacy is a fundamental activity in many fields of philanthropy and civil society, especially for those which have a systems change, social justice philanthropy approach.

It is also considered to be among the core functions of philanthropy networks and associations, and in some cases, was the catalyst that initiated the formation of the network. In other cases, advocacy initiatives emerged as a result of a particular issue that required action. And some networks have yet to engage in this activity for reasons which include lack of technical expertise, fear of reprisal and being perceived as 'too political'.

In most countries, funders are recognized as important actors of social change, and in the provision of social goods and advocacy of certain issues. They have quite extensive resources especially in cases where funds are derived from the profits of a particular business. Some foundations even have the power to reach and affect decision-makers directly, and make use of these relationships to further their own philanthropic agendas. As such, the philanthropy network or association is a powerful collection of many member voices. In some countries, leaders from philanthropic umbrella organizations are frequently invited to participate in conversations about the sector at the top levels of government, and influence public policy.

We are voiceless in shaping policy.

— Ingrid Srinath, Centre for Social Impact and Philanthropy, Ashoka University

According to WINGS Infrastructure in Focus 2.0 report, philanthropy support organizations have an increasing involvement in advocacy (70 per cent of WINGS members) which highlights this is a continued area of importance when leading networks. This is likely to be related to increasing reports<sup>21</sup> that NGOs and funders worldwide face heightened control and excessive or unwarranted restrictions. NGOs focused on democracy-building or human rights are most affected, but the crackdown also affects those active in other areas. Funders who support them face obstacles and administrative requirements or, worse yet, outright bans on funding NGOs. Of equal concern is the curtailment of organizational development (strategy, know-how, funding) that takes place as a result of restrictive environments. Rather than focus on programs and impact, NGOs are too buried under regulatory requirements and concerned about further restrictions of their work.

## Pro tips on advocacy for networks:

- On an ongoing (quarterly, annual, biannual) basis, track and document barriers to philanthropy especially ease of giving and state of philanthropic freedom and civic space. Be proactive and do not wait for a surprise from policy-makers!
- Encourage foundations and NGOs to display the utmost transparency and accountable practices to avoid negative public perception and attack. Reinforce arguments in support of philanthropy by countering negative narratives with positive case studies and evidence.
- Use evidence/analysis to understand the causes of restrictions; develop short- and long-term strategies to address them.
- Comparative analysis: collect comparative examples from countries in which regulations are more positive.
- Engage, collaborate and consult with government officials and legislators (including on cross-border issues, eg. FATF).
- Tailor messages that promote trust and support for philanthropy and civil society to different audiences that include, general public, media, policy-makers and diplomatic sources.
- Establish partnerships with other NGOs, platforms, businesses and corporations to join forces on excessive and prohibitive laws/regulations on giving.

Nowadays, the most successful infrastructure players are vocal champions and thought leaders who foresee and actively build the common future for the philanthropic sector.

I think belonging to an association has different connotations and advantages than coming together ad hoc. We need something to belong to, so we can interface with other sectors, share knowledge and practice on giving wisely. Like trade organizations, we need something to also represent the industry before government.

Pushpa Sundar, Expert in Indian Philanthropy & Author of *Giving with a Thousand Hands*.

The *Impact Case Studies*<sup>22</sup> report by WINGS documents how more philanthropy support organizations are undertaking advocacy efforts. In all successful cases, organizations took a 'critical friend' approach, meaning, they were critical of, but not combative towards, policy-makers. Their approaches are evidence-based and use extensive analysis to come up with strategic proposals. This can be difficult particularly in charged environments where civil society and philanthropy is perceived as being under attack. Neutralizing the space and focusing on technical expertise, on regulations, on best practice and international standards, rather than political ideology, can help encourage relationships and make lawmakers more receptive.

### The six-step approach

Many organizations undertake advocacy initiatives to protect and promote civil society and philanthropy. For the most part, designing and implementing initiatives requires some core competences<sup>23</sup>; however, approaches, strategies and methods depend on topic and context. Initiatives often serve at least one of the following purposes:

- Informing the development of international norms.
- Advocating for enabling regulations at local, national, or regional levels (this might be on multiple issues, not only those affecting the sector).
- Helping organizations navigate the legal environment in which they operate.
- Protecting NGOs/foundations from restrictive regulation.
- Engaging the public (raising awareness and image of philanthropy and civil society).

In 2019, WINGS and ICNL went one step further and developed a toolkit designed to increase the effectiveness of philanthropy support organizations in efforts to improve the legal environment. Below is some advice gathered from this toolkit and from the experiences of philanthropy associations involved in advocacy on how to start working in this area.

### Pro tips on staffing and funding advocacy:

- **Staffing:** For some organizations in which advocacy programming is a core part of the mission, an allocated staff member should be leading the work, in coordination with external experts and other stakeholders. In some cases the work is structured as a project in which case temporary staff may be hired. This person need not be a lawyer per se, but should have the analytical and strategic mindset to lead this work and also have good relationship management skills (especially with government counterparts).
- **Funding:** Such programs are often quite expensive and member fees alone won't cover them. In sensitive situations, foreign funding can further undermine the work; try as much as possible to resource the program from domestic funds and pro bono contributions. Also look to other NGOs who are doing advocacy work; their funders or even their funding might be leveraged.
- **Collaboration:** Look to the sector and other organizations to find how shared resources and efforts can increase impact. There may be other similar efforts taking place; Bar Associations and other legal aid groups can be of service; sometimes even private law firms, academic and other experts can be willing to contribute expertise.

Infrastructure organizations are more than just membership, but rather agents of impact, ensuring that our collective voice is heard at EU level as one of the stakeholders of civil society. Our challenge is to shift towards a collaborative paradigm to face global challenges. These are challenges that no foundation, regardless of size, can achieve on their own. We need to shift away from thinking of ourselves as a membership, and more a part of the work, as enablers and multipliers

— Carola Carazzone, Assifero<sup>24</sup>

## 1. Getting started: Have a plan

The main objective is to plan for the initiative. To get started, organizations can:

- create a strategy, plan, budget and team; identify which experts and groups need to be part of the effort; be sure to include not only legal experts but also communications experts;
- identify what evidence will be needed and where it might be found, the need for new research and/or use of existing studies to understand the context, and extent of the problem;
- undertake initial consultations with organizations to understand challenges in practice;
- create a list of potential coalition partners who have an interest in the activity;
- if possible, meet with decision-makers to co-create the plan and process.

## 2. Gather data: Analyse the issue(s)

The main purpose of this stage is to understand the gap between the current and ideal situations. To do this, problems and barriers in the existing legislation must be thoroughly analysed:

- Analyse the issue(s) along the legal, contextual (political) and practical (experiential) dimensions.<sup>25</sup>
- Use evidence and data to present arguments with practical examples, rather than just advancing theoretical concepts (perhaps engaging a respected law firm and/or academic to provide support and credibility).
- Research international best practice and standards (to inform the 'should be' scenarios in the next phase), and publish results in a report to be shared within and outside the sector.
- Publish articles, papers and/or books that inform key stakeholders and the general public (including the media) on the topics for which the advocacy is being pursued.

- At this stage, if government partners are willing, study visits to peers in similar departments of other (best practice) countries may be useful.

## 3. Map the issues: Prepare suggestions

Inputs from the previous phase can be used to prepare suggestions. Differing views on what these should be, the language used to convey both them and the current situation, the proposed recipients of the scenario report (only core coalition/project team or wider group) and how to incorporate differing viewpoints can be tension points during this phase. In membership associations, it may also be challenging to achieve consensus among members if the situation is sensitive. Finalizing the report can take time and require multiple rounds of discussions. Some approaches may include:

- organizing a consultation to discuss potential scenarios and solutions to regulatory issues;
- using the ICNL and WINGS framework example to guide an exercise on assessing issues on two dimensions: priority (urgent/less urgent) and duration (short/medium/long term), drafting reports that combine a clear declaration of the current situation and 'should be' scenarios with suggestions of how to move from one to the other;
- circulating the proposed scenario report among stakeholders for further inputs and agreements.

## 4. Find allies: Assessing potential for collaboration

This is perhaps the most critical step of all, as advocacy initiatives are only as powerful as their partners. As the ICNL and WINGS toolkit<sup>26</sup> for advocacy suggests, together with your team, begin to make a list of organizations who can be a potential changemakers or allies, and rate them based on the following factors:

power to influence, degree of interest, extent of knowledge (and specific expertise), possible actions to increase knowledge, resources available for advocacy, resources needed for advocacy and strength of opportunity.

## 5. Publish, disseminate, evaluate

Reports outlining the current problem and proposed scenarios can be shared with external stakeholders at this stage, mainly, but not only, the policy-makers (unless they are already a part of the core team).

Depending on topic and context, organizations may want to engage the media to create more public awareness (and sometimes pressure decision-makers). Caution should be used here, as policy-makers may feel 'attacked', making collaborative advocacy efforts more difficult. Tension points at this stage also include the concern of members of the association about publishing externally. They may feel uneasy about being associated publicly with an advocacy campaign and fear implications for their foundation (this may be especially true if the foundation is corporate in nature, specifically related to a particular family or group, and/or if there are other potentially conflicting interests).

Advocacy projects may not easily lend themselves to typical project evaluation and communications activities. Yet it is crucial to do this for two reasons: one is that organizations often forget to celebrate and publicize victories (if the political environment allows for this). The other is that evaluating and documenting and sharing both success and failure are critical to continuous learning and valuable inputs to future initiatives. The intensity of know-how and relationships gained during these projects are very valuable and sustainable assets to the philanthropy network/association.

## 6. Engaging with decision-makers

The degree of engagement will depend on the issue and positioning of the philanthropy associations. Some stop at 'informing'; others pursue more active 'lobbying'. This decision needs to be taken by the governing body and members, as, again, some may be reluctant to be visible and take a position opposing the government. In cases where engagement with decision-makers is less direct, reports may be published as white papers, or sent directly to government departments. In other cases, organization members may be willing to take a more active position, in which case more active lobbying strategies and activities can be applied.

## Common challenges

Particularly for member associations, however critical it is to ensure credibility and legitimacy, the process of consultation can be long and labour-intensive, as achieving consensus among many different points of view and different degrees of willingness to be critical or even confrontational are involved. Each organization and context are unique and must be taken account of. Ultimately, only the leadership and members can decide the path for resolution, but balancing their different views can be difficult. However, these potential challenges should be among issues discussed at the beginning of the process, to develop strategies for mitigating risks and challenges that may come up along the way.

Members should represent your interest but not be influenced by your interest. When your membership owns you your ability to effect change is constrained. Uber disrupted the taxi industry because they engaged a wider stakeholder group; unlike taxi trade associations, whose tables are filled with only drivers. The recent declaration of the Business Roundtable on creating value for stakeholders- not just shareholders- is yet another soft signal. Are philanthropy networks taking note?

— Andrew Chunilall, Community Foundations of Canada

## Thought leadership

Thought leadership is not a new concept in philanthropy; philanthropists and the institutions they created have been putting forward new ideas for many years, shaping many fields from environment to education to public health. As such, it is a natural assumption that philanthropy networks would do the same, as they are at the very hub of information and practice coming from both members and the rest of the sector. It is also a critical way in which organizations can convey their vision, values and identify.

At Arab Foundations Forum, we seek ways to have conversations around issues that face our sector, but we remain mindful of the context in which we have those discussions. Creating a space to convene and discuss pressing issues allows the collective to worry less about being perceived as dissenting or as the lone voice, and more unified and cohesive about concerns and recommended approaches for change.

—Naila Farouky, Arab Foundations Forum

Yet in some circles, there is emerging tension between serving members and serving the sector or field. In networks and associations, members are often the key driver of the agenda and direction of the organization and, accordingly, service orientation is seen as the organization's main purpose. Herein lies the beginning of the 'serve members or serve the sector' debate which underlies the thought leadership issue.

### What is a thought leader? <sup>27 28</sup>

According to the Nonprofit Marketing Guide, thought leadership is 'sharing knowledge and expertise to build your reputation as the "go to" authority, resource or expert. For nonprofits, it's a strategic program to become the brand leader for your cause, services and expertise.'<sup>29</sup> The guide identifies three types of thought leadership:

1. The **insightful expert** shares visions and inspires with what if/why not concepts
2. The **real-world expert** shares practical approaches and information based on extensive experience
3. The **reporting expert** constantly listens to the community, gathering information on what is happening and reporting it back to a broader community.

A philanthropic association can assume one or more of these thought leadership roles over the course of its work, depending on topic, purpose and timing.

## Examples

### Thought leadership among philanthropy networks:

- The WINGS and DAFNE 4Cs Framework is a good example of 'real-world expert' form of thought leadership in action within the philanthropic support space. Co-created by members, the framework codifies knowledge on functions of a philanthropic support organization and offers practical guidance.
- Synergos's Bridging Leadership is another example. As an 'insightful expert', founder Peggy Dulany began her journey by conveying the 'what if' of how inner work can help unlock greater social impact with her paper *Approaching the Heart of the Matter*. Other teachings and experiences from within the Synergos network eventually led to the co-creation and continuous development of the Bridging Leadership approach, which serves as the underpinning of their work within the Global Philanthropy Circle as well as with clients they advise.
- Community Foundations Canada Vital Signs initiative is a perfect example of the 'reporting expert' thought leadership model, using this vigorous data gathering and reporting tool to raise awareness of different dimensions of well-being in communities across Canada.

Thought leadership is not about being known; it's about being known for making a difference.

—Thought Leadership Lab

According to Denise Brosseau, founder of Thought Leadership Lab and author on this subject, all forms of thought leadership should seek to:

- **craft a clear scenario**, a vision of the future that the organization is committed to bringing about;
- **codify lessons** learned to easily share;
- **build a sphere of influence** by sharing a vision of 'what if' in many different contexts with stakeholders and build in those experiences and insights of others to make it more inclusive;
- **activate** advocates: community leaders, industry spokespeople, analysts, journalists, research groups or national partners who can champion their message to a much broader set of audiences by articulating what's in it for them;
- **be discoverable** and connect with those who can build on ideas, disseminate vision, activities and accomplishments through different means to reach as wide an audience as possible to increase credibility, strategic visibility and reputation and gain recognition as a thought leader.

Thought leadership requires well planned and coordinated communications to support it. The messages need to be clear, the intended target audience for influence should be defined (peers, clients, policy-makers, media, donors) and the format (written, spoken, both) and channels through which messages will be conveyed need to be determined.<sup>30</sup>

Nowadays, the most successful infrastructure players are vocal champions and thought leaders who foresee and actively build the common future for the philanthropic sector.

—Maria Chertok, Charities Aid Foundation Russia

### Priorities, framing and resources

All non-profits have a call to action for some kind of change in systems, behaviour, policies or services, whether this is defined explicitly or not. Thought leadership helps organizations publicize a vision of a desired future state, be more intentional about purpose, and use that intentionality to mobilize action. It does not always have to be critical and say what is wrong. Very often, it can put forward ideas and visions about what is possible. Given the increasing public pressure on philanthropy, sometimes this thought leadership is about taking some positions that are more critical.

Both formal and informal research among members of philanthropic associations indicate that members often have high expectations of the organization to assume a thought leadership role, but that there are several challenges and tensions involved.

**Priorities:** Members will want thought leadership (which quite often serves the sector, helping to create collective impact), but not at the expense of benefits to individual members.

In this case, the 'insightful expert' thought leadership role should be balanced with more practical thought leadership (real-world, reporting) roles. Creating practical guides and learning for foundation management and publishing reports on new forms of philanthropy (tools, techniques, and approaches) are forms of more practical thought leadership work.

For example, in contexts where institutional forms of giving are less well developed, creating models for endowed foundations, crowdfunding vehicles, giving circles and donor tournaments, initiating social enterprises, impact investments, community philanthropy can be game-changing and help to increase the modalities and volume of philanthropy. All of this is considered thought leadership and valuable for the sector and members of an association or network.



**Framing:** how do philanthropic associations balance what needs to be said with that members feel comfortable saying? This is a common source of tension. According to author Denise Brosseau, there are negative and positive approaches to frame visions of thought leadership. They can come from a **negative view** (what is wrong, what does not work, what sabotages success, what compromises performance, what hurts) or a **positive view** (what is right, what does work, what supports success, what supports performance, what helps).

Negative framing is often a powerful way to convey why things need to change, yet, it can also deliver messages perceived as critical, which can be difficult to accept by some members. An open discussion about how to resolve these tensions should be had with staff and board, as well as members.

### Pro tip on thought leadership:

Andrew from the Community Foundations of Canada takes a view, that philanthropy member associations and networks can become too insular, unable to hear other voices and explore new ways of thinking and acting. He argues that organizations should also be more critical of the sector and its status quo; that philanthropy can only increase in impact if it encourages questioning of its practices, assumptions and realities.

Thought leadership helps highlight the philanthropy support ecosystem as a critical element of civil society, not only serving but also pushing, challenging and moving agendas. Of course, PSOs are here to serve their members or clients and they should not abandon that role. But in following a thought leadership approach they will be constantly readjusting the balance between services and influence.

—Benjamin Bellego, WINGS

**Resources:** while expectations for associations to be thought leaders are often high, the cost of these efforts tend to be greatly underestimated. There are two common challenges. One is a lack of strategic communications expertise (people, skills, knowledge, tools) and the other is finances to cover the costs of this work. More often than not, thought leadership work costs more than the income from membership fees, and requires additional funding (from 'membership plus' support and/or grants). Raising this extra funding also takes time, as does reporting back to funders. This can feel quite distracting for the association which is likely to be already facing resource challenges.

Another scenario is that funding is obtained for the 'product' of thought leadership (the research, report, etc.) but does not have the necessary strategic communications support to bring that product to life, a situation known as 'failure to launch'. Members, funders and leaders of organizations should examine in practical terms what associations need to do to assume this role.

Philanthropic Networks provision of research, data and knowledge help to build an ecosystem for change and innovation among their members as well as a framework for members to articulate a coordinated and cohesive narrative.

—Erika Sanchez Saez, GIFE

Section three

# Mobilizing Collective Impact



# Mobilizing Collective Impact

## Summary

Collective impact is a mindset that places a higher value on the whole rather than the sum of its parts. This section discusses how associations can incorporate collective impact approaches that support greater value creation and more voice. It starts with the importance of landscaping and mapping the philanthropy support ecosystem, and takes a deeper dive into approaches to collaboration and cooperation to multiply impact at two levels: cultivating connectivity within networks (among core members and stakeholders) and fostering collective impact among other organizations (at the ecosystem level, with peers). This page provides a summary of topics and tips for generating collective impact in and among philanthropy networks.

### Taking in the view: Landscaping and mapping

Beware of the temptation to ‘bowl alone’. With high demands and low staff and resources, it can be easy to get wrapped up in one’s own world. Take a pause regularly to see what is happening in the field and sector through either a landscape or mapping study as appropriate.

These can be resource-intensive undertakings, or done more simply. Bringing together a group of organizations in a room to discuss and share reflections, combined with some simple desk research and a few one-on-one conversations can often reveal quite a lot about what is happening in a sector.

### Cultivating connectivity

Creating connectivity, alignment and coordinated action are three main functions of networks. While they are not linear per se, the connectivity element is the glue which binds members together, fostering the sense of belonging and community which is so critical to keeping members affiliated with one another and the organization overall.

Creating smaller sub-groups (affinity groups, working groups) is a very effective way to strengthen the overall network but it’s important to ensure that these groups

sustain connections with one another on a regular basis, to avoid too much isolation.

Managing small groups is a huge task for networks. Have clarity on purpose (content/goal), structure (start/end dates, modes of operation) and roles/responsibilities (member led, secretariat led, etc.).

### Fostering collective impact

Be wary of the philanthropy support bubble: schedule regular reflection sessions with colleagues and peers in the philanthropy support sector to talk about what you are doing and create opportunities for cooperation.

There are three levels at which philanthropy support organizations can engage with one another: basic (to enhance communication and connectedness), moderate (collaboration on specific initiatives) and complex (sharing and aligning under unique goals, working in a structured framework).

Collective funding platforms are increasing, supported by backbone support organizations (another term for infrastructure support organizations for a particular collective impact initiative). Being adaptive, results-oriented and influential are among the qualities that make these initiatives successful.

## Taking in the view: Landscaping and mapping

When Robert Putnam published the book *Bowling Alone*, he highlighted the critical role of social capital (trust, tolerance and helpfulness) in society, and noted the increasing preference of individuals (in Western societies) to 'bowl alone'.

The temptation for philanthropy networks to bowl alone can be quite high. Yet ironically, fostering collaboration and collective impact among their members or communities is at the core of their organizational ethos. They are formed to promote connections in meaningful ways, from sharing basic information all the way to supporting collective funding initiatives.

What is needed is a collective mindset, one that values the whole more than only the sum of its parts.

A very useful first step in adopting this mindset is to understand the sector and actors in and among which a philanthropy network/association is operating. This is useful for organizations and funders alike, as it helps to give a broader view of what is already taking place, thereby avoiding potential duplication.

Scanning the landscape and mapping the field are expressions often used interchangeably to understand what is happening in a particular sector, and who is doing what, where, how and with whom. While it is true that they share the same overall goal, there are two important distinctions.

One is the purpose of these studies: a landscape study offers a clear view of trends, needs, challenges and gaps. Mapping studies offer insights on existing actors in an ecosystem, what role they are playing, how they relate to each other and the activities or services they provide. These insights serve as valuable inputs to discussions at the staff and board level for organizations at any stage of organizational development.

The second is the scope of the studies. One level of analysis is the overall philanthropy sector, of the trends, needs and roles of actors. Another level of analysis is that of the philanthropy support ecosystem itself; the situation and trends of philanthropy support organizations (not only networks. These can often include civil society, social entrepreneurship and other areas). See Annex 1 for a detailed explanation of scope, purpose, methods and approaches.

## Pro tips building effective networks:

Four Principles for Effective Networks  
(from Wei-Skillern)

1. Focus on mission before organization. Effective network leaders build strategies that advance the mission even when they do not result in direct benefits to their organization.
2. Build partnerships based on trust, not control. Leaders depend upon shared values and trust rather than top-down controls and accountability systems.
3. Promote others rather than yourself. Network leaders exhibit a strong norm of humility above all else, sharing credit and foregoing opportunities for individual advancement and institutional growth and brand building.
4. Build constellations rather than lone stars. Leaders who catalyse successful networks acknowledge their weaknesses as readily as their strengths. The goal is to build the larger system that is necessary for delivering on the mission, not to become the "market leader."

## Examples

**The Global Philanthropy Report** prepared by Harvard Kennedy School with contributions from 20 research partners globally and funding from several institutions, among them the Ford Foundation which has long been a leading funder of philanthropy support and infrastructure.

Ford also funded a similar set of studies in Muslim-majority countries in 2004, in which TUSEV took part. As a result, the first-ever study on individual giving and foundations in Turkey was published and the funding also allowed TUSEV to formally launch a research program on philanthropy and civil society that continues to undertake studies on a regular basis.

Another example of landscaping the support ecosystem is the study published by WINGS and Ashoka University, examining how beneficial support systems are for philanthropy and NGOs in India based on a survey of organizations and their views.

WINGS is in the process of preparing guides on methodologies specific to philanthropy support ecosystem landscaping and mapping. See Annex D for detailed guidance on planning and implementing these studies.

### Landscaping

Scanning the landscape helps organizations understand what is happening in a field, not only in the institutions which comprise it (whether donors or philanthropy support organizations), but the influence on it of other sectors and even the public at large. It is a wide-angle view.

Organizations often struggle to gather information on the state of institutional and individual philanthropy, as well as the trends and challenges affecting the sector due to the lack of available data. Yet studies at the global and country level are quite often commissioned by organizations or funders through some kind of academic partnership. Reviewing global studies is a good place to start as it also provides information on organizations that are doing and funding this type of work. These studies focus on the donors and flow of money - how, where, what, why, when. They need not be conducted annually but it is useful to commission them at regular intervals, with a baseline to compare for progress or regression. Partnering with an academic institution and sharing outcomes and insights

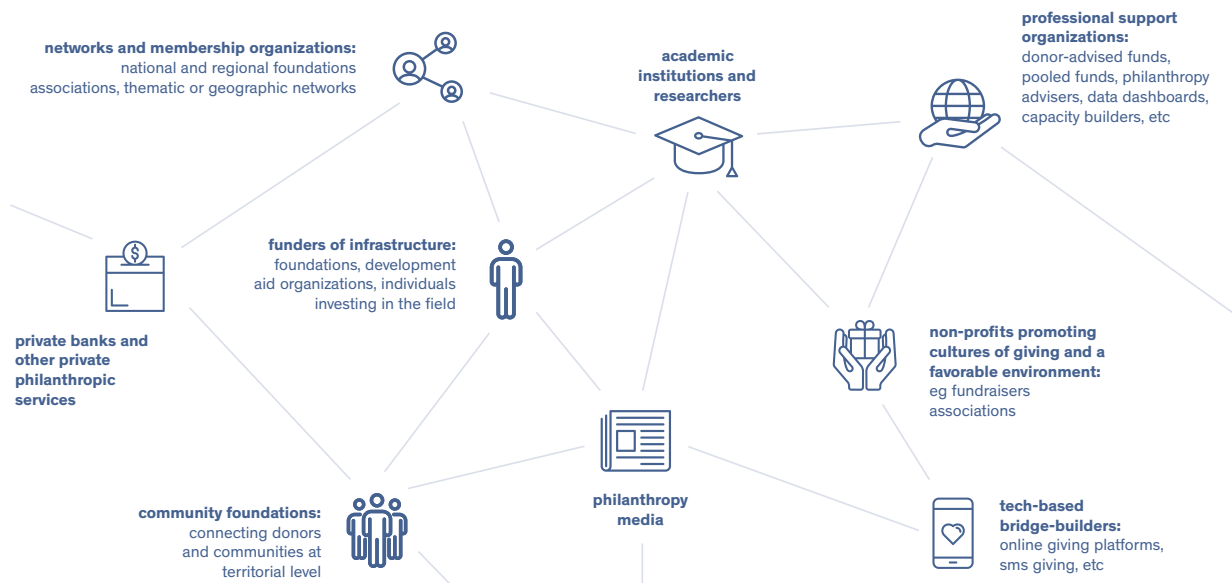
in a strategic manner is valuable in positioning the organization. See the thought leadership section of this guide for more on this topic.

Landscape studies of the philanthropy support ecosystem also take a wide-angle view, though focusing on the support organizations themselves. There are fewer examples of these types of study as they are still rather new, and many support ecosystems are not developed enough to warrant them. However, in the event, for example, that the philanthropy support ecosystem has changed dramatically, such a study could be useful to better understand the trends, concerns and needs of stakeholders to help define new roles and partnerships among organizations serving philanthropy, such as the case in Europe with the European Philanthropy and Social Impact Infrastructure study that was published in 2019<sup>31</sup>.

### Mapping

While understanding the landscape is critical, it is also important to have a clear mapping of actors in philanthropy and/or the philanthropic support sectors. Mapping is used to explore which actor or organization is doing what, how and how extensively. It is about connecting the various organizations and actors that are in the field of philanthropy or philanthropy support.

#### Philanthropy developers, enablers and accelerators



Adapted from WINGS Unlocking philanthropy's potential guide

crowded. India is another example: while there may be not be a formal donors association akin to those in other regions, there is a multitude of organizations in the ecosystem, providing research, advice and other services to a wide variety of stakeholders. Even where infrastructure is plentiful, problems arise. It can be hard to see the wood for trees. The distinction of one infrastructure organization from another is not always clear. Complexity can easily produce congestion making it hard for would-be donors to discern the most important organizations and where funding is most relevant and necessary.

In locations where the infrastructure support systems are less organized, there are likely to be fewer support organizations and perhaps less diversity among them. As such, the line between philanthropy and NGO support organizations is more blurred, and the support ecosystem overall is lacking in organizations that serve specific types of organizations or individuals, topics, or geographic areas. As these ecosystems are less clearly and formally structured, there are also fewer published analyses of them. A simple exercise and reflection with a few colleagues and some basic desk research may be enough to get a feel for who else is working in the same space.

### Example

An example of an ecosystem map is the Ashoka Turkey social entrepreneurship ecosystem map. While this is useful for understanding the different types of organizations which contribute to supporting the social entrepreneurship sector in Turkey and their relationship to one another, it does not focus on support organizations per se. A deeper level of analysis of organizations whose main purpose is support would be likely to reveal a much simpler, less complex map.

### Pro tip on relationship building:

Networks and associations can spend a lot of time and energy trying to cultivate relationships among members. Evaluating how relationships are developing is an extremely useful exercise to determine if and which interventions are working well or need to be defined. Visible Network Labs is an example of a tool that helps networks easily capture and map this information.

## Cultivating connectivity in networks

Creating meaningful connections among members is the *raison d'être* of many philanthropy networks and associations. Yet not all do so in a particularly intentional manner.

While some philanthropy networks and associations may be familiar with network science<sup>32</sup>, others may not have considered the wealth of information and insight in this discipline that can be applied to associations with the goal of 'intentionally connecting a system of diverse participants that trust each other and share common values, such as generosity and openness to sharing knowledge, can weave together individuals and institutions, providing access to the knowledge, skills, and support needed to move the sector forward.'<sup>33</sup>

Since many philanthropy networks have a centralized structure, secretariats serve as the hubs with members at the periphery. As the above quote from the Council on Nonprofits in the U.S.A. notes, this has many virtues, but sustaining all communications and activities among members can put pressure on the core team. It also requires the core team to be more intentional about fostering connectivity since without such efforts, the links can weaken. The paper published by the Council summarizes a wealth of resources on network building as it relates to this particular objective.

## Functions and practical approaches

According to Curtis Ogden of IISC,<sup>34 35</sup> networks should serve three main functions, which are not linear, but often progress in this order, to cultivate connections among members:

**Connectivity:** building on connections and trust to share or create new knowledge, develop understanding of the current state and systems; this is the very essence of the network which is needed as a strong foundation upon which other activities and partnerships can be grounded.

In a philanthropy network, the sense of belonging and connectivity often arises from places of convening; events, training, peer learning exchanges.

**Alignment:** aligning around current context, reality and goals; achieving conceptual congruence; creating and promoting shared values; coming to an agreement on the state of affairs, how terms and language are used both to describe the problem as well as the solution.

Networks often develop frameworks, methods and guides to help define and understand the philanthropy sector, to create a common lens through which issues are seen, discussed and addressed.

**Coordinated (collaborative) action:** engaging in advocacy, joint projects, coalitions and collaborations.

Fostering working groups/affinity groups, platforms for members to work together or fund specific issues is a common way for networks to promote coordinated action.

While networks go in search of value and voice, it is crucial to recognize how important this sense of belonging is to members. And when it is lost, the relationship to the network dwindles, too.

Philanthropy associations and networks typically undertake activities to promote connections and collaboration among members, quite often in the form of creating affinity or working groups. These are extremely valuable, as high-impact networks are known to have two characteristics: a large amount of clusters (made up of smaller, tightly knit groups) with short distances between them (connections between groups/members in different groups).<sup>36</sup> For example, philanthropy networks that have several clusters, which are in touch with one another (not operating in total disconnection, sharing experiences and information)

are considered to have characteristics of a high-impact network. Natalie Ross at the Council on Foundations, suggested this approach was highly encouraged as a practice that strengthens bonds and affiliations between members and the organization.

While there are several different forms of engaging members, an overarching methodology is the Communities of Practice approach<sup>37</sup>: 'groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly'. While there is some implication that communities are established for longer-term engagement, there is no restriction. Clear purpose and timing, along with other core elements mentioned above must be taken into consideration to ensure smooth starts, processes and closures<sup>38</sup>.

### Pro tips on setting up affinity groups:

- 1. Purpose:** What is the core purpose? To engage members on an objective set by the association, or on a topic of choice and interest?
- 2. Structure:** Who will be part of the group and what is the process of inclusion and termination? What are the ground rules? What is the timeframe? Is it project-specific or long-term?
- 3. Roles and responsibilities:** Who will be responsible for facilitating meeting set-up (date and technical), organizing agendas, sharing and compiling documents?

Many philanthropy networks take this approach, but not all have explicit guidelines on how to define and manage groups. This is advisable, as it ensures clear communication of expectations and function between members, group and the network secretariat. Below is a table that describes some common group forms.



Forms of affinity groups in philanthropy networks

Form	Description	When to use, basic characteristics and examples
Working group or project-based group	A group of members coming together to pursue a common goal	When <b>there is a specific task</b> ; for example, members funding gender equality would like to create a grantmaking standards document.
Community of practice	A group of members coming together to learn and share practices with one another	When <b>there is no specific task</b> , but a group of members wish to share and learn from one another's experience in a particular area. The newly-launched WINGS Funders Working Group is an example.
Affinity group/ Interest group	A group of members coming together for longer term cooperation	When a group of members <b>express the need to work together over a longer period</b> , for example, the European Foundation Centre (EFC) Disability Thematic Network. They have their own plans and budgets, are member-led and supported by the EFC Secretariat.

## Fostering collective impact

The ability of a network to create and sustain connectivity, alignment and coordinated action among its members is not always matched by its ability to do the same with its peers in the philanthropy support ecosystem. There are several cases in which networks are working in the same space, but not connecting with one another. However, networks can apply the same ethos and practical skills to cultivating connectivity with their members beyond their own networks, to develop and sustain relationships with their peers.

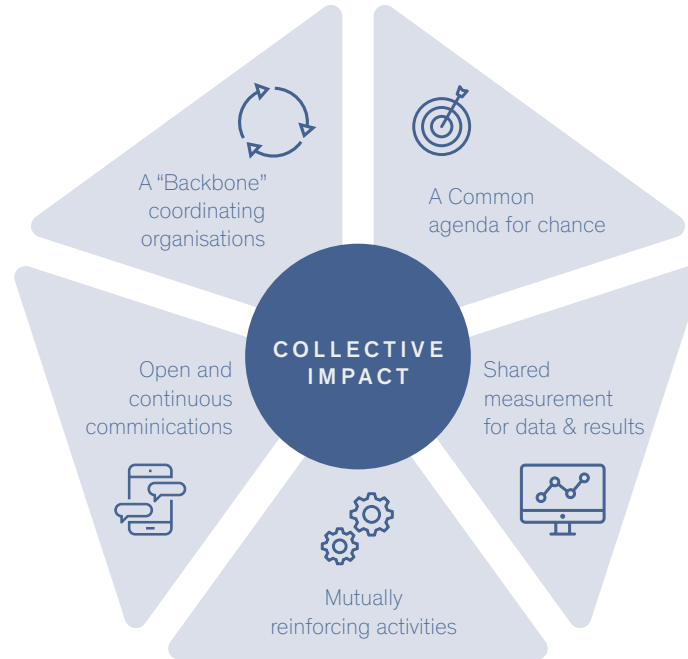
Competition is a necessary and healthy part of any sector and serves as a catalyst for improving organizational effectiveness and scale. Its darker side, however, can be destructive to relationships, organizations and a sector which depends on cooperation to achieve its effects.

Context will drive the timing, shape and approach to collaboration. Leadership and governance are also critical factors that determine openness to, and ability of, a network to work with others, so it is also critically important that they embrace the value of collaboration and collective action, and embody personal and technical skills which support collaboration and serve as an example for teams.

Papers published by SSIR<sup>39</sup> and others take a view of networks which differs from the customary one:

'Many traditional nonprofits form short-term partnerships with superficially similar organizations to execute a single program, exchange a few resources, or attract funding. In contrast, networked nonprofits forge long-term partnerships with trusted peers to tackle their missions on multiple fronts. And unlike traditional nonprofit leaders who think of their organizations as hubs and their partners as spokes, networked nonprofit leaders think of their organizations as nodes within a broad constellation that revolves around shared missions and values.'

Collective impact



Adapted from United Way Australia

### Basic, moderate and complex approaches

Of course, none of this is new to the non-profit sector; partnerships have long been both a highly valued and also a contested approach<sup>40</sup> for creating greater impact. Operational models and frameworks vary, and can be as basic as simple information exchange, coordination of schedules and activities, to more sophisticated initiatives with shared goals, measurement and alignment, all of which funders and non-profits have been doing for many years in many different ways<sup>41</sup>.

There are different levels at which philanthropy networks and associations can work with one another<sup>42</sup> and although the following framework is presented for philanthropy support organizations wishing to work together, it could also be applied by individual members of networks and associations.

For the purposes of this guide, it is useful to break these down into three levels.

**Basic** - enhance communication and connectedness to avoid duplication

**Moderate** - collaboration on specific initiatives

**Complex** - three or more organizations sharing and aligning unique goals, working together within a structured framework.

### Basic level

- **Create a space for interaction:** schedule quarterly meetings for leaders to discuss developments, opportunities and needs; share plans on programs and events coming up; keep channels of communication open and create a space to develop comradeship, trust and peer support – similar to the ‘connectivity’ philanthropic associations seek to create among their own members.
- **Become a member:** where relevant, seek membership in networks related to promoting philanthropy. Staying connected to peers and sharing perspectives on what it is like to be a member will offer valuable insights.
- **Communication campaigns:** #LiftUpPhilanthropy<sup>43</sup> is a campaign launched by WINGS specifically to raise awareness of the importance of funding infrastructure which allows philanthropy to grow and develop in quality and diversity. More than a communication campaign, it is a loosely organized movement proposing many ways in which philanthropy support organizations can promote awareness and value of their work.
- **Pursue win-win synergies:** for example, co-branding some programs that are similar in nature, combining major events, offering discounts for members that pay dues in more than one organization and, using the business lexicon, ‘cross-selling’ events, programs and services to one another’s membership groups.

## Moderate level

Collaborative action takes place when organizations work together on a particular project or initiative. For philanthropy associations, **advocacy initiatives** can serve as great opportunities for collaborative action. Philanthropy Advocacy (DAFNE and EFC) is an example, as it is focused on the common goal of creating a Single Philanthropy Market for Europe. This can also be a useful tool for networks helping their members work better together.

## Complex level

Collective impact initiatives are highly structured and intentionally designed to bring a group of organizations together in pursuit of a common agenda and vision. According to the Foundation Strategy Group (FSG)<sup>44</sup>, these are quite different from collaborations in that organizations are not necessarily working together on a common project. They pursue their own work, but do so in alignment with each other, sharing common measurements and reporting on progress in a way that helps to track the collective impact of a group of organizations in a particular field.

While there is no linear progression per se, these initiatives may come a bit later in the life cycle of the organization, as they are built on a strong base of knowledge, experience, connectivity and alignment among members established in initial years (as described in the networks section).

In a series of articles on this subject, Kainer and Kramer<sup>45</sup> refer to different ways of defining problems in the social sector and assert that adaptive problems require collective impact approaches:

**Fundamental** - can be addressed in an isolated impact solution, e.g. building a new school, buying or distributing more wheelchairs, and which require 'hardware' approaches.<sup>46</sup>

**Adaptive** - can only be addressed by a collective impact solution, e.g. addressing access and quality of education, youth unemployment. These require 'software' approaches

At the fundamental level, networks and associations deal with specific hardware issues, for example, building new training programs and knowledge resources for professionals in the field. This is an area in which philanthropy support organizations have worked together actively and are perceived to have been most successful (their own view and that of their members and funders).

## Guiding questions for collaborative action:

- What percentage of activity and membership overlap do the organizations share?
- Are there current or upcoming common goals that the organizations plans to pursue?
- What is needed to achieve these goals?
- Are resources among the organizations complementary (in terms of staff, know-how, networks, etc)? What could each bring to the table?
- Can the collaboration lead to more than the individual efforts of each organization?
- What are the pros and cons of collaboration?
- What are the risks and opportunity costs of not collaborating?
- Should the collaboration be time-bound or open-ended?
- Do the cultures and leadership of the organization align?

## Pro tips on impact:

Five Characteristics of Collective Impact Initiatives:

- Common agenda
- Shared measurements system
- Mutually reinforcing activities
- Continuous communication
- Backbone support organization

Four Principles of Collective Impact:

- Engage the community
- Advance equity
- Develop a culture of continuous improvement
- Leverage existing resources

Yet there are also issues that fall within the adaptive sphere. They are multi-dimensional and require cooperation among a complex web of actors, with specific strategies and approaches to achieve impact. Examples include advocacy efforts or the lofty goal of ‘promoting philanthropy’.

The timing of a collective impact engagement is an important factor. The likelihood of success increases when there is a strong base of experience and positive reputation as supportive, responsive and credible in the eyes of members and the philanthropic community. This provides the organization with the risk capital (social and financial) needed to invest in field-building work. Starting too soon may create challenges and tensions with members before the organization has the capability to address them effectively (see thought leadership section on challenges and tensions).

Another critical factor is the existence of a backbone support organization, which make collective impact possible, according to Kainer and Kramer<sup>47</sup>:

‘The expectation that collaboration can occur without a supporting infrastructure is one of the most frequent reasons why it fails. In the best of circumstances, these backbone organizations embody the principles of adaptive leadership: the ability to focus people’s attention and create a sense of urgency, the skill to apply pressure to stakeholders without overwhelming them, the competence to frame issues in a way that presents opportunities as well as difficulties, and the strength to mediate conflict among stakeholders.’

According to this description, backbone support organizations have characteristics very similar to philanthropy networks and associations, focusing specifically on the principles of adaptive leadership. The authors point directly to the need for, and value of, infrastructure organizations as ‘backbone support’ and also describe the many challenges of funding them which are parallel to those described in detail in the WINGS *Unlocking Philanthropy’s Potential* guide<sup>48</sup>.

The use of backbone support organizations may be more feasible in philanthropy support ecosystems where there is a large number of actors working at different points of the continuum to develop the capacity (volume, sustainability and strategic approach) of philanthropy.

## Examples

### Collective impact platforms

1. The SDG Philanthropy Platform is emerging into a collective impact initiative with WINGS as the backbone support organization.
2. The Arab Foundations Forum Youth Coalition and the Network of European Foundations (NEF) serve as a backbone support organization for a number of collective impact initiatives ([www.nef.org](http://www.nef.org)).
3. The Strive initiative in education (‘from cradle to career’ is their motto). Their ‘Creating a Theory of Action’ map lays out how each organization feeds into a broader system of common indicators.
4. At a more global level, the Paris Agreement is also an example of a collective impact initiative. Each country sets its own implementation efforts, but reports on common indicators of emissions.

## Pro tips on support organizations:

Backbone Support Organizations should keep the following main qualities and roles:

- Visionary; aligner of agendas to advance policy and ultimate goal
- Collaborative relationship builder,
- Results-oriented; establishes shared measurement practices
- Focused but adaptive, open to ideas but clear on desired outcomes
- Charismatic and influential communicator, builds public will and mobilizes funding
- Humble, servant-leader

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# Conclusion

This guide was inspired entirely by the practitioners from all over the world, who, on a hill 3,000 feet above sea level in Jamaica, developed a shared vision of success and sustainability for philanthropy networks and associations over the next decade. Their visions are summarized below, and serve as a perfect conclusion to this guide and call to action for building (or rebuilding) organizations which are undertaking the important work in strengthening philanthropy across the world.

Philanthropy support organizations have important and enhanced roles to play in the following ways:

## Generating more value for network members and the field by:

- Putting members at the centre in the reinvention/re-imagination process by asking them what they want (through surveys, focus groups, questionnaires) and being transparent
- Having a very clear value proposition, being attractive and responsive to members
- Drawing learning from members and providing learning to them
- Providing training on key topics concerning funder organizations
- Being digitally enabled; using technology as part of the design of member services
- Being the 'platform for apps, not the app itself'
- Assessing and communicating the impact of associations on the sector and society

If we can fall in love with serving people, creating value, solving problems, building valuable connections and doing work that matters, it makes it far more likely we're going to do important work.

Seth Godin, American Author

## Amplifying the voice of the philanthropy sector by:

- Being diverse, inclusive and representative of the society members are drawn from, in terms of gender, race, religion, socio-economic background, and of foundations and funders of different types and sizes
- Having an ongoing dialogue and, when necessary, a strong voice with, government
- Taking a long-term view, striking a balance between serving members and staying relevant to developments in philanthropy (thought leadership)

## Creating more opportunities for collective impact by:

- Conducting necessary landscape and mapping to help avoid duplication and tap into each other's strengths
- Becoming intentional communities, not silos, talking to each other without 'labelling'

- 
- Cultivating a membership that is contributing and collaborating, not only receiving
  - Assuming a coordinating/facilitating role, and adding value through dissemination
  - Adapting and preparing for the future and viewing infrastructure as support for the whole field as opposed to only for individual organizations
  - Creating alignment within their ecosystem; working in a more interconnected manner
  - Working for a sustainable sector, not just a sustainable organization

It goes without saying that there are far more visions of success and sustainability than there are challenges and restrictions; and this is the energy and enthusiasm which keeps networks moving toward the future. Yet the following were also noted as being necessary to realize the shared vision:

- Dedicated and talented staff
- Democratic systems of membership and governance
- Establishing evolving institutions that can continuously learn and grow
- Financial sustainability and diversified income (i.e. fee-based service)
- Strength and balance of relationships with funders, without fearing negative impacts on sustainability

There are many networks and associations yet to be formed in different parts of the world. They may look at this statement of vision with excitement, and this guide may inspire them to create organizations for the future.

Others may have been working in organizations for 10, 20, 30 even as many as 70 years, and may be approaching, or in the process of, renewal. For them, shared visions of peers and the contents of this guide may offer the encouragement needed on the sometimes rocky path toward reaching new horizons.

Yet, regardless of the life-cycle stage of an organization, these are certainly times of change for philanthropy networks and associations. As with all transitions, it is the ability to embrace and manage the process of change which determines the success of its realization. As the Buddha said, 'Change is never painful, only the resistance to change is painful'.

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# Resource guide

These resources were put together during the writing process of this document. Sourced from Filiz Bikmen and WINGS network leaders, these publications, online resources, tools, and blogs serve as further reading to compliment this guide.

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- Hank Yuloff (2016), *Member Surveys: 10 Tips to Make Your Surveys More Effective*
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- Jerry McCoy (2018), *Best Practices for Monetizing Your eLearning Content*
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- Parker Sanders (2018), *Create Your Nonprofit Technology Plan: The 10 Step Guide*
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## Knowledge, data, and practice



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- Ellwood Atfield (2018), *2017 European Association Remuneration Report*
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- Otto Scharmer & Peter Senge (2016), *Theory U*
- PMI Podcast (2020), *Projectified™*
- Rockefeller Philanthropy Advisors (2020), *Tools for promoting philanthropy and implementing tools for increasing foundations' effectiveness*
- Steve Zaffron & Dave Logan (2011), *The Three Laws of Performance*

## Funding models

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- Beth Kanter (2014), *How To Think Like An Instructional Designer for Your Nonprofit Trainings*
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- Nick Morpus (2017), *9 Best Free and Open Source Membership Management Software Products*
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- Global Giving Tuesday Summit materials, *Building the international network of Giving Tuesday activists and implementing informational campaigns in different countries*
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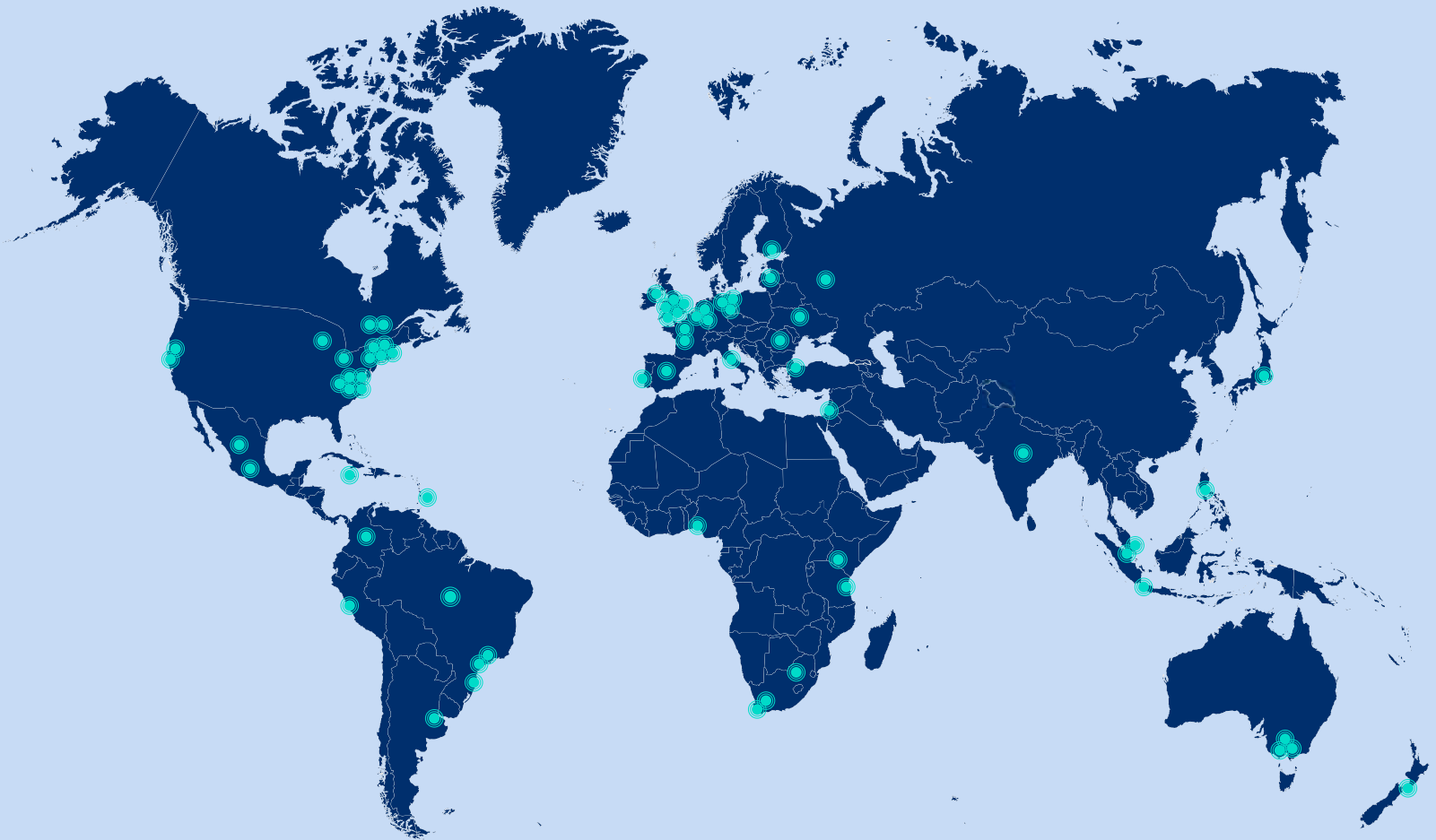
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# WINGS Members Map: Networks & Associations



**Total number of network/association members: 72\***

Number of network and association members per region:

- Asia-Pacific: 9
- Europe: 26
- Latin America & the Caribbean: 12
- MENA: 1
- North America: 17
- Sub-Saharan Africa: 7

Please see full list of WINGS association and network members by region in Annex G.

\* as of February 2020.

Visit [wingsweb.org](https://wingsweb.org)  
to view the interactive  
map of all WINGS members!

## List of members by region

### Asia-Pacific (9)

1. Association of Foundations
2. Australian Communities Foundation
3. Australian Environmental Grantmakers Network
4. AVPN
5. Community Foundation of Singapore
6. Filantropi Indonesia
7. Japan Foundation Center
8. Philanthropy Australia
9. Philanthropy New Zealand

### Europe (26)

1. Alliance of German Community Foundations
2. Ariadne
3. Asociacion Espanola Fundaciones (AEF)
4. Assifero - Associazione Italiana delle Fondazioni ed Enti della Filantropia Istituzionale
5. Association for Community Relations (ARC Romania)
6. Association for the Practice of Transformation (APT)
7. Association of Charitable Foundations
8. Bundesverband Deutscher Stiftungen
9. Centre Français des Fondations
10. Community Foundation Movement in Latvia
11. Council of Finnish Foundations
12. DAFNE
13. European Community Foundation Initiative
14. European Foundation Centre
15. Fondenes Videnscenter
16. International Venture Philanthropy Center (IVPC)
17. Net FWD / OECD
18. Network of European Foundations (NEF)
19. Philanthropy for Social Justice and Peace (PSJP)
20. Philanthropy Impact
21. Portuguese Foundation Center
22. Russia Donors Forum
23. SwissFoundations
24. Third Sector Foundation of Turkey (TUSEV)
25. Ukrainian Philanthropists Forum
26. YouthBank International

### Latin America & the Caribbean (12)

1. Alianza Peruana de Fundaciones y Asociaciones (APFA)
2. Asociacion de Fundaciones Empresariales (AFE Colombia)

3. ASPIRE Foundation Barbados
4. Associação Brasileira de Captadores de Recursos (ABCR)
5. Caribbean Philanthropic Alliance
6. Centro Mexicano para la Filantropia (CEMEFI)
7. Comunalía
8. Grupo de Fundaciones y Empresas (GDFE)
9. Grupo de Institutos, Fundações e Empresas (GIFE)
10. Ibero-American Network of Community Foundations
11. Impact Hub
12. Rede de Filantropia Para a Justica Social

### MENA (1)

1. Arab Foundations Forum

### North America (17)

1. ABFE: A Philanthropic Partnership for Black Communities
2. Biodiversity Funders Group
3. Chief Executives for Corporate Purpose (CECP)
4. Community Foundations of Canada
5. Council of Michigan Foundations
6. Council on Foundations
7. EdgeFunders
8. Emerging Practitioners in Philanthropy (EPIP)
9. Funders Concerned About AIDS
10. Global Philanthropy Project
11. Hispanics in Philanthropy
12. Human Rights Funders Network
13. International Funders for Indigenous Peoples (IFIP)
14. International Society for Third Sector Research
15. NEID New England International Donors
16. Philanthropic Foundations Canada
17. United Philanthropy Forum

### Sub-Saharan Africa (7)

1. Africa Philanthropy Network
2. Africa Youth Philanthropy Network (AYPN)
3. African Philanthropy Forum
4. East Africa Philanthropy Network (EAPN)
5. Global Fund for Community Foundations
6. Independent Philanthropy Association of South Africa (IPASA)
7. Philanthropy Leadership Network

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# Annex

## **Annex A: List of informants for this publication**

We would like to express our gratitude to the following interviewees who provided input for the document:

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Carola Carazzone, Assifero

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Andrew Chunilall, Community Foundations Canada

Natalie Ross, Council on Foundations

Gerry Salole, European Foundation Centre

Pushpa Sundar, Expert in Indian Philanthropy & Author of Giving with a Thousand Hands

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Chris Worman, Tech Soup

## **Annex B: Jamaica Driving Philanthropy for the Future Workshop Attendees**

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Gabriela Boyer, Inter American Foundation

Peter Brach, Brach Family Charitable Foundation

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Heidi Clarke, Sandals Foundation

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Jaime Matute Hernandez, AFE Colombia

Eugenia Mazurenko, Zagoriy Foundation

Anthea McLaughlin, Bridge Foundation

Douglas Miller, International Venture Philanthropy Network

Yvonne Moore, Moore Philanthropy

Jacinth Morgan Collie, Independent & CVSS Foundation Sector

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Polina Nyukhina, Ukrainian Philanthropists Forum

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Evans Okinyi, East Africa Philanthropy Network

Phyllis Ombonyo, Aga Khan Foundation

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Alina Porumb, INSPIRE Network of Strategic Philanthropy

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Natalie Ross, Council on Foundations

Gerard Salole, European Foundation Centre

Michelle Samuels, Campari Foundation

Erika Sanchez Saez, GIFE

Mariana Sandoval, Comunalia

Lourdes Sanz, Cemefi

Gilles Sassine, Papyrus S.A.

Suzanty Sitorus, Indonesia Philanthropy Association

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Anna Ward, C. B. Facey Foundation

Kevin White, JPS Foundation

Crystal-Gayle Williams, GraceKennedy Foundation

Christopher Worman, TechSoup

Karen Zacca, Sandals Foundation

## Annex C: The 4Cs Framework

OUTCOME AREA	DESCRIPTION	EXAMPLE INDICATORS
<b>Capacity</b>	<b>Building resources</b>	<b>Possible indicators</b>
<b>1. Volume of philanthropy</b>	The overall value of financial capacity and resources relating to public benefit investment or the use of private assets for public good. This could range from operating foundation outgoings, through social investment, to grant-making and giving by individual and corporate donors.	<ol style="list-style-type: none"> <li>1. Number of foundations.</li> <li>2. Total value of foundations.</li> <li>3. Average grant size of foundations.</li> </ol>
<b>2. Sustainability of philanthropy</b>	The duration of financial capacity and the propensity to ensure that there is a philanthropic investment in the longer term, provided by leverage of various types of resources, endowment or commitments to regular donations.	<ol style="list-style-type: none"> <li>1. Number of individual donors</li> <li>2. Number of businesses with associated foundations.</li> <li>3. Number of public/private/philanthropic partnerships.</li> </ol>
<b>3. Strategic philanthropy</b>	The commitment to the achievement of defined outcomes and impact, and the targeting of financial resources accordingly.	<ol style="list-style-type: none"> <li>1. Number of foundations with a theory of change</li> <li>2. Proportion of foundations that produce a strategic plan with associated budgets.</li> <li>3. Proportion of foundations that produce evaluation reports.</li> </ol>
<b>Capability</b>	<b>Building skills, knowledge and expertise</b>	<b>Possible indicators</b>
<b>4. Professionalism</b>	The conduct of philanthropy organizations and donors as established by the standards of practice, ranging from good governance through to operational behaviour and performance.	<ol style="list-style-type: none"> <li>1. Existence of a code of good practice for foundations</li> <li>2. Guides to grantmaking available</li> <li>3. Proportion of foundations that have feedback mechanisms from their grantees.</li> </ol>
<b>5. Knowledge of philanthropy</b>	The understanding of the philanthropy field and processes involved to effect change and adapt interventions to context and capacities of beneficiaries and partners.	<ol style="list-style-type: none"> <li>1. Number of published academic articles about philanthropy</li> <li>2. Number of publications of practical reviews of philanthropic practice.</li> <li>3. Number of academic courses that include philanthropy</li> </ol>
<b>6. Skills</b>	The ability to apply knowledge towards the fulfilment of tasks required to achieve philanthropy objectives.	<ol style="list-style-type: none"> <li>1. Number of foundations with human resource policies to build staff skills.</li> <li>2. Number of short courses available on how to effect social change</li> <li>3. Number of advertised jobs in philanthropy</li> </ol>

OUTCOME AREA	DESCRIPTION	EXAMPLE INDICATORS
<b>Connections</b>	<b>Building relationships</b>	<b>Possible indicators</b>
<b>7. Communications</b>	The processes of conveying coherent messages internally (within the philanthropy sector) and externally (in the public domain) in relation to philanthropy objectives and practice.	<ol style="list-style-type: none"> <li>1. Number of newsletters</li> <li>2. Number of coverings</li> <li>3. Number of webinars</li> </ol>
<b>8. Collaboration</b>	The processes of working with other stakeholders towards the achievement of philanthropy objectives, including those within the philanthropy sector and from other sectors (public and private).	<ol style="list-style-type: none"> <li>1. Number of partnerships between foundations.</li> <li>2. Number of affinity groups.</li> <li>3. Number of partnerships between foundations and other types of organization.</li> </ol>
<b>9. Influence</b>	The ability to inform policy and legislation (especially in relation to the enabling environment for philanthropy).	<ol style="list-style-type: none"> <li>1. Number of journalists who write about philanthropy</li> <li>2. The existence of an organized philanthropic lobby</li> <li>3. The existence of a parliamentary group (or equivalent) that focuses on philanthropy.</li> </ol>
<b>Credibility</b>	<b>Building reputation, recognition and influence</b>	<b>Possible indicators</b>
<b>10. Public support &amp; engagement</b>	Awareness of the general public of the state of the value of philanthropy (in particular in respect of risk capital, the testing of innovative approaches, addressing market and public sector service failure, and reaching people and communities that others can not).	<ol style="list-style-type: none"> <li>1. Proportion of the population in opinion surveys who recognize the value of philanthropy</li> <li>2. Affirmations from focus groups on the role of philanthropy in society</li> <li>3. Letters in newspapers about philanthropy</li> </ol>
<b>11. Awareness raising</b>	The level of consciousness and understanding about the value and impact of philanthropy and the approaches and processes involved.	<ol style="list-style-type: none"> <li>1. Number of blogs about philanthropy</li> <li>2. Number of articles about philanthropy</li> <li>3. Reference to philanthropy in parliamentary business</li> </ol>
<b>12. Transparency</b>	The openness of the philanthropy sector to public scrutiny, in particular in respect of governance and financial accountability.	<ol style="list-style-type: none"> <li>1. Number of open accounts of practice by individuals foundations</li> <li>2. Extent of public engagement in the affairs of foundations</li> <li>3. Existence of watchdog group</li> </ol>

## Annex D: Differences between landscape study and mapping study

	Purpose	Scope: Philanthropy Sector (Funders)	Scope: Philanthropy Support Sector (Support Orgs)	Methods/ Approaches
Landscape study-examining overall sector and trends	<p>Determining/revisiting strategic direction</p> <p>Uncovering new learning and emerging issues</p> <p>Informing practice of own organization and others in the field</p> <p>Identifying what is already being done and where the gaps are</p> <p>Obtaining information to avoid duplication</p> <p>Stimulating new learning and perspectives</p> <p>Gathering information on Individual and institutional giving trends and those of community philanthropy practices</p> <p>Understanding relations with other sectors</p>	<p>What are some pressing challenges facing existing and potential membership and/or stakeholders? (political, economic, legal, social, technical etc)</p> <p>How is philanthropy organized? How and how much are people giving (institutional, individual giving)?</p> <p>What are main areas of focus, investment, approach?</p> <p>What are the trends affecting philanthropy? Areas of progress? Factors of limitation?</p> <p>What needs for support are expressed by funders/ donors?</p> <p>What is needed to further promote philanthropy?</p>	<p>How are philanthropy support services/activities organized?</p> <p>What different types of organizations exist (membership, think-tanks, research etc)?</p> <p>What are main areas of focus and approach?</p> <p>What are the trends affecting philanthropy support? Areas of progress? Factors of limitation?</p> <p>What are their funding patterns/income types?</p> <p>Who are their donors and what are their views on the sector?</p> <p>Members and their views?</p>	<p>Desk research (previous studies, reports)</p> <p>Interviews, surveys and focus groups with other actors in the field (see graphic for example/types which can come from or be used in the mapping studies as well)</p> <p>Roundtable meetings to identify and discuss trends</p> <p>Designing and conducting original research (public opinion surveys and the like) to better understand the link between philanthropy and society/ citizens</p>
Mapping study-examining organizations and connections	<p>Identifying known/unknown organizations</p> <p>Seeing the sector as a whole, visualizing the depth/level of connectivity of relationships among organizations</p> <p>Uncovering opportunities for alignment, partnership, collaboration and/or collective action</p> <p>Insights that might help organizations decide to take on new roles, and/or leave some behind</p>	<p>Who is funding what?</p> <p>How are they related to each other (if at all)?</p> <p>Where are the strongest connections, the weakest?</p>	<p>Who is in the ecosystem, and what role do they play?</p> <p>Who is connected to whom, how?</p> <p>Where are the overlaps, where are the unique offerings?</p> <p>Where are the open spaces/ gaps in the ecosystem?</p> <p>How strong/weak are the connections?</p> <p>What patterns are emerging, what does this picture tell us about what needs to be done?</p> <p>How are funders/member connected?</p>	<p>Social Network Analysis</p> <p>Desk research (searches on organization profiles)</p> <p>Interviews to identify actors</p> <p>Activity based analysis; creating a matrix of activities, target groups to see overlaps/gaps</p> <p>Roundtable meetings to discuss results of network analysis (connections, activities)</p>

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## Introduction

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