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CONNECTION:

Shaping Profound Societal Change

Denver, Colorado USA July 30 – August 5, 2000

THE MILLENNIUM
CONNECTION

Global Co-sponsors:

Civicus
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Citizen Participation

InterAmerican Foundation

Philanthropy for Social Innovation Report on the Shape of the Future



THE INSTITUTE OF CULTURAL AFFAIRS INTERNATIONAL

CONCERNED WITH THE HUMAN FACTOR IN WORLD DEVELOPMENT

March 15,1999

Dear Colleague,

Re: Philanthropy for Social Innovation

First, we thank you for participating in this dialogue on the future directions of philanthropy. We will use these discussions as a screen to invite presenters and to guide discussions at the July 30 – August 5, 2000 conference in Denver, Colorado. Secondly, we thank you for sharing the articles found in the second part of the report.

During the review of the 65 conversations reported here, five distinct common themes of the future of philanthropy became evident:

- Social Entreneurship: Philanthropy and market forces are merging. People are talking of "social purpose business." Sid Mohn of the Heartland Alliance says, "I think the key for success is being competitive in the market place...my preference is to be judged in a performance way...to have the same measurement system as the for profits."
- Venture Capitalism: This is high accountability by donors and high involvement as a stake holder. Joseph Barisonzi talks of a stock market for the non-profits with bond ratings. The Jacobs Foundation moved into the community where it had funded community development and said, "this helped us move from just thinking hard to does it work and making it work."
- Foundations and Trusts: The number and quality of community foundations is exploding. Bruce Schearer, Synergos Institute, talks of how to build localized capital and structures not only in the United States but also globally. Goren Hyden sees the setting up of an "autonomous development fund" as the mechanism to rebuild the stock of social capital that has been eroded through donors' efforts globally.
- Community Based Assets: John McKnight's work at Northwestern looks at communities as asset rich rather than asset poor.
- Individual Giving/Volunteering: We need to figure out how giving works and how to engage new money, as well as what corporate citizenship is and how to promote understanding of and involvement in civil society in our communities, schools and work places.

We seek your reflections on the following report with any suggestions you might have. The conference will focus on the above arenas with the first two days looking at examples and organisations and the second two days doing action planning that would move us down the road in understanding how to engage philanthropy for social change.

Carol Pierce

Dick Alton

PHILANTHROPY FOR SOCIAL INNOVATION Stream documentation, Monday-Friday July 31 – August 4, 2000

INTRODUCTION

RELEASING HUMAN CARE: The Task of Philanthropy

Dick Alton, Secretary General of ICA-International and stream coordinator

The philanthropy stream of the Millennium Connection Conference is about finding the most effective ways to provide resources to communities – resources to shape their own destinies. People today are focusing on how to maximize resources to meet a need rather than injecting external financial and human resources into situations. A vital tool for developing local resources is the community foundation. People are seeking ways to give money that would make a difference to their own communities. While some foundations are focused on a particular community or geographical area other have chosen to devote their attention to specific social issues. At one time non-profit philanthropy and for-profit business existed in two fairly discrete worlds. A new reality, "social entrepreneurship," is emerging. A key dimension of social entrepreneurship is leveraging venture capital, startup capital, expansion capital and seed money to turn prototypes into businesses. This is approach calls for a major shift n thinking and operations on the part of non-profits as well as the philanthropic community. The underlying principle is that people give to results, not to charity. Everyone is a philanthropist.

OUR STREAM AND SMALL GROUP FACILITATION PROCESS

We varied in size from 35 to 65 people from at least 23 countries. The philanthropy stream worked in three groups. Individual Giving, the Private Sector and Foundations. Small group sessions began with presentations after each group discussed key messages. There was a team of ICA-facilitators available to facilitate and document the this work.

During these working sessions we addressed the following questions.

- What is the future of philanthropy?
- What does this reveal about the underlying issues facing philanthropy?
- What does this reveal about new directions we need move in philanthropy?

MONDAY, JULY 31: Presentations

• Lauren Casteel, Director of Donor Relations, The Denver Foundation

The Denver Foundation is a community foundation, with has assets of nearly \$200 million. They invest this help address current and future community needs and challenges. The essence of philanthropy is the willingness and desire to help other people. Philanthropy is strengthened and enhanced by the willingness to make connections across communities and across nations.

• Dr. Goran Hyden, Professor, Political Science, University of Florida

Listing some insights in philanthropy for sustainable development: the shift in development thinking from top-down to bottom up, from structure to human agency and from supply driven to demand-driven development. Focus must lie on sustainable livelihoods, an enabling environment and capacity building. Social capital needs to replace social dependence and external resources must be complementary only while they meet necessary contributions of beneficiaries. Independent, local funds need to be created: autonomous foundations.

Robert O. Bothwell, President Emeritus/Senior Fellow, National Committee for Responsive Philanthropy

Alternative Funding Institutes respond to specific needs of a local group. This Alternative Funding Institutions are putting more into progressive social movements in the U.S. than the mainline foundation world because they have specific fundraising focus and a different field of work. The methods of alternative funds are increasingly successful in the U.S..

• Wallace Goode, Assistant Commissioner, City of Chicago Mayor's Office Enterprise Development Works in Chicago to revitalize neighborhoods to community, public, and private sector partnerships to provide comprehensive solutions that involve technical assistance and partnering to foster self-sufficiency.

Ken Phillips, President, NGO FUTURES

Working as a fundraising expert points out that only well run organizations will survive. Organizations need to work on interest and skills for fundraising within the whole organization, while NGO's must become more business oriented – seeing donors as customers. All sectors need to work together, and need to support capacity building.

• Valerie Wright, Jacobs Center for Nonprofit Innovation

A family foundation partnering with community projects to commit intensive consistent efforts to build trust relationships and a true sprit of partnership with the local community through major investments of time, expertise and financial resources.

Nalini Gangadharan, Executive Director, Dr. Reddy's Foundation for Human and Social Development

The foundation believes in the inherent motivation and capacity of the human being for progress. The foundation is seen as the laboratory for catalyzing reproducible, sustainable, innovative experiments for social change.

• Marwa El-Daly, American University Cairo, Egypt

An exploration of the historical background of philanthropy in Egypt. Examines some of the current key catalysts influencing the institutionalization of private philanthropy:

Growing poverty, a widening gap between the rich and the poor, cuts in external aid and the growing role of the Egyptian private sector.

TUESDAY, AUGUST 1: Presentations

Latin America Philanthropy Panel-Gallery

- Linda Borst, Vice President, Inter-American Foundation
- Judith Arredondo, Corporate Specialist, Centro Mexicano de Filantropia
- Audra Jones, Corporate Specialist, Inter-American Foundation
- Laura Munoz, Coordinator of Development Programs, Fundacion del Empresariado Chihuahens
- Adriana Cortes Jimenez, General Director, Fundacion Comunitaria del Bajio

Inter-American Foundation is a independent federal agency focusing on sustainable devlopment projects and processes in Latin America and the Caribbean by disbursing grants in order to respond to local needs. It's working in partnership with civil society, business and society.

Yumi Sera, NGO and Civil Society, The World Bank

The World Bank is now realizing that funding should go hand in hand with community participation. One of their new approaches is creating a fund providing small grants to local community projects. The group gave advice on how to develop the program.

Elvie A. Ganchero, Philippine Business for Social Progress (PBSP)

Primary focus of PBSP is poverty alleviation through increases of income of families and community development projects. Improvements in the lives of people are needed before trust is given. An enabling environment is needed for successful partnerships.

Susan Overman and Amy Woods, CARE, San Francisco

CARE is a major international non-profit organization working toward the ending of poverty. After brief description of CARE, they looked at resource acquisition, CARE's structure for funding, the challenges and opportunities faced by the organization and needed cultural changes.

Dr. Martha Mvungi, Tanzania Culture Trust Fund

The trust fund is an autonomous foundation. The beneficiaries are part of design and implementation of the foundation's work. Integrity, moral authority and conviction are key to institutional success. Culture is a vehicle for community development

• Melchor S. Morales, Vice-President, College Assurance Plan (CAP), Philippines

Involved in village development and assisting in the training of community leaders to upgrade their management and leadership skills. CAP responds to the felt need of the community, the provision of primary tools for village development and supporting the role of the individual in doing demonstrating and advocating what can be done.

Dr. Tim Eing-Ming Wu, Director, Asia Pacific Public Affairs Forum, Taiwan

His work setting up two civil society organizations indicates collective good is a critical motivating force, zero budget opens doors to opportunities and building personal and institutional relationships are key to effective civil society development.

P. Barclay Jones, Program Development, Daniels Fund and Brian Thelstad, Denver Foundation

Working with venture philanthropy to create partnerships between donors and receivers that give opportunity to build effective relationships and grow towards sustainability.

• Dr. Emad Adly, UNDP-LIFE, Egypt

The aim of the program is to promote dialogue among all the stakeholders with the objectives of improving the living environment in low-income urban communities. This is done through authentic dialogue to mobilize resources, requiring local and national perspective, empowering all participants voices, starting small and replicating successful projects.

• Lepule Leboela, Eskom Development Foundation, South Africa-

As executive director works through he foundation to carry out projects in all nine provinces in South Africa. Work focuses on the mobilization of women and its implications for the community.

WEDNESDAY, AUGUST 2: Site visits and reception- Piton Foundation, Denver

All participants went on site visits of their choice, meeting with some of the local projects in social change.

In the evening the philanthropy stream was invited to a reception at the Piton Foundation in Denver. This foundation is committed to making grants that support community development in Colorado.

THURSDAY, AUGUST 3

This day was dedicated to action planning. We started in the sub-groups to discuss the work so far, the presentations and the group interaction. Each sub-stream came up with key revelations about the future of philanthropy, issues facing philanthropy and possible ways forward. We integrated these ideas in a plenary and focused on the key issues facing philanthropy.

Issues facing philanthropy:

a) Revitalising concepts, understanding and mechanisms of philanthropy

- Develop a common language of philanthropy, drawing distinctions among terms (e.g. philanthropy, social investment, corporate citizenship)
- How to expand and reconceptualise the traditional/narrow definition and image of philanthropy to become more flexible and encompassing

b) Increasing the capacity and developing systems of the NGOs in the trisector partnership

- NGO fundraising capacity is not strong
- Identify and strengthen the power of NGOs to make partnership equitable

c) Encouraging Giving (Talent, Trust, Time, Treasure)

- How to develop culture of giving
- Aging donor base
- Unsupportive local tax laws for giving

d) Changing Faces of Philanthropy: Challenges and Opportunities

- Face of philanthropy is changing: European/American to Global, from grassroots
- Old philanthropy vehicles are not responsive to the new needs and changes
- Different cultural perspectives
- How to transform donors to become responsible players in citizenship

e) To get beyond self-interest by building bridges based on ethics, values, confidence and trust

- Understanding the language of each sector (NGOs, business, Government)
- Political roadblocks e.g. corruption, strings attached
- Lack of trust amongst the three sectors
- Fear of the corporate sector usurping NGOs, Government and community based organisations of their role

Stream participants could sign-up for small groups each of which then worked on 1 of these key issues: the strategic challenges in philanthropy. All group discussed the present situation facing this issue, the key changes to be happening, the results that would show we will be there and key steps to take.

Group work on strategic challenges

Strategic ch	Strategic challenge: Changing faces & philanthropy-challenges & opportunities			
Key	- Changing attitudes: accountabilities of potential philanthropists and the recipients to better			
Changes:	understand the consequences of globalization including the globalization of philanthropy			
	- Prompting the growth & new forms of social investments that benefit common humanity			
	- Communicating to one another so that globalization is understood and the hearts &			
	individuals with money are touched – offer something that is target to the hearts & individuals			
	- Get the benefits & philanthropy to potential beneficiaries			
Concrete	- Evidence of community participation in the process of social investment			
results:	- Evidence of joint south-north philanthropy collaborations			
	- New funding mechanisms to ensure public accountability & transparency			
Key	- Let the shareholder meet the stakeholder and let him/her see the results (ICA facilitates)			
Actions:	- Utilize media to create awareness of philanthropy to & community need & problems			
	- Empower & overcome sense of hopelessness among poor communities through facilitation &			
	participation leading to consensus, creating opportunities for people to learn from each other			
_	- Create model programs and encourage similar programs to emerge			
Group	- Lepule Leboela (South Africa) - Hala el Kholy (Egypt)			
members:	- Anita Pisa () - Goran Hyden (USA)			
	- Nabil Azer (Egypt) - Simeon Shitemi (Kenya)			
	- Martha Mvungi (Tanzania) - Bing Ganchero (Philippines)			
	- Beret Griffith (USA)			

Strategic challenge: Revitalizing concepts understand mechanisms of philanthropy				
Key	- Cultural diversity and globalization needs a common language and understanding of			
Changes:	philanthropy, tri-sectorally and internationally			
Concrete	- Commonly understood and acceptable model(s) for philanthropic endeavour with a set of			
results:	standard ethics, values, responsibilities and rights			
Key	- Set up Country Representatives from this Conference to share and collect ideas and			
Actions:	information with and from others in their countries on the proposed standards. Feed this			
	information to Conference participants (explore using dotcom and the internet). Designate			
	international team from Conference to co-ordinate input and define philanthropy standards,			
	etc.			
	- Using Conference connections get speakers to share successful models and lessons with			
	private sector, through service clubs			
	- Set up web pages by issue for any Conference attendee			
Group	- Consuelo Aydee Gomez (Colombia) - Arianna Martinez (Venezuela)			
Members:	- Judy Harvie (Canada) - Susan Fertig-Dykes (USA)			
	- Judith Arredondo (Mexico) - Jane Stallman (USA)			
	- Adriana Cortes (Mexico) - Viviane Ambare M. (Cameroon)			

Strategic ch trust	allenge: To get beyond self-interest by building bridges based on ethics, values, confidence and
Key Changes:	 Cultural: the right to speak up be heard & respected; involvement of local participation Sectoral / Institutional: tri-sector trust-building → every partner trusts other; all sectors to be models of economic stability, environmental sustainability and social responsibility; shift of traditional / modern institutionalized philanthropy NGOs: NGO inter-linkages, network of ngos to invite other sectors to dialogue
Concrete results:	 Ngo's inviting other sectors to dialogue with a view to solving problems Local communities to become more vocal Management of the wealth of the country will be the responsibility & commitment of all sectors
Key Actions:	 Networking or integration of NGOs to create formidable force to move towards common goals More frequent conversations about distrust, corruption & ethics & values NGOs are practically inviting government & the private sector to policy discussion Formal avenues (education, exchange, training etc) to address issues of trust among all the sectors
Group Members:	- Chief (Mrs) Titi Abubakar (Nigeria) - Ruth Gilbert (USA) - Olusola Ajayi (Nigeria) - Marwa El-Daly (Egypt) - Justice Odili (Nigeria) - Audra Jones (USA) - Jan Hurwitan (Costa Rica) - Gloria Santos (Peru) - Eshrak Mohamed el-Sisi (Egypt)

Strategic challenge: Encouraging Giving (Talent, trust, time, treasure)			
Key	- Definition of philanthropy: giving time, trust, talent treasure as well as money		
Changes:	- Structure to teach children they have something to share		
J	- Everyone assumes personal responsibility to give/share despite their conditions		
	- Everyone gives and acknowledges those who give		
	- Get people involved in the work being done		
	- High profile people publicise philanthropy		
Concrete	- High profile people publicise philanthropy		
results:	- Conversations like this would begin with appreciative inquiry about what T is being given, rather than money		
	- When the four Ts are visible and measurable and provided at the local level		
	- Schools at all levels reward student involvement in community work		
	- Replicate structures that have been successful in businesses and places of worship		
	- Triple bottom line (economics, social indicators, environmental impact) becomes everyday language		
Key	- Change begins with me		
Actions:	- Ask for, acknowledge and share talent, time, love, trust and treasure: money will follow		
	- Support good practices (purchasing, investments, triple bottom line) in all sectors		
Group	- Margo Ganster (USA) - Don Elliot (USA)		
Members:	- Kathryn Smith (USA) - Laura Munoz ()		
	- Anne Bleaden-Castro (USA) - Lillie Fox ()		
	- Ellen Howie (USA) - Ann Yellott (USA)		

Strategic ch	allenge: Increasing the capacity and development systems of NGOs in the tri-sector partnership
Key	- From working in short range isolated ways, using "unbusinesslike" practices and reacting
Changes:	rather than advocating policy to working with a long range plan that utilises high disclosure,
	teamwork, partnership and best practice fundraising
Concrete	- Easy access to information, exchanging information channels
results:	- Government, donors, NGOs working together on quality projects
	- Involvement in policy making
	- Long range plans that are needs based
	- Access to resources to build organisational capacity
Key	- Involving tri-sector partners in planning, site visits, reporting and evaluating
Actions:	- Organise joint multi-sectoral training to reach common understanding for different issues
	- Review, update and document our mission statements
	- Research and information dissemination to all different actors at the same time
	- Plan for succession to the next generation (offshoots from bananas)
Group	- Edward Mutiso (Kenya) - Patrick Mbullu (UK/Kenya)
Members:	- Esther Damball (Tanzania) - Judy Lindblad (USA)
	- Blanca Ortegon (Colombia) - Tatwa Timsina (Nepal)
	- Khalel El Detrawny (Egypt) - Shizuyo Sato (Japan)

FRIDAY, AUGUST 4

On the last day participants worked on specific projects, to launch within the next year. These include:

- Sharing successful models using MC- private sector speakers
- A MC-PS Video
- Produce a book on best models of Philanthropy
- Establish an ICA fund
- Keep MC website up
- Building bridges worldwide
- Share info
- Giving and receiving from a conflict perspective (follow up)
- Australian indigenous cultural network
- Set-up an association of philanthropist
- National Conference on Peacemaking & conflict resolution
- Rural Empowerment Acceleration Program (REAP)-Nigeria
- Tanzania Culture Trust Fund
- Human Development Project-India
- Benchmarking Corporate Social Responsibility-Philippines
- Reforming Harambe-Kenya

Releasing Human Care: The Task of Philanthropy By Dick Alton

Finding the most effective ways to provide resources to communities — resources that allow people to shape their own destinies — is what the philanthropy stream of *The Millennium Connection* conference is about. In preparing for this stream, I interviewed representatives of more than 100 organizations. These included many of the larger and better known philanthropic organizations — such as the Kellogg, Ford and MacArthur foundations in the United States, Misereor in Germany, the Charity Aid Foundation in the United Kingdom and the Japan Foundation — as well as smaller and more local institutions, in addition to bilateral and multilateral agencies such as The World Bank. My main question was, "What do you see to be future directions in philanthropy?" Out of the myriad responses, a number of trends emerged which is to provide the dialogue points for our discussions. They include:

Development of local resources

Departing from a long history in philanthropy of injecting external financial and human resources into a situation to meet a need, people today are focusing on how to maximize resources existing within that situation. This represents a major paradigm shift from deficit to asset thinking. The work of John McKnight and others at Northwestern University in Chicago on identifying community assets has helped feed this trend.

The Ford Foundation has made this a major focus of its global work. As Elizabeth Campbell, Ford's Director of Community and Resource Development, explained, "The edge of our work is bringing to the fore local asset building through resource development, economic development and human skills, in order to resource community development." Ford's 15 offices around the world each has a philanthropy officer whose sole function is to focus on how resources from within a country have been, and can be, made available to civil society. Ford proposes to develop community-based institutions that mobilize and leverage philanthropic capital, investment, knowledge, skills, natural resources and faith in a responsible and fair way. Jennifer Vanica, Executive Director of the San Diego-based Jacob's Family Foundation, has described how this one-generational foundation has changed its approach to focus on developing a community's resources.

Rise of Community Foundations

A vital tool for developing local resources is the community foundation. In the last few years, the number of community foundations has increased substantially, as people seek ways to give money that will make a difference in their own communities, especially over the long-term. As Jane Stevenson, formerly of the Arizona Community Foundation, noted, "We are seeking long-term giving that will produce real change that has a long-term effect." Community foundations are well placed to do this, often by catalyzing collaboration among key players in a community. Donna Grant, Executive Director of the Community Foundation for Southern Arizona, underscored this. "Community foundations

are playing a strong role in allowing partnerships to form between the private sector, the public sector, and the community," said Grant.

Advocacy Role of Foundations

While some foundations are focused on a particular community or geographical area, others have chosen to devote their attention to specific social issues. In so doing, they have often taken over roles previously played by government. "More and more, foundations, not governments, are thinking through social issues," said Michael Marcus of the Chicago Community Trust. "They are being called to be advocates and policy designers." An example of this is the Bernard van Leer Foundation that is committed to bringing about innovation in global education through parental involvement. Van Leer spends most of its money on evaluation and impact studies, so it can add a critical voice to the dialogue. Said Executive Director, Rien van Gendt, "The key to the future is project documentation and dissemination of results that stimulate and build up civil society."

Need for Social Entrepreneurship

Non-profit philanthropy and for-profit business used to exist in two fairly discrete worlds. No longer. The wall is coming down and what is emerging is a new reality called "social entrepreneurship". There are a number of factors driving this trend, but central among them is the capacity of non-profits to be sustainable over the long haul, and the necessity to be productive.

As Rebecca Riley of the John D. and Catherine T. MacArthur Foundation pointed out, "Philanthropy is merging with market forces. We are seeing development move from the supply side to the demand side. What do local communities want enough that they are willing to pay for it? Without this, philanthropy will continue to provide programs that people neither want nor are willing to sustain." Sid Mohn, of the Heartland Alliance for Human Needs and Human Rights, adds another, more fundamental, reason for this change. "Non-governmental organizations must embrace a role as a social enterprise if they are to be change leaders rather than implementers of an externally imposed agenda," he said. [See p. 5.]

Importance of Venture Capital

A key dimension of social entrepreneurship is leveraging venture capital, start-up capital, expansion capital and seed money to turn prototypes into businesses. According to Jerr Boschee, President and CEO for the National Center for Social Entrepreneurs, "Earned income is the key. Sustainability without depending on outside funding is the biggest challenge facing non-profits," he said.

This approach calls for a major shift in thinking and operations on the part of non-profits, as well as in the philanthropic community. Part of this shift involves incorporating the vocabulary of the private sector. Joseph Barisonzi, Executive Coordinator of the Lyndale Neighborhood Association in Minneapolis, envisages an alternative stock market for non-profits in which people invest in organizations that give them both economic and social return. The underlying principle is that people give to results, not charity.

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The Role of Communities of Faith

Communities of faith play a pivotal role in "resourcing" civil society. In the USA, 70% of all social services are rooted in communities of faith. In many communities, faith institutions are the only stable organizations available to people. In other parts of the world, a similar situation exists. In many Arab countries, Islamic organizations are the catalyst of a variety of community-based initiatives and provide the bulk of social services.

Part of the work of Denver's Piton Foundation is helping clergy make the transition from saving souls to running social service programs, and helping them see the relationship between the two. Reflecting on the role of the church in society, Gary Cook of the Presbyterian Hunger Program said, "We need to help congregations to be compassionate and spiritual, as well as assist in transforming society into an integrated whole. The church is still a powerful force uniquely placed to do this."

When ICA colleagues in the Eastern United States gathered to work on the conference streams last year, they sent me the following note. "We discovered that everyone is a philanthropist." While not everyone has the same innate gifts, acquired skills, or accumulated wealth, we all have a sense of care embedded in our being. It's not always obvious; it's often thwarted. But it is one of the defining characteristics of being human. The task of philanthropy is to find ways to release that care in socially constructive and economically viable ways.

REPORT TO ORGANISATIONS PARTICIPATING IN A 1998-1999 SURVEY

PAGE	COUNTRY & ORGANIZATIONS/INDIVIDUALS
3	Egypt
	Europe
	NGO Futures
	Stichting Zero
4	The Philippines
	Associates in Rural Development
	College Assurance Plan(CAP)
	Philippine Business for Social Progress(PBSP)
5	Philippine Investment-Management Consultants(PHINWA)
	Philippines Rural Reconstruction Movement
	The USA
	Chicago
	The Alford Group Inc.
6	The Chicago Community Trust
7	Donors Forum of Chicago
8	Lloyd A. Fry Foundation
_	The Greater Kansas City Community Foundation
	Heartland Alliance
9	Imagine Chicago
10	The John D. and Catherine T. MacArthur Foundation
	Robert R. McCormick Tribune Foundation
11	The Seabury Foundation
12	Denver
	Anschutz Family Foundation
13	Business Development
	Catholic Charities
	The Francis J. Cole Foundation
14	The Colorado Trust
	The Enterprise Foundation
15	Gates Family Foundation
	Independent Higher Education of Colorado Fund
	The International Development Enterprise
16	National Civic League
	The Piton Foundation
17	Rose Community Foundation
	Minneapolis
	Lyndale Neighborhood Association
18	The National Center for Social Entrepreneurs
	Rainbow Research
19	New York
	American Assembly
	The Japan Foundation
	The Synergos Institute
20	Trickle Up Program
	The Victoria Foundation

20 Phoenix

The American Foundation
Arizona Community Foundation

21 San Diego

Hamilton and Associates

Jacobs Family Foundation

22 San Francisco

CARE

Fund Development Associates

William Randolph Hearst Foundation

23 Institute for Non-Profit Organizational Management Investment Achitects

24 Marin Agricultural Land Trust New Healthcare Foundation

San Jose Unified School District Foundation

25 Strategic Facilitation & Training
The Volunteer Center of San Francisco
Southern states

Colquitt/Miller Arts Council

26 Exxon Chemical Company
Habitat for Humanity
Dr. Goran Hyden

27 Presbyterian Hunger Fund

28 Washington, DC Ashoka Civicus

29 Global Work-Ethic Fund The Hitachi Foundation

30 Inter-American Foundation PACT Sherwood Shankland The World Bank

ARTICLES

- Genius at Work, Bill Strickland is reshaping the business of social change
- Virtuous Capital: What Foundations Can Learn From Venture Capitalists
- Reforming Foreign Aid to African
 Development: The Politically Autonomous
 Development Fund Model
- How Foundations Could Solve Social Problems
- Banking on Youth
- The New Landscape for Nonprofits
- Philanthropy in America

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- Christine W. Letts, William Ryan,
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 Review March-April 1997
- Goren Hyden
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- Ron Weber, Grassroots Development 2/21/98
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Does a lot of work with European organizations on fund raising. The edge of this work is building an organizational culture that allows board/staff/volunteers to love fund raising and to relate to each other in this task. Until a serious decision has been made and people and their attitudes prepared, there is no reason to do planning and look at knowledge of professional fund raising technology. Behind this has to sit tough management. Harder than helping people. Another key learning for the future is either the director or the board chair has to be really good. It is difficult for NGOs to move from program to fund raising. Moving from people liking you to people not liking you. In fund raising you have to learn to like the negative. By definition, fund raising gets a lot of "NOs."

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Started as organization that wanted to deal with a critical social need, education, that had also a major demand from across both rural and urban centers and developed a business to serve that need. They designed a college assurance plan in which if you put in a monthly amount, they will assure you of your college education financing. Last year they had 44,000 CAP scholars in colleges in the Philippines using their CAP plans. They are now No. 1 in the Philippines in trust funds, gross revenues and net income.

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Established by businesses to be a professional organization to enable poor people through economic empowerment. The key to their success has been to have a working board of 21 CEOs who are very active. PBSP does both funding of projects of other organizations as well as implementing their own projects – 65% other organizations and 35% own projects. The edge of their work is still alleviation of poverty but focusing on a wholistic approach in which they take into account the cycle of production, marketing and transportation. A key new strategy is look at the negative aspects of industrialization. They work in high growth areas and gauge the effect of industrialization. What is the effect on displaced people? What does industrialization do to communities? How does it affect slums? Previously worked mainly in rural areas. "We feel half our job is to just focus on how to promote corporate citizenship." Have 150 corporations involved with PBSP and we do a lot of training programs and consultancies as well as highlighting successful corporations with Corporate Citizenship Awards. They also work with USAID and the World Bank in promoting corporate responsibility.

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Were heavily funded externally. In the 1995 they set-up own endowment fund and have tried to mix diverse income from public, private and local sources. Do work with the government in reforestation. Have found private corporate support to be coming back now. Focus on building self-sustainable and self-governing communities through building local capacity. The question is how to solve under-development. We see civil society as about democratization of the space and the market, local control over local resources through such things as launching local banks. As we approach the Millennium, we need a global citizens' network reflecting that development rests in the hands of the people. Hopefully the ICA Conference will be sharing stories from below – the diverse initiatives that are slowly transforming the lives of local folks.

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We are finding non-profits selling social service (hospital) and setting up grant making in health. Being privatized. Good magazine is 'Fast Company.' A lot of articles on social entrepreneurship. The Donor Forum has a small loan fund for management assistance. How manage finances is a key issue. Boards are important in finances. A key issue is how one pumps up the volume and targets new markets. Need for thinking through marketing strategy, making a case for what you do. Have to know what can do as an organization. The universities are

figuring out how philanthropy works today (University of Chicago). Another great example of figuring out social entrepreneurship is Minnesota Radio or South Shore Bank who is totally committed to the community. Look at David Dadler's 'Champion of Change' (Harvard Business School).

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Teacher of inner city school, then a non-profit youth organization. In 1996 helped with youth political convention with ICA training the youth facilitators. Until people of disenfranchised communities can support their own projects, they need to learn how to communicate with outside supporters. Liberal guilt runs philanthropy. Philanthropy is a gentleman's game and is more and more business driven. There is a huge chasm between people who have money and those that do not. John McKnight work on asset community based is good as well as his new book, "Counterfeit Community". So much of philanthropy is tearing up community.

Huge issue is that philanthropy is becoming a big business/market. People want proof of investment. Need objectives if need resources and need to talk to people who have money so can get resources. Why raise money for new art center? Is that raising money for education? There is no goal that can give to. Think racism is a huge issue but hard to get people to talk about it -- why bother? Liberals don't want to discuss cost per kid or that the cost is so high that a family could never pay for it. Is not either/or but have to hold the tension between numbers and values. Need to shift from deficit thinking to asset thinking. Suburban kids have huge menu of possible activities that basically tell youth to explore their gifts and go for it. While inter-city kids have anti- pregnancy, anti-drugs, anti-violence programs which produces a whole different mind set. We need to push non-profits for young people as a way to make a difference not for people but with them. The Edgewater Community Council who allocates grants is a great example of what happens when power is given to a local community. America is not a civil society. Innovative at Stanford has done a study that shows that arts are the best way to reach youth or doing youth program.

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This is not civil society. This is Chicago. Most diverse religious community in the United States. More Hindus than Episcopalians. Incredibly diverse city. Philanthropy is big. 13% of the US economy is non-profit. Areas where explosion is the community foundations with

new tax laws and with new level of consciousness of big givers that it is easier to give to community foundations than start own. Growing consciousness of lasting investment in community foundations.

1. People want to see where money going, very targeted giving. New era is very geographical, focused giving.

2. Second thing is seeing 'who' is giving to 'what' is changing. More non-profits but fewer surviving non-profits. Going to see increased mergers.

3. Increased importance of "communities of faiths." 70% of all social services are rooted in communities of faith and is growing as they redefine their mission. Moving from small community action programs to major programs because only stable institutions can bring back the support of people who have left. Cutting edge is how we work more effectively with religious community

4. Family wealth and how to pass the money on is changing. World getting older with big 1st and 3rd world split. The 1st world is getting older and 3rd getting younger. But how are we passing money down the line?

5. Social entrepeneur is another cutting edge, but actually a long history of this. Seeing significant change here but still wrestling with what will emerge.

6. Another edge is how we do community organizing. We know power of many is more than one.

The thought process on social issues is not happening at the state level but rather at senior positions of foundations. Being called to be advocate and policy designers. Foundations are taking the lead in thinking through social change/social issues, how move issues forward. Have national 'affinity groups' focused on issues or best practices.

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Key is promoting philanthropy. We are least understood and known sector of society. Three-legged stool concept is not taught in school. Therefore we do not know or appreciate collective volunteerism. This is a front burner issue. Michigan has built curriculum on philanthropy/non-profits for K-12 with lessons on community service and skills and value of contributing back to your community.

Second burning issue is policy or non-profit environment. Need to extend reasons for people to give. Give incentive to give like tax deductions to all non-profits. Can really provide a social net. Also big push on social enterprise work like Bill Shore that give non-profits new images of how they can survive. Shore's line is think business. Or social ventures or venture capitalism with long term commitment (Public Allies). Don't be so rigid. Mexico Centre of Philanthropyso exciting what they are doing. Message campaign or image campaign, "What you as individuals can give and get from your community."

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Helping people help themselves is the foundation's mission. An innovative program of theirs is Urban Leaders Awards Programme. These are sometimes called "If Only" grants that focus on people who are seriously involved in something and find themselves saying "if only I..." Has been good because it has taken us into things we otherwise would have never considered.

Also new, have put out request for proposals in areas they want to push, to be more proactive. For them the cutting edge is Venture Capital where they have high accountability, someone from the foundation can be on the organization's board and actively pushing. Not like United Way where you just give but not say exactly where your money is going to go. It is active philanthropy. Not looking at same old problems in same old way but pushing to be grounded in real experience. Venture capitalism is involving of the donor, not passive but also clarity of relationship – talking of social capital generation.

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The public sector is responsible for core set of services. The well being of a state is tied to a state's resources. Must be careful that this care issue at the top of the agenda. The non-profits can fill the gaps and try new approaches but finally they only provide services around the edges of core public responsibility. Decade of the 80s has seen further privatization of social services. Private sector is competing with non-profit and has worked at guidelines for giving to private healthcare. Have to be providing help to under-serviced or non-served clients. Who is really calling the shots in mental health? 95% is private sector. Very few non-profits. Even find organizations changing their status. The political question is that we do not have a plan for those who are not covered and the numbers are increasing. We are heading for a two-tiered system.

And we can not leave health care in the hands of for-profits. Also putting health care in the hands of the for-profit has not increased access or reduced cost. Think the key for success is being competitive in the market place. Know what our core competencies are and continually leveraging more market share as well as developing more product lines and doing all this and still be committed to the poorest of the poor is the big challenge.

Social enterprise experimentation is an example. We are moving into "custodial services' business. We are providing employment. How market this to other buildings and not only our own. 50% of work crews are interns (long term unemployed) and 50% full time employed staff. Using jobs to help people re-enter the job market. But we are out to increase reputation as janitor service. My preference is to be judged in performance way. To have same measurement system as the for-profits. Not second class citizen.

This question is not a question of resource preference. Should child care be held accountable as any other for-profit? No! To suddenly have this capacity is just not realistic — asking people to move from survival to managing their own enterprise. We have to take an organic evolution of communities — build grass root leaders in normal community building mechanism is through the church and family. What takes their place in training about the importance of the common good and being committed to the common good? Drucker has argued we need a balanced sectoral commitment among private, public and non-profit. How all find space at the table — how balance spiritual life, social service, education?

Finally a sustainable community is not parochial. Realize connections to larger world. Sense the future is moving towards a threshold of change that may be tied to a spirit epoch. Increasing sense that things can not still be. Our political life – people announcing that it feels bankrupt. Education – not preparing our kids for global competitiveness. We don't know what basic safety net commitments are there. The split of far right and left in faith communities is widening. Is there another window about to be opened? Another 'war on poverty' to fight classism and poverty. Challenge for on-profits how to provide social service at same time doing social change in social policy – holding the tension. Edge challenge is being praxis organization that in doing and thinking is changing with services influenced by policies. How communicate within organization and society that change is both necessary and inevitable. We don't belong to historical city non-profits nor are we community based. We have community based philosophy with city wide work. For systemic change need to look way out.

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We are developing social capital by allowing people to really invest themselves where they live. The city is a spiritual project. Life in the city is meaningful. The goal of life is the city – the city of God. The goal of the church is the city as the project. Question is: Where is God's imagination at work in the city? How do we connect people's gifts to where they are

living? Raising up the vision of the city that would be self-propelling. Build the capacity of each person. Give greater attention to the future. Youth involvement allows the future to ask the question. Youth's presence is asking if they have a future. Expect people to be partners and will go where the energy is. When organize conference not get 'power' people but people who want to be there. Have to be asking the human questions. Millennium is symbol of opportunity to make a change, raises questions of transformation — is there hope? Millennium raises or makes a claim on our imagination. We know positive images of the future makes a difference. Future is really realm of freedom. What makes change possible is working on the future.

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Today, we have multi-millionaires with no background in philanthropy who are very confused about how to manage money and time, i.e. sports figures. What they give to is an extremely personal thing but also a reflection on who we all are – nurturing our personal passions. Foundations and institutions that are white and male and privileged have led the philanthropy initiative. They are elite organizations. But there is a huge gap between the 15% wealthy and the other 85%. What can be done to close this gap? How join two totally different eco-systems?

What you see happening in philanthropy is that it is merging with marketing forces. Here is a market – how will we capture it? Where do need and market come together? But pivotal is capacity of non-profits to be productive. Real innovation is to be strategic about leadership and organization. Non-profits need to know how to craft alliances. If had a magic wand and could change anything, would change boards. Some members seem to check their brains at the door. Need board training centers. Boards have impoverished understanding of non-profits and the richness of possibilities there are. Need a system to engage in thinking about non-profits. Suggest looking at Ewing Marion Kauffman Foundation in Kansas City MO, Philadelphia venture capital and Stearns Foundation in Chicago.

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What is happening? The family is under great duress with two wage earners. Women should have same opportunity but bad side effect is that the cost of housing went way up. Now you have to have two jobs to get a house. Second aspect of this change in the family (two jobs)

that you have to have a back-up system for the kids and you have no extended family to help watch the kids. You have to go deal with any emergency at home.

Next point, the workplace has to be a lot more flexible or family friendly. Best ambassadors for companies are their employees. Need corporate citizenship, but more important than corporate philanthropy need congruity between employees and customers. Now good early child education is critical. A study of early education showed it would cost way more than what families could pay to do early education program, so focused on quality end and how accredit early education programs with focus on the poorest part of society. Historically, foundations were interested in universities and then shifted to primary and high schools. The key to early education is understanding what children need between 0-5.

Now grant making:

- 1. Great demand for operational support of non-profits. If doing projects need operational funds.
- 2. Foundations need to be proactive in what doing. We have a strong evaluation section. We choose the non-profits we will work with because we know they will do a good job. We regularly have all our grantees meet together and share and get to know what each other doing. A lot less turf wars and helps us with policy formation and advocacy.
- 3. We have to reach the public. To do our job with early education, we have to reach the parents, raise public awareness, do opinion making. Have to reach commercial channels or otherwise foundations are just talking to each other. We need to talk to and with the general public. In our work with early education we came up with "10 things every child needs" and a teachers award program. Since pre-school teachers are being paid hardly any thing (as little as 14,000\$ a year), we did awards and put on TV focusing on these are the things you can do with your 0-5 children and even sold books about it.

Foundations should put 5% of their endowed funds in program related investment. If just took the largest foundations, this would be a huge amount of money. Also need to consider tax credit for investment in certain things, e.g. low cost housing. The universities are sucking up all the money.

What is 'civilized' society? What are 'civilized' values? Goes beyond education. Includes how we treat the less fortunate, the poor. Got to start to think how things go wrong, why things gone wrong and do our preventive work.

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50 years old family foundation started by parents. In the past every trustee knew the founder. Now although many grew up in area and know each other, the family now has many different interests and approaches. Never had policies because things were done over kitchen table. Is embarrassingly subjective to new generation and old generation feel being attacked. Now at

third generation, something new is emerging – a continuing participation of kids with many, many family members. Struggle has been with internal dynamics with family members all over the country. What holds organization together? Moving toward professionalism at same time trying to avoid excessive bureaucracy. Still be flexible and responsive, objective and subjective. Since family spread all over have tried to use a network model of grant reviewing. If family member gets excited about an arena, try to bring in more family members to hammer out guidelines. Like scholarships for older GED students. The financial aid has dried up until get back into system. We are looking for holes in the system. Then make funding available. Fostering local family involvement but not subjectivity but under some common umbrella. Family members all over country are working on same sector. All learning together about sectors. Staff has to feed them material.

Looking at venture philanthropy. Moving away from just give them money. Now way over to project management and involvement. Justify giving longer-term support with help in bench marking and exit strategies and more money. More committed and involved and learn a lot more. Before stayed at arm's length. Now coming around to limited partnership using venture philanthropy to help re-think project focus and follow work more closely plus multi-year grants.

DENVER

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We know that healthy incomes do not bred healthy civil society. Somehow civil society lost in the translation. It has been said that society can only focus on one thing at a time and that is the economic now. How change the way we live to be civil, to see positive aspect of life. We think of non-profits as driving old cars but having zest for what they do. The profits find themselves suspicious of their employees and many trying to find their way into non-profits.

One key is having social entrepreneurship that releases people's creativity. The issue is how do you have civil society or philanthropy as a daily practice. Do you vote? Right now we are driven by savings rather than giving. The associative dynamic is what drives society not whether government is replaced by market forces. The big issue is 'is man good or bad?'. My sense is that people are tremendously insular and have no curiosity of the rest of the world or how the global economy works, population growth, global warming or the Spotted Owl. The USA is heralded for its isolationism. We understand national disasters and respond but deeper issues, no. Not more social mindful but pressing for resources and basic control. Guess 10% of work force does not make it in world market.

Work is dignifying factor in society but we have marginalized both ends of system. Turn 50 years old and you ask yourself if-you have done all that you have wanted. Philanthropy world: non-profits being driven to income generation world i.e., Women Bean Project. Helping women in trouble/turbulent period to get into stable work situation. Worry about world of micro-credit.

Get into 'sustainable entrapment', doing low wage, piece work or 1 in a 100 will make it to next stage. Another edge is social venture capital, to manage for social profits. Need to ask who made a difference in your life? Did you ever acknowledge it?

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Non-profits need to learn how to market, to run a business, to have an advertisement budget.

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Rules of the game are changing. Our whole strategy is diversification of resources. We do entrepreneur work where we generate income that supports other work. Non-profits have to become creative in handling money. What is break-even point of every activity. Need 60/65 kids to break even at our pre-schools and we need to own the facility. Non-profits who have single focus of income are going to have problems. Donor interest lasts about 7 years than need to move on. No margin /no mission.

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The private sector and the government encourage investment and private sector involvement in dealing with social needs. Their work is forming family foundations and all that entails. Basic idea is that laws allows us to put our money and others who are like minded individuals to work on humanitarian work such as in the villages in Guatemala. They are assisting individuals to create new foundations for projects as well as new technology (investments to help the world). The government is encouraging people to invest overseas. Gives you tax help if you are more globally involved and encourages people to think in something other than dollars as we move towards one currency (Euro). What we see happening is a coming together of the world around a global economic system. The American family is the wealthiest family in the world and at the same time gives more to humanitarian and environment aid. The federal government encourages this learning how to be global investors. Need to think more globally than narrow local. The

church was the first line of defense in taking care of the needy. But for the last 30 years (since the depression) the state has taken over that task. The individual foundation work is re-looking at this issue. Tax-free wealth with interest going to charitable giving. Aggregated need up to 1,000,000 so can get return up to 25% on investment.

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Focus on the better health of the citizens of Colorado. Focus on unserved or underserved. Feel focus on millennium should be on population growth and changing demography, housing and the environment. They have focused on designing models that deal with social issues. All grants are part of internal facilitated proactive grant making strategy. After do project 10% of the funding is for making an evaluation and making these results available to the general public. Try to have the grantees in for regular discussions with the board as well as all grantees meeting every three months as a learning exercise. Educating boards is critical, especially the use of evaluations. They have funded the Search Institute's work on youth and feel it is edge work in seeing youth as assets and looking at what they need to succeed in life. Would like more data on European foundations.

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National non-profit that does contract services to city and does things like 'asset based' approach to community building (McKnight). This economic approach is bottom-up help for community development. Look at what can do at the bottom to mobilize resources. We need a healthy tension of outcome-based giving and mobilizing of local resources. Need outcome based funding — what do we get out of it? Future focus of philanthropy: long term commitment, venture capital. In Denver is a charter school that is community based, community rooted in which the parents are really involved. The school has become the hub around many other community ventures and ways to do other things. Ripples from a pebble thrown in the pond idea. Another thing that's time is right is social entrepreneurship (Bill Strickland — see first article in the next section titled "Genius at Work").

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They try to focus on what needs not being met and then act as conveyor or impartial broker to improve public policy. Take land and transportation as general issues. Help inform public of what have done right and where made mistakes. Help bring together the decision makers and keep the fire under them. See key role in creating public awareness and what are pieces that make sense. We are always focusing on where can have greatest impact and focus on them. The big shift in philanthropy is the role women play in shaping it. We teach women about giving. Women are shaping giving. Estates but are not things a woman learns from herr mom and women are not used to speaking up. Still a lot of old traditional ways of male domination. But a lot of women are now independently wealthy. May be major shift in philanthropy. Getting women to set up own foundations. Need a lot more understanding of the psychology of giving. Need to be a lot more sophisticated about giving. We are too simplistic about why people give. It iss not a simplistic marketing job. In the future we need a better balance of struggling to get money and taking next step in getting sharper about how do it. What need is a 5-year plan. Willing to look at innovation. For young people we need to develop a simulation/software philanthropy game. You are given 50 million to start a foundation. What decide to fund, how handle money, have unexpected emergencies. Do CD ROM. How do most radical good? How make things better?

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IDE is out to improve the lives of the world's poorest people through low-cost technologies that are made available through rural mass marketing. They identify new affordable incomegenerating technologies. They treat poor people as customers instead of recipients of charity. Each product is sold at a fair market price, including a reasonable profit for the local manufacturer, seller and distributor. Is an enterprise approach to development. Main focus has been with treadle pumps and drip irrigation.

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Key to realize that the 'public good' is not driven by the government but is the responsibility of all 3 sectors. We have to be clear that values win over data every time. Just the way it is. Decision makers are finally going to use values/beliefs screens to make decision and then find the data to support it. Key because is about ownership more than anything else.

Now, we need social change movement headed by all three sectors. The big shift is to inclusiveness, involvement and participation. But we are on the way to a new world and can no longer see the old world and the new world has not appeared and there seems so much chaos and panic is setting in. But no going back. The old social change was state driven, zero-sum game, old men's game. New social change is collaborative and coalition building. Style of leadership that is not standing in the spotlight. Key issue for them is race and diversity.

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A very innovative foundation is the TIDES Foundation in San Francisco. It is an operational foundation. The Aspen Institute has done real good work with fostering civic dialogue and participation and moving from 'we are right' posture. There are four types of foundations in the States – private foundations, family governed, public and a mix of all three. Public foundations have multiple donors and have a community board. Fastest growing foundations are community. Cleveland Community Foundation has over a billion dollars. The big change in philanthropy is that people are making money at early age and now want to do their own philanthropy, i.e. Soros. They work with 12 such individuals they advise.

Venture capitalists who want to be active as social entrepreneurs. Venture capitalism is real edge. Contract to do something and if you don't do it they fire you. This is most direct philanthropy. Another edge is corporate foundations. They tend to only be concerned with good public relations. But people like Levi Strauss and Schwab are changing what corporations can do. The Piton Foundation is a private operating foundation. We are more pro-active, more hands on. We have a living founder who wants to do philanthropy during his lifetime so is a blend of other foundations. The biggest network is Foundation Center with affinity groups. This is where ideas change. Foundations are a tremendous force for social change. Now in our publications we not only list grants but the results. In the last 20 years, philanthropy leadership is women and now people of color.

But, again if there is an emphasis in philanthropy it is the social entrepreneur approach by new money. These people highlighted in Time Magazine recently all have this social entrepreneur spirit. They are bringing this spirit to the non-profit world.

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Trend in philanthropy is more and more attention to capacity building in non-profits. Now foundations looking at infra-structure of a non-profit. Doing more involved grant making. Also stronger involvement in the programs. Get involved in the institution's funding. See individuals as much more innovative than organizations. Also new wealthy are getting involved and encouraging individual initiatives. The debate should be about venture capital or investment for social change.

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The new social entrepreneur focus is the merging of profit and non-profit approaches. They need product marketing – a whole new skill set of how to read the market, the emerging market. River Town Trading did this for public radio. Define outcomes and what indicates not getting job done. How hold oneself to some outcome whether private or public. Unions in Canada taking money out of investments and doing limited investment in venture capital. This is the cutting edge of community neighborhoods. Not a social service organization but we build community – that is our value added.

Use same vocabulary as private sector. Take returns — new philanthropist is concerned with stock market for the non-profits with value of " not giving it away". People are willing to invest in alternative stock market based on attracting investment to your portfolio, double rate of return with economic return and social return. He wants to develop a company that has a high rate of return so people would come to you to do national distribution and marketing. Core engine going to have is a magazine, the Urban Trading Post — Specialty shop that will take urban/rural revitalization to add value to community. Spin off and help global marketing mechanism. By summer of next year will have a board. Part of this will be data management for local communities.

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Work with NGOs and see the Center in a systemic way. Earned income is the key—sustainability without depending on outside funding is the biggest challenge. Organized abandonment is how kill programs. Need to shed programs and focus more. How stay competitive is to focus on what can do and understand marketing so can do more mission. Start by 15% increase of own income covering more of basic operational cost. Whole new business with skills and mentality we not have had before. Have been working with Habitat for Humanity in Ghana. Are working with 100 non-profits in identifying what calling 'social purpose business' sector. We must raise up the earned income. Venture capital idea — begin with start-up capital, then expansion capital and need seed money for proto-types to turn into businesses. This is the hard part and is what makes an innovation entrepreneur. It is merging with corporate social responsibility. Book, "22 Immutable Laws of Marketing".

Mr. Barry B. Cohen

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Used to be with United Way – taking money hand over fist with double digit increases. Is sociologist working with communities on how become more inclusive and works with 20 community foundations on identifying areas they need to work in. Private charity came about as an early way to care for poor. Then the depression was beyond the ability of philanthropist to meet. For the next 30 years, government/state delivered services and told people what to do. Starting in 80's devolved back to non-governmental organizations. Is a vacuum now but beyond ability of sectors to solve local problems. Key is what Peter Drucker said: people to do not give to charity but to results. Need evaluation programs for all grants that report on results of objectives. What would success look like and what would it look like if we had it? Opportunity to improve what you are doing. A good organization is the national network of Grant Makers in Washington and San Francisco. Edge in responsible philanthropy is how to invest charity dollars differently so it has an impact.

NEW YORK

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Synergos is a resource organization. How to raise money locally. Have developed from the ground up with four national community development foundations as case studies. See as 3 jobs:

- 1. Where get money?
- 2. Where does it need to go? and
- 3. How forge alliances and partnerships with other people?

Looking at transformative philanthropy. The central concern is fund raising. For us would be interesting to bring together key partners from the Southern Hemisphere – say 10 heads of these groups – for serious engagement with those the Northern Hemisphere. One subject or theme might be how to build localized capital and structure that gives focus and time. Look at capitalization of local foundations. How fund raise for endowments. Endowment building is an edge issue.

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Ms. Mary Coggeshall

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She is on the Board of the Victoria Foundation. This foundation is a community foundation that focuses on the environment. They prepare project proposals from the community and present them to the Board and others who are part of the Foundation. They then commit their individual resources towards the proposals that are presented to them. Very successful foundation

PHOENIX

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This foundation is building a family of foundations. They give directions and support to those who want to set up their own foundation whether it is an individual, a corporation or a family. Have a world foundation for global giving. Basically have set up a 'turn-key' process for setting up a foundation and are working with stock brokers and law makers to make this even easier.

Ms. Jane Hetland Stevenson

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For the general public the basic impulse is just giving. What we need is that the number of people giving reasonable, careful, thoughtful philanthropy to increase. We do not need short-term giving but long-term giving that will produce real social change that has long-term effect. The challenge we face is how do we work with a new generation of donors who are open

to new ways to think about giving. We need a new venture-philanthropy model where money is an investment that has measurable outcomes beyond "feels good". You know how you are really making a change. We need an 'asset' approach rather than a deficit one. Look at "individual development accounts" (IDA) which focus on self-help and controlling your own future. In IDA the bank holds the money and it can only be used as a group for education or housing and rotated through the group like with Grameen Bank work. Another edge is getting the different sectors to work together such as private sector and the public sectors. Yes, the cutting edge is to focus on how philanthropy creates social change that is real change. Look at Kenya Community Development Foundation and what it is doing. We need to get a critical mass to make a difference.

SAN DIEGO

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Former director of Food for All. Food for All links food markets with their local communities as well as supporting global projects.

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We have really narrowed down. We first were funding community development with pilot projects and had real success such as assisting 12 elementary kids to raise 2.6 million for a new school building. Now we are focusing on building direct relations with communities rather than paper relations. Have more independent relationship with clients and those trying to work with.

You are part of a community's ecosystem. In the communities we work in there is no sign of philanthropy. There really is a dis-investment in the community. Our foundation decided to be an investor by buying land in the community for our new office. We literally moved into the community and had the community help design the land and its use and hired them to build it. Have just focused on working directly with the community through hundreds of community meetings and setting up community task forces. We are directly involved in working with these teams such as setting up a construction company. Are helping to incubate new businesses through an investment fund. Have a 57 million dollar project of which we have only directly invested 3 million. Not top-down or bottom-up but how do you put the two together. See ourselves putting venture capital and philanthropy together.

Is this stepping over the line of the role of foundations? First we are doing what is necessary and then looking at the legal question. The question is how do you really listen to people and involve them in the decisions, how practice being a learning organization. We are talking of building long term capacity, a long term solution. Communities have plans but not long-term solutions. You have to invest in the economy and then make it work. The Jacobs Foundation is a one-generation foundation and has a sunset clause. Have taken six communities that are next to each other. We have villagers building own village. When you set yourself as a foundation apart from the problem you are part of the problem. This has to change. We are working proactively with the local.

Foundations argue they have to be objective but how can be objective if have only a paper relation. Everyone has a gift to give to the process and getting outside resources is part of getting everyone together. We are slowly changing the nature of the Foundation to be a real multicultural support team for the community. We are moving from just thinking hard to does it work and making it work. How bring non-profits and the profit worlds together? The profit is not worried about social impact and the non-profits are not worried about impact. Moving from feeling good to real social impact.

SAN FRANCISCO

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Edge of work: connecting individual values with organization mission; enhancement of individual involvement in local organizations instead of sitting in front of TV; collaboration and partnership and value added; addressing emerging issues; relationships; new methods and pace of technology use and social entrepreneurship.

Projects: research into why people give; building local leadership; joint ventures-collaborations; junior achievement awards for non-profits; visible creative examples of individual involvement;

venture capital model; development of marketable products and services that are mission driven; long term research and development on social topics and multisectoral, multi-institutional collaborations to deal with social problems.

New Images: young philanthropist; turbulent times or sustainability; value driven capitalism; new operational technologies with home offices, multi-tasking and information evaluation; self-help and using community assets and inter-connectivity, increase relatedness of everything.

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Social responsibility investment has done a poor job. They have crashed and burned. The direction we are headed is to go for big returns and through extra returns use for your own foundation. We have just had poor or rotten management on social investment. People want more than just giving money but political social activism such as Danny Glover with his many activities. We have been emphasizing women and philanthropy.

Another key concept is forming donor foundations. Individuals do not have to take on the trappings and administration of a foundation but still can give to what they are interested in directly. Also venture capital were you have a passion and want to see things happen. People want to make a difference. See a panhandler on the street day after day. Not going to keep dropping money in that bucket. Unbelievable amount of wealth created in last decade but want to do something that will have meaning.

We have formed a non-profit that matches women with non-profits involved with teenage girls. Have submerged corporate women's passion who want to reach back to prep a next generation of women. We have many more women that want to help than organizations than we know how to plug into an organization. The key is how to allow them to make a difference with the organization. The orientation program is critical. How to set up a beginning and ending of a project. Have high powered women in corporate world who want to pay back for women coming up.

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Helping local communities protect agricultural land as well as land for open space, water shed protection and social and cultural diversity. Develop funding for conservation easement acquisition.

Ms. Elizabeth Luna Mourning

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Has long background in philanthropy. Key for the future is taking a whole new look with the focus on what is the new shift needed for this new millennium. Particularly, we need to look at annual appeals and local fund raising.

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Have worked with IBM in a program called re-inventing education. Is a 5-year grant that is like a start-up capital which is investing in a new company. Need a lot of time to make it work with the help of your investor. The school has its own foundation — San Jose Unified Foundation that is just a pass- through device with its own board. Rose out of an annual celebration luncheon that raised money for the athletic program. Now the Board wants to do more and is involved in raising 3.5 million for a new culture building. The foundation has opened up new ways for doing business. The foundation has gotten 'out of the box' thinking to happen in the district. Corporate involvement is a challenge to figure out how they can help. Need to help build a vision of both education and business and a process that can monitor every six months. Creating a foundation really helps to put the practices in place for such collaborative projects. The foundation is also a vehicle for other fund raising efforts in the community. We also monitor public engagement in the schools. Use a 'climate survey' to discern how many parents are contacting the school. Intel Corporation has a great program in which they will donate money to a school for every employee who volunteers hours in a school.

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Great success in promoting volunteering in private sector – more and more as a whole department or a division. Volunteering is a team building event. Have a 'mentoring coalition' for organizations that are non-profits. They have needs and we find volunteers. We have a corporate volunteer council. Have a "board match plus" programme that is a list of non-profits who are looking for board members and what that entails. For the insurance industry, set up volunteer opportunities for a week helping make sure people show up and what volunteer for. Also have "after hours listing" that gives opportunities. Last year had 10,000 volunteers and 900 non-profits registered. Have a new 'youth service program' for children of the employees of corporations. The edge of their work is involving populations that do not usually volunteer and reaching smaller local organizations. They are also working now with high schools with "service learning" programmes. What is volunteer service all about?

SOUTHERN STATES

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Part of a family foundation – The Jinks Foundation. Is also on the Board of the Georgia Council for the Arts and the national organization, Center For the Book, which promotes public libraries and the co-founder of Swamp Gravy. The key for the future is how to get money as it is passed between generations to support the community level instead of large institutes such as universities. We need more community foundations and work like the Lilly Foundation is doing in Indiana where it will give up to a million dollars as a match towards starting a community foundation. A lot of new generation members of family foundations is a hope for a more social innovation approach. Just hard to get money at the local level. Part of the problem is education with a focus of foundations as well as procedures. Part of the challenge is to get people to raise money at the local level on an ongoing basis. Yes, there are resources here. I know it is painful to ask. Think the key is leadership. Need more seed money. We gave \$5,000 as seed money to hire an executive director and then her job was to raise the rest of her salary.

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Just about to finish his new book that is presently titled "Social Capital in the Peripheral - the Demise of African Socialism". Global philanthropy and how we manifest our concern is very appropriate. How do we enable social change or finance development in the global sense. Basically, in Africa we see too much disjointedness between donors and African reality. There is a break down of dialogue. The manifestation of this is that community self-help is gone. Distrust has set in. Any money is going into individual pockets. In a sense, democratization has been a curse. The responsibility lies as much with donors as the local country. The key to unblocking this situation is setting up 'autonomous development funds'. How do you combine local responsibility and the same time not leave the donors out. We need accountability and transparency for the donors and leaving a long term system in place that will carry those values on as part of society.

The idea is to set up a trust that has a board made up of civil society organizations, the government and the donors. Basically you are setting up a bank with the board made up of those partners. The bank would have a variety of windows: the main window would be for soft loans, another would be a commercial window and maybe another would be for grants. This trust/bank would be autonomous. This organization would create space for a professional fund. They would be as professional as possible at the same time they share the responsibility. The board would be elected and you would not be on the board just because you gave money. Is working with SIDA (Swedish) on the Tanzania Cultural Development Trust as a prototype design. There

is a Zambia income project that is being designed along these lines. The basic notion is that now social capital is being destroyed. If going to build it need new system that is a collaborative effort. This would also re-integrate government into development in a positive role. This would not be a sectoral thrust but a society wide thrust that reflects the involvement of all actors. Would actually bring competition of all three sectors since all can apply for funds. Basically it would say "Show what you can do." They all have to show results since many organizations are applying. Bring competition to the NGO/Private/ Public realms. Things would be more 'performance based aid'. The key is to create new space for such a radical change. This would reduce government's dependency on donors and re-establish their dependency on their citizens and tax collection.

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The gleaning laws of the Old Testament were society's laws for making sure the poor were being cared for. If take the intention of gleaning laws, you would be talking of the food stamp program rather than the pantry programs of the churches. Stamps are societal adjustment program and the pantry are non-profits response. During the Reagan years moved back to providing for needs on charity bases away from society care. Found ourselves moving back from working on the root causes and systemic analyses of why people left out of wealth system to treating just the symptoms. We now have the largest part of the churches working in food pantries. We need to focus on public policy, social services and community development. Our cutting edge work has to do with community development work and particularly affordable housing, micro-enterprises, job creation and building alternative economic systems. The question is how much buying into market system or how much out to create alternative to market system. Church in Baltimore is working with African products as an alternative trade program.

The National Congress for Community Economic Development (NCCED) is doing a great job (Elliott Wright, Washington,D.C., T:1.202.289.9020/1.212.870.3921). Need to have both service and justice work. A key program for them is called 'Micah 6'. Helping congregations to do compassion and spirituality plus transformation of society as an integrated whole. In our philanthropy program, we try to figure out our special niche which has turned out to be funding public policy groups spread throughout the States. We are trying to keep the agenda of civil society on the agenda of the church. The church is still a powerful force as we move into the millennium as society hungers to integrates its lives. In the future the ecological limits and nature of our lives will be very important in this process.

WASHINGTON, D.C.

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Association of social innovators that is a mechanism of collaboration for social geniuses. Have clusters around environment and education which have 5-10 year design for their global network. Now have a "citizen's based initiative." With international money dwindling have to help leverage local money. Have fund raising game/contest-innovative ways to raise money at the local level. Mackenzie in Brazil is spearheading with a book of 150 ways to raise money – case studies of raising local funds.

Mr. Kumi Naidoo

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Three values from last few years of focusing on the infra-structure or basic architecture of civil society:

- 1) legislative/fiscal enabling environment of NGOs.
- 2) resource mobilization,
- 3) promoting corporate philanthropy.

Now need value based on- what program will unite our membership? What program will fall on fertile ground of membership? What programs are building resources on what members doing? What will deepen/broaden ownership of Civicus by its members?

Major thrust in first three decades of new Millennium on:

- 1) poverty,
- 2) leadership of women, and
- 3) youth.

We are not value neutral.

Mr.Daniel Q. Kelley

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Philanthropy: how to ask with potential donors, how get sophisticated in asking. Expect hand outs, culture of dependencies. Have clients who pay money or not appreciate what doing but first are you raising money intelligently in your own country? Help set up local fund raising in your own country. Have award ceremonies with prizes for local fund raising.

Trying to do two things:

1) intellectual-how to raise money locally and

2) professionalize fund raising – strengthen boards, marketing strategies and how organize the whole thing.

Truth is if don't raise money locally it is because you didn't ask. Need professional fundraisers with annual campaigns and focused giving campaigns. Have to roll up your sleeves and get to work -- simple, the more people who are asking the more you get. Boards are key. Teamwork and asking are vital issues. The other issue is that the image of civil society is very weak. Need network of associations who are serious and who you can trust. How do promote civil society and the job they are doing. How can they help – give talk and might show case their work by having an organization talk about what they have done.

Ms Laurie Regelbrugge

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Key is to do corporate philanthropy in conjunction with and not devoid of corporate realities – have to fit. Have new president but will continue to give focus to corporate citizenship with learning labs to better understand what is happening although have only been at this work a short time.

Mr. Steven D. Pierce

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Goal to overcome poverty through self-help, local bottom-up development. Key is cooperation among sectors and partnership. Anatomy of partnership at each different stage changing. 1969 started as alternative approach to bi-lateral and multi-lateral systems to fund civil society organizations directly. Have increasingly moved toward participatory development or citizen involvement and corporate citizenship.

Mr. Jeffrey D. Kwaterski

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Strategic communication service. How strategically use communication to help their mission by shaping meaning and knowledge. A network of sharing, a collaborative relationship so can pick up best practices with each other, trouble shoot and just communicate. Need learning communities through better communications that enable best practices to be shared-how get much richer. Forming communities of best practices around which have dialogue-body of dialogue. Need pre and post-champions. Really going to work on continuity on the web site, email discussions and live conferencing or even putting papers up on the email or putting thing up on the web site. How use pre-conference to push out the discussions on the topics, pre-conference dialogues. Do pilot for 3 of the streams. Interactive communication system for the conference.

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PHILANTHROPY FOR SOCIAL INNOVATION PARTICIPATING ORGANIZATIONS

- Asia Pacific Affairs Forum
- Bernard van Leer Foundation
 - CARE
 - Catholic Charities
 - Civicus
- College Assurance Plan Philippines
 - Colorado Trust
 - Daniels Fund
 - Denver Foundation
- Dr.Reddy's Foundation for Human and Social Development (India)
 - Eskom Development Foundation, South Africa
 - Ford Foundation, Andean Region & the Southern Cone
 - Ford Foundation, Middle East and North Africa
 - Ford Foundation, Russia and Eastern Europe
 - Gill Foundation
 - Habitat for Humanity
 - William Randolph Hearst Foundatio
 - Inter-American Foundation
 - The Jacobs Family Foundation
 - W. K. Kellogg Foundation
 - National Committee for Responsive Philanthropy
 - NGO Futures
 - Philippine Business for Social Progress (PBSP)
 - Rotary International
 - Scottish Catholic International Aid (SCIAF)
 - Tanzania Cultural Trust Foundation
 - United Nations Development Program (UNDP)
 - Venture for Fund Raising
 - The World Bank

Philianthropy for Social Change

Washington, D. C.:

Inter-American Fdt., Asoka, PACT, Global Work-Ethic Fund, Civicus, The World Bank and The Hitachi Fdt.

New York:

The Synergos Institute, Trickle-up Program, The Japan Fdt., Mary Coggersall

Minneapolis:

Lyndale Neighborhood Association, Rainbow Research, The National Center for Social Entrepreneurs

Chicago:

Lloyd A. Fry Fdt., The John D.and Catherine T. MacArthur Fdt., Robert R. McCormick Tribune Fdt., The Chicago Community Fdt., Imagine Chicago, The Alford Group Inc., Heartland Alliance, Donors Forum of Chicago, The Seabury Fdt.

Denver:

Anschutz Family Fdt., The Francis J. Cole Fdt., The Enterprise Fdt., The Piton Fdt., Catholic Charities, The International Development Enterprise, The Colorado Trust, Gates Family Fdt., Rose Community Fdt.

San Francisco:

Marin Agricultural Land Trust, The Volunteer Center of San Francisco, Investment Achitects, CARE, Institute for Non-Profit Organizational Management, William Randolph Hearst Fdt., San Jose Unified Fdt., New Healthcare Fdt.

San Diego:

Jacobs Family Fdt., Hamilton and Associates

South:

Colquitt/Miller Arts Council, Dr. Goran Hyden, Presbyterian Hunger Fund, FedEx, Habitat for Humanity