

## 2009 SESSION REPORT

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### Innovation and peer learning: How foundations can learn from each other

*Moderator:* Padraic Brick, New Philanthropy Capital

*Speakers:* Karisia Gichuke, The Diana, Princess of Wales Memorial Fund; Karen Weisblatt, Weisblatt & Associés, Strategic Philanthropy Advising

*Session proposed by:* EFC Diversity, Migration and Integration Interest Group

Padraic Brick of New Philanthropy Capital introduced the session by way of citing the key importance of knowledge in the day-to-day operations of foundations. Although there is an identified need and opportunity to share knowledge, for example when working on the same or related issues or between foundations at different points of the learning cycle, there is a general feeling that the potential for knowledge sharing is far greater than what takes place in practice, in part due to the isolated nature in which foundations conduct their activities.

Why should this matter? Better sharing of learning and experience could lead to better, more coordinated funding, avoid repeating past mistakes and duplication and other such benefits.

Karisia Gichuke from The Diana, Princes of Wales Memorial Fund shared her experience as a newcomer to the philanthropic sector and the opportunities and challenges she met as she tried to learn about the field.

Among the opportunities encountered were:

- Some limited, readily-available publications on philanthropy and the craft of grantmaking (for example GrantCraft)
- Trainings offered by national associations of foundations for newcomers or on specific themes
- Thematic networks of founders which offered the opportunity to get input and critique on ideas and develop joint projects
- Willingness of her foundation to invest in the training and capacity building of their staff

Among the challenges encountered were:

- Lack of transparency and easily-navigable websites of foundations
- A shortage of publications on the craft of grantmaking
- A lack of recorded institutional memory in the foundation/sector
- A reticence of individuals working in foundations to share experience and practice – knowledge is power
- Isolation of working in a foundation coupled with a tendency to work in silos
- Timing of trainings may not coincide with time of need

The sector has greatly benefited from the experience of individuals who come into it from other fields, bringing fresh views and expertise from these sectors. However, given that the majority of these individuals have not been formally trained in philanthropy, it would be worthwhile investing in their preparation on the day-to-day tasks of grantmaking, particularly when this experience is new to many. Suggestions were made from the audience on how workshops and intense training courses offered by universities and research institutes could cater to these needs.

Focusing on the theme of thematic peer learning, Karen Weisblatt of Weisblatt & Associés, Strategic Philanthropy Advising spoke about her experience with the Championing Diversity initiative of the EFC Diversity, Migration and Integration Interest Group (DMIIG).

As an interest group of the EFC focusing on issues of diversity, migration and integration, the DMIIG decided to undertake an initiative to encourage diversity in the foundation sector. The first phase of the project included off-the-record conversations and interviews with a number of leaders in the sector which stemmed into a full-fledged initiative on how foundations were grappling with the issue of diversity both as organisations and grantmakers.

The result was a publication entitled “Championing Diversity: Opportunities for the European Foundation Sector” which outlined five case studies framed against the general background and context in which foundations operate. The approach chosen – to feature challenges as well as successes and share genuine, in-process learning – was sought to appeal to more foundations who could see themselves represented in the case studies presented. Options were also offered for foundations looking to approach this issue and begin conversations about the contentious and difficult issue of diversity. Ms. Weisblatt expressed optimism of the fact that foundations had been willing to share failures as well as successes and the approaches that had proven useful in overcoming these.

Mr. Brick also shared New Philanthropy Capital’s (NPC) experience in the production of reports, presentations and informal networks to share knowledge.

The audience provided useful input on ways that knowledge can be created and shared, including:

- Through Interest Groups (national associations of grantmakers and EFC)
- Through Academic institutions (post-graduate courses on philanthropy, trainings)
- Through shared learning with grantees and other stakeholders
- Through doing

In order for foundations to take advantage of the knowledge produced and benefit from the wealth of knowledge created in the sector, foundations, including senior staff and Trustees, would need to come to the realisation that it is important to invest in the capacity of staff and in sharing learnings – an aspect that is often an after thought for foundations.

Bettina Windau of Bertelsmann Stiftung and Chair of the EFC Capacity Building Committee highlighted the important role conveyed to capacity building by the EFC through its track record on events and training activities as well as a recent study undergone to define a concrete strategy to better serve EFC members in the sharing of learning and capacity building. Through its training activities, International Fellowship Programme, Interest Groups, Annual conference and other initiatives currently under development, the EFC would continue to try to reap the potential of the wealth of knowledge and experience generated by the sector.