



Selected bibliography: Self-Regulation and Good Practices

Last update: June 2007

TABLE OF CONTENT

Under each chapter, bibliographical references are classified by **date of publication**.

PART I : CODES & STATEMENTS	2
1 Foundations / Independent Funders	2
1.1. Europe	2
1.2. Other world regions.....	8
2. Wider Third Sector	13
2.1. Europe	13
2.2. Other world regions.....	16
PART II : ABOUT SELF-REGULATION & GOOD PRACTICES	19
1. General.....	19
2. Self-regulation	20
3. Management General	22
3.1 Governance	24
3.2 Staff / Volunteers management.....	26
3.3 Equality & Fairness (Equal opportunities).....	27
3.4 Grant-making (from assessing applications to funding)	27
3.5 Finance / Investment.....	27
3.6 Communication / Knowledge management	30
3.7 Evaluation	30
4. Disclosure & public accountability.....	33
4.1 Communication to the public / media	33
4.2 Reporting	34

Part I: Codes & Statements

1 Foundations / Independent Funders

1.1. Europe

EFC Principles of Good Practice. - Brussels :

European Foundation Centre, 2007. - 12 p.

The EFC Principles encompass a set of seven Principles of Good Practice based on an identified set of core values that every foundation in Europe should aspire to embrace. They are designed to apply across a variety of cultures and jurisdictions and to an even larger variety of foundations. They are intended to be of application both within the EU and in the context of the wider Europe. 12 pages. 2007

<http://www.efc.be/ftp/public/EFCpublications/EFCPrinciplesGoodPractice.pdf>

For information:

<http://www.efc.be/codex/default.htm>

Publisher's contact details:

Brussels : European Foundation Centre

Website : <http://www.efc.be>

E-mail : efc@efc.be

Implementing EFC (European Foundation Centre) Principles of Good Practice : illustrative practice options for foundations. - Brussels : European Foundation Centre, 2007. - 16 p.

The Illustrative Practice Options for Foundations recognise the diversity of legal requirements and operating practices across Europe. They aim to enable foundations to adopt and adapt those that will assist them in facilitating

their implementation of the European Foundation Centre Principles within the context of their own environments and organisational circumstances.

http://www.efc.be/ftp/public/EFCpublications/EFCPrinciples_Illustrative_Options.pdf

For information:

<http://www.efc.be/codex/default.htm>

Publisher's contact details:

Brussels : European Foundation Centre

Website : <http://www.efc.be>

E-mail : efc@efc.be

Quality accreditation guidance pack: the standards and corporate assessment. – London : Community Foundation Network, 2006. - 1 p.

This document is a part of the 'Quality Accreditation standards for UK community foundations' published by the Community Foundation Network in partnership with the Charity Commission. The accreditation process involves rigorous independent inspection of community foundations against twenty core standards which have been endorsed by the Charity Commission.

http://www.communityfoundations.org.uk/media_centre/news_files/34.doc

For information:

<http://www.communityfoundations.org.uk>

Publisher's contact details:

London : Community Foundation Network

Website :

<http://www.communityfoundations.org.uk/index.php>

E-mail :

network@communityfoundations.org.uk

Grundsätze Guter Stiftungspraxis. - Berlin : Bundesverband Deutscher Stiftungen e. V., 2006. - 3 p.

The members of the Bundesverband Deutscher Stiftungen e.V./Association

of German foundations approved the principles of good foundation practice at their May 11th 2006 Annual General Assembly. The document is composed of a short introduction and two main parts. Part one clarifies that the principles are aimed at public benefit foundations. The second part contains the principles of good foundation practice, which are divided into two subsections: Section one deals with responsibilities of the people who act for the foundation and section two addresses potential conflicts of interest.

http://www.stiftungen.org/files/original/galerie_vom_09.12.2005_11.26.20/Grundsatz-Stiftungspraxis.pdf

Publisher's contact details:

Berlin : Bundesverband Deutscher Stiftungen e. V.

Website: <http://www.Stiftungen.org>

E-mail: Post@Stiftungen.org

Het besturen van een fonds : een handreiking. - Den Haag : Vereniging van Fondsen in Nederland (FIN), 2005. - 36 p.

This document was published as a support for those who are involved in the working of a governing board. Divided into modules, it defines the activities for which governing boards are in charge, as well as the different phases of development with which boards can be faced. It also develops the competences of profession strengths which are related to governance, for example, the daily management with commissions. Questions at the end of each module intend to help readers to deepen their own reflection.

<http://www.verenigingvanfondsen.nl/pagina's/archief/archief.htm>

For information:

<http://www.verenigingvanfondsen.nl/pagina's/archief/archief.htm>

[a's/archief/artikelen/PB%202005%20handreiking%20besturen.htm](http://www.verenigingvanfondsen.nl/pagina's/archief/archief.htm)

Publisher's contact details:

Den Haag : Vereniging van Fondsen in Nederland (FIN)

Website:

<http://www.verenigingvanfondsen.nl/english/index.htm>

E-mail: info@verenigingvanfondsen.nl

Swiss foundation code : recommendations for the establishment and management of grant-making foundations / Karl Hofstetter, Thomas Sprecher. - Zurich : Swiss Foundations, 2005. - 131 p.

The Swiss Foundation Code is based on three central principles that are explained in detail by means of 22 descriptions and recommendations regarding foundation management, furtherance, and finances. The code has a specific Swiss background and is based on a liberal understanding of foundation governance.

For information:

<http://www.swissfoundations.ch/en/portrait/swiss-foundation-code.html>

Publisher's contact details:

Zurich : Swiss Foundations

Website: <http://www.swissfoundations.ch>

E-mail: info@swissfoundations.ch

Code of conduct. - Warsaw : Trust for Civil Society in Central and Eastern Europe, 2004. - 4 p.

The Trust for Civil Society in Central and Eastern Europe wrote and approved this code of conduct in order to state their values clearly and to use those values as a guide in working with others to build civil society in Central and Eastern Europe. It includes provisions on accountability, transparency, use of resources,

responsible grantmaking and good leadership and management practice.

<http://www.ceetrust.org/files/TrustCodeofConduct.pdf>

For information:

<http://www.ceetrust.org/index.php?ar=11>

Publisher's contact details:

Warsaw : Trust for Civil Society in Central and Eastern Europe

Website: <http://www.ceetrust.org>

E-mail: ceetrust@ceetrust.org

Conflict of interest policy. - Warsaw : Trust for Civil Society in Central and Eastern Europe, [2004?]. - 3 p.

This conflict of interest policy is intended to protect the integrity and reputation of the Trust for Civil Society in Central and Eastern Europe. To achieve this, the publication describes exact standards for transparency that allow all persons affiliated with the Trust to promote the Trust's interests and affairs. A contract which must be signed annually by each trustee is included.

<http://www.ceetrust.org/files/TrustConflictofInterestPolicy.pdf>

For information:

<http://www.ceetrust.org/index.php?ar=11>

Publisher's contact details:

Warsaw : Trust for Civil Society in Central and Eastern Europe

Website: <http://www.ceetrust.org>

E-mail: ceetrust@ceetrust.org

Code of conduct for members of the Association of Foundations in the Netherlands, FIN. - Den Haag : Vereniging van Fondsen in Nederland (FIN), 2004. - 7 p.

The code of conduct for the members of the FIN (Association of Foundations in the Netherlands) provided in this publication is composed of two

elements: the Guiding Principles and Membership Criteria, accompanied by a number of Recommendations. The code of conduct establishes basic values and principles to guide the actions and practices of FIN members.

<http://www.verenigingvanfondsen.nl/pagina's/archief/artikelen/art2004gedragscode.htm>

For information:

<http://www.verenigingvanfondsen.nl>

Publisher's contact details:

Den Haag : Vereniging van Fondsen in Nederland (FIN)

Website: <http://www.verenigingvanfondsen.nl>

E-mail: info@verenigingvanfondsen.nl

Code of ethics for foundations. - Prague : Czech Donors Forum, 2004. - 4 p.

This code of ethics outlines the ethical principles and values recognised by the Czech Donors Forum and by the members of it (specifically foundations with endowment). The aim of this code is to improve the quality and culture of philanthropy and grantgiving in the Czech Republic, and to provide standards by which the operations and decision making processes of foundations can be judged.

For information:

<http://www.donorsforum.cz/index.php?id=74&kat=2&lang=>

Publisher's contact details:

Prague : Czech Donors Forum

Website: <http://www.donorsforum.cz>

E-mail: donorsforum@donorsforum.cz

Code of ethics for foundations without endowment. - Prague : Czech Donors Forum, 2004. - 2 p.

This code of ethics outlines the ethical principles and values recognised by

the Czech Donors Forum and by the members of it (specifically foundations without endowment). The aim of this code is to improve the quality and culture of philanthropy and grantgiving in the Czech Republic and to provide standards by which the operations and decision making processes of foundations can be judged.

For information:

http://www.donorsforum.cz/download/kode_x_nadacni_fondy.doc

Publisher's contact details:

Prague : Czech Donors Forum

Website: <http://www.donorsforum.cz>

E-mail: donorsforum@donorsforum.cz

Déclaration de base du Réseau de Fondations Belges. - Brussels : Réseau de Fondations Belges, 2003. - 4 p.

This statement of principles and practices was written by the Network of Belgian Foundations. The principles that it outlines serve to guide organisations that wish to increase their transparency and accountability in the foundation sector of Belgium. All members of the Belgian Network of Foundations must adhere to the principles of the statement.

<http://www.reseaufondations.be/fr/declaration.htm>

For information: http://www.kbs-frb.be/code/page.cfm?id_page=125&ID=644

Publisher's contact details:

Brussels : Réseau de Fondations Belges

Website: <http://www.reseaufondations.be>

E-mail: vanlindt.a@kbs-frb.be

Basisverklaring van het Netwerk Belgische Stichtingen - Brussels : Netwerk Belgische Stichtingen, 2003. - 4 p.

This statement of principles and practices was written by the Network of Belgian Foundations. The principles that it outlines will guide organisations that wish to increase the transparency and accountability for the foundation sector in Belgium. All members of the Belgian Network of Foundations must adhere to the principles of the statement.

<http://www.reseaufondations.be/nl/declaration.htm>

For information: http://www.kbs-frb.be/code/page.cfm?id_page=125&ID=644

Publisher's contact details:

Brussels : Netwerk Belgische Stichtingen

Website: <http://www.reseaufondations.be>

E-mail: vanlindt.a@kbs-frb.be

A quality framework. - London : Association of Charitable Foundations (ACF), 2002. - 63 p.

The Association of Charitable Foundations (ACF) has produced this framework for trusts so that funders can improve the quality of their grantmaking. It includes three levels of assessment for foundations and sections on managing governance, strategy, communications, personnel, finance, and evaluation.

For information:

http://www.acf.org.uk/public_text/publications_text/goodprac.htm

Publisher's contact details:

London : Association of Charitable Foundations (ACF)

Website: <http://www.acf.org.uk>

E-mail: acf@acf.org.uk

Standards for community foundations in Slovakia. - Bratislava : Association of Community

Foundations of Slovakia, [2002?]. - 3 p.

Standards developed by the Association of Community Foundations of Slovakia. This document defines what a Slovak Community foundation is and describes further characteristics to complete the definition of a community foundation, including mission, structure, governance, stewardship and accountability among others.

<http://akn.ddt.sk/en/charakteristika/standardy>

Publisher's contact details:

Bratislava : Association of Community Foundations of Slovakia

Website: <http://akn.ddt.sk>

E-mail: knb@knb.sk

Best practice in foundation management: grant giving foundations. - Helsinki : Council of Finnish Foundations, 2001. - 4 p.

This statement was written by the Council of Finnish Foundations to describe its mission and to outline the codes of practice that it recommends for the foundations which make up its membership. The instructions for best practice that it outlines are meant to be followed by members if they are in harmony with the bylaws of the individual foundation.

For information:

<http://www.skr.fi/spalvelu/council>

Publisher's contact details:

Helsinki : Council of Finnish Foundations

Website: <http://www.skr.fi/spalvelu/council>

E-mail: rs@skr.fi

Donor's code of ethics. - Bratislava : Slovak Donors Forum, 2000. - 3 p.

This code of ethics outlines the ethical principles and values recognised by the Slovak Donors Forum and by the members of it. The aim of this code is to improve the quality and culture of philanthropy and grantgiving in Slovakia and to provide standards by which the operations and decision making processes of foundations can be fairly judged.

For information:

http://www.donorsforum.sk/EN_aboutus_code.html

Publisher's contact details:

Bratislava : Slovak Donors Forum

Website: <http://www.donorsforum.sk>

E-mail: donorsforum@donorsforum.sk

Standards of operations of a Polish local philanthropic organisations. -

Warsaw : The Academy for the Development of Philanthropy in Poland, 2000. - 2 p.

Document drafted by representatives of 12 organisations, members of LPO Network and the Academy for the Development of Philanthropy in 2000. It presents a definition of what a local philanthropic organisation is as well as a description of standards recommended to local philanthropic organisations in order to achieve an effective management.

Publisher's contact details:

Warsaw : The Academy for the Development of Philanthropy in Poland

Website:

http://www.filantropia.org.pl/english/e_menu.html

E-mail: arfp@filantropia.org.pl

Code of ethics for the Russia Donors Forum. - Moscow : Russia Donors Forum (RDF), [200?]. - 1 p.

This document summarises the ethical principles governing the activities of Members of the Russia Donors'

Forum. Some of these principles are covered by existing legislation, while others go beyond existing legal framework. The document also sets out basic standards for behaviour and relations with the public.

For information:

<http://www.donorsforum.ru>

Publisher's contact details:

Moscow : Russia Donors Forum (RDF)

Website: <http://www.donorsforum.ru>

Guidelines for funders of voluntary organisations. - London : Association of Charitable Foundations (ACF), 1997. - 5 p.

This set of guidelines was written by the United Kingdom-based Association of Charitable Foundations in collaboration with some of the United Kingdom's largest non-government organisations. The guidelines contain general principles for what constitutes good practice in grantmaking and describes the different ways that projects and organisations can be funded.

<http://www.acf.org.uk/pubs/guidelines.PDF>

For information:

http://www.acf.org.uk/public_text/trusts_guidelines.htm

Publisher's contact details:

London : Association of Charitable Foundations (ACF)

Website:

<http://www.acf.org.uk/publications/order.htm>

E-mail: ahubrath@acf.org.uk

1.2. Other world regions

Stewardship principles for independent foundations : draft : August 2, 2005. - Washington, DC : Council on Foundations, 2005. - 6 p.

Through their philanthropy, foundations aspire to achieve a lasting and positive impact on society. This document describes how independent foundations can reflect fundamental values like honesty, integrity, openness and fairness in their board governance, management, grantmaking and charitable activities.

http://www.cof.org/files/Documents/Stewardship%20Principles%20%20Best%20Practices%20Initiative/Independent/Independent_Principles_-_August_2_Draft.PDF

For information:

<http://www.cof.org/learn/content.cfm?itemnumber=555&navItemNumber=1980>

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Statement of ethical principles. - Washington, DC : Council on Foundations, 2005. - 1 p.

This statement, approved on June 28, 2005, outlines the ethical principles to be followed by the Council on Foundations and its members, regarding foundations' mission, stewardship, accountability and transparency, diversity and inclusiveness, governance and respect.

<http://www.cof.org/Council/content.cfm?itemNumber=1643&navItemNumber=1964>

For information:

<http://www.cof.org/learn/content.cfm?itemnumber=555&navItemNumber=1980>

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Stewardship principles for family foundations. - Washington, DC : Council on Foundations, 2004. - 5 p.

These principles, developed by the Council on Foundations, are guiding ideals that describe how family foundations can reflect in their governance, management and grantmaking, fundamental values, including honesty, integrity, fairness and respect. Each principle has practice options, which are specific courses of action by which a foundation may improve performance related to the principle.

<http://www.cof.org/files/Documents/FamilyFoundations/ACFF0CE.pdf>

For information:

<http://bestpractices.cof.org/family/>

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

National standards for US community foundations. - Washington, DC : Council on Foundations, 2004. - 7 p.

The National Standards were developed by a group of community foundation practitioners after months of research and consultation and were approved by the Community Foundations Leadership Team in late 2000. Since then, both established and new community foundations across United States, have pledged to adopt and implement these national standards which give a definition of what a US community foundation is and outline its main characteristics.

http://www.cof.org/files/Documents/Community_Foundations/nationalstandards.pdf

For information:

<http://bestpractices.cof.org/community/>

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Stewardship principles for corporate grantmakers. -

Washington, DC : Council on Foundations, 2004. - 7 p.

In September 2004, the Committee on Corporate Grantmaking formally adopted the Stewardship Principles for Corporate Grantmakers. Grantmakers from across the country participated in crafting this document, which states a commitment to excellence and accountability. It describes how corporate grantmakers can reflect in their governance, management and grantmaking fundamental values, including honesty, integrity, fairness and respect.

http://www.cof.org/files/Documents/Corporate_Grantmaking/Corporate%20Principles/Principles_Booklet_Corporate_FINAL.pdf

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Statement of values and code of ethics for nonprofit and philanthropic organizations. -

Washington, DC : Independent Sector, 2004. - 7 p.

This code of ethics was written by the United States-based Independent Sector and describes the ethical standard that this organisation has adopted in order to create a national forum capable of encouraging the

giving, volunteering and not-for-profit initiative.

<http://www.independentsector.org/issues/accountability.html>

Publisher's contact details:

Washington, DC : Independent Sector

Website:

http://www.independentsector.org/pubs_cart.htm

E-mail: info@IndependentSector.org

Statement of values and ethical principles. - Montréal : Philanthropic Foundations Canada, 2004. - 2 p.

Statement of values and ethical principles approved by the board of directors of "Philanthropic Foundations Canada" on December 6, 2004 and subscribed annually by its members. It serves as a frame of reference to support and guide the work of the foundations by common values and ethical principles

http://www.pfc.ca/cms_en/page1104.cfm

Publisher's contact details:

Montréal : Philanthropic Foundations Canada

Website: <http://www.pfc.ca/>

E-mail: general@pfc.ca

Standards for charity

accountability. - Arlington, VA : BBB Wise Giving Alliance, 2003. - 3 p.

This set of ethics was originally written by the United States-based National Charities Information Bureau (NCIB) and was updated and reissued by the combined Better Business Bureau and NCIB. It describes methods by which philanthropic organisations can adhere to high standards of transparency and accountability. The standards address best practice in governance, as well as in the use and distribution of funds and fiscal reporting.

<http://www.give.org/standards/spring03standards.PDF>

For information:

<http://www.give.org/standards/index.asp>

Publisher's contact details:

Arlington, VA : BBB Wise Giving Alliance

Website: <http://www.give.org>

Council on Michigan Foundations guiding principles : suggested implementation approaches. - Grand Haven : Council on Michigan Foundations (CMF), 2003. - 8 p.

The Council of Michigan Foundations (CMF) board of trustees adopted seven Guiding Principles as a condition of membership, effective April 1, 2004. These Guiding Principles specify best practice for the goals, decision making and operations of the member organisations. The board of directors which authored the principles recognised that there are different ways to implement each principle.

http://www.cmif.org/Documents/Guiding_Principles_4-1-04.pdf

For information:

http://www.cmif.org/About_Principles.htm

Publisher's contact details:

Grand Haven : Council on Michigan Foundations (CMF)

Website:

http://www.cmif.org/About_Principles.htm

E-mail: info@CMIF.org

Recommended principles and practices for effective grantmaking.

- Washington, DC : Council on Foundations, 2002. - 2 p.

This statement of principles and practices was written by the United States based Council on Foundations. The statement outlines measures that foundations may take to improve

transparency and accountability in finance, governance and grantmaking. All members of the Council on Foundations must adhere to the principles of the statement.

<http://www.cof.org/Council/content.cfm?ItemNumber=860>

For information:

<http://www.cof.org/index.cfm?containerID=68&menuContainerID=0&crumb=2&navID=0>

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Code of practice. - Melbourne Victoria : Philanthropy Australia, 2002. - 3 p.

This voluntary Code of Practice constitutes a recommendation for full Grantmaking Philanthropy Australia members. Its aim is to encourage best practice, openness and transparency in all aspects of grantmaking by these member organisations, whether they are family foundations, corporate foundations or corporate giving programmes, community foundations, private foundations or government-initiated foundations.

<http://www.philanthropy.org.au/membership/cop.htm>

Publisher's contact details:

Melbourne Victoria : Philanthropy Australia

Website: <http://www.philanthropy.org.au>

E-mail: pa@philanthropy.org.au

Conflicts of interest : safeguarding your foundation. - Washington, DC : Council on Foundations, 2002. - 2 p.

This statement of principles and practices outlines measures that foundations may take to improve

transparency and accountability in finance, governance and grantmaking. Aimed at the members of the Council on Foundations, it is designed to encourage greater compliance and adherence to legal and expected standards of accountability. Resources include articles by the Council on Foundations and sample conflict of interest policies for community foundations, private foundations and corporate giving programs.

[http://www.cof.org/files/Documents/Building%20Strong%20Ethical%20Foundations/Conflicts of Interest Safeguarding Your Foundation.pdf](http://www.cof.org/files/Documents/Building%20Strong%20Ethical%20Foundations/Conflicts%20of%20Interest%20Safeguarding%20Your%20Foundation.pdf)

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Community Foundations of Canada. Explorations : principles for community foundations. - Ottawa : Community Foundations of Canada, 2001. - 32 p.

This document outlines ten principles to guide the work of community foundations. Along with many familiar practices, it describes ideas that aim to encourage community foundations across Canada to explore the roles they can play in facilitating philanthropy, engaging their communities and building community capacity.

http://www.community-fdn.ca/doc/explorations_eng.pdf

Publisher's contact details:

Ottawa : Community Foundations of Canada

Website: <http://www.community-fdn.ca>

E-mail: info@community-fdn.ca

Illustrative statement of practices to implement the principles for

grantmakers for private foundations. - Minneapolis : Minnesota Council on Foundations, [1996?]. - 8 p.

Statement of Practices prepared by the Minnesota Council on Foundations as an illustration of the specific practices private foundations might adopt in order to implement the eight principles for Minnesota grantmakers. The principles, to which all members of the Council are being asked to subscribe, are broad statements of responsibilities implied by both the public trust vested in grantmakers and the ethical standards to which the Council is committed.

<http://www.mcf.org/mcf/about/private.pdf>

For information:

<http://www.mcf.org/mcf/about/principle.htm>

Publisher's contact details:

Minneapolis : Minnesota Council on Foundations

Website: <http://www.mcf.org>

E-mail: info@mcf.org

Illustrative statement of practices to implement the principles for grantmakers for family foundations. - Minneapolis : Minnesota Council on Foundations, [1996?]. - 7 p.

Statement of practices, designed to be a model of excellence for grantmakers, has been prepared by the Minnesota Council on Foundations to illustrate specific practices that small family foundations might adopt in order to implement the eight Principles for Minnesota Grantmakers to which all members of the Council are being asked to subscribe. The Principles are broad statements of responsibilities implied by both the public trust vested in grantmakers and the ethical standards to which the Council is committed.

<http://www.mcf.org/mcf/about/family.pdf>

For information:

<http://www.mcf.org/mcf/about/principle.htm>

Publisher's contact details:

Minneapolis : Minnesota Council on Foundations

Website: <http://www.mcf.org>

E-mail: info@mcf.org

Illustrative statement of practices to implement the principles for grantmakers for corporate foundations and corporate giving programs. - Minneapolis : Minnesota Council on Foundations, [1996?]. - 7 p.

The following Statement of Practices has been prepared by the Minnesota Council on Foundations as an illustration of the specific practices corporate foundations and corporate giving programmes might adopt in order to implement the eight principles for Minnesota grantmakers. The principles, to which all members of the Council are being asked to subscribe, are broad statements of responsibilities implied by both the public trust vested in grantmakers and the ethical standards to which the Council is committed.

<http://www.mcf.org/mcf/about/corporate.pdf>

For information:

<http://www.mcf.org/mcf/about/principle.htm>

Publisher's contact details:

Minneapolis : Minnesota Council on Foundations

Website: <http://www.mcf.org>

E-mail: info@mcf.org

Illustrative statement of practices to implement the principles for grantmakers for community and public foundations. - Minneapolis : Minnesota Council on Foundations, [1996?]. - 8 p.

Statement of practices prepared by the Minnesota Council on Foundations as an illustration of the specific practices community and public foundations might adopt in order to implement the eight principles for Minnesota Grantmakers. The Principles, to which all members of the Council are being asked to subscribe, are broad statements of responsibilities implied by both the public trust vested in grantmakers and the ethical standards to which the Council is committed.

<http://www.mcf.org/mcf/about/community.pdf>

For information:

<http://www.mcf.org/mcf/about/principle.htm>

Publisher's contact details:

Minneapolis : Minnesota Council on Foundations

Website: <http://www.mcf.org>

E-mail: info@mcf.org

2. Wider Third Sector

2.1. Europe

Good governance : a code for the voluntary and community sector. -

London : The National Hub of Expertise on Governance, 2005. - 42 p.

This code is primarily aimed at the trustees of voluntary and community organisations, who have governance responsibilities. Reviewing key principles of good governance, it aims to help improve the effectiveness of voluntary and community organisations by clarifying how governing bodies can work effectively, by reassuring stakeholders about the way organisations are governed, and maintaining and enhancing public confidence in organisations and in the sector. Includes a list of organisations that can assist trustees or offer quality assurance systems and/or accreditation for the voluntary and community sector.

<http://www.governancehub.org.uk/GovHub/Content/Documents/Gd-Gov-FINAL.pdf>

For information:

http://www.governancehub.org.uk/?Getting_help_with_governance:A_Code_of_Governance_for_the_Voluntary_and_Community_Sector

Publisher's contact details:

London : The National Hub of Expertise on Governance

Website: <http://www.governancehub.org.uk>

E-mail: governancehub@ncvo-vol.org.uk

Carta della donazione. - Milano : Istituto Italiano della Donazione (IID), 2005. - 16 p.

The Italian Institute of Donations was established in 2004 as an Italian non-profit organisation. A member of The International Committee on

Fundraising organisations (ICFO), its purposes are to promote and foster excellence, transparency, integrity, fair management practices and ethical conduct in non-profit organisations as well as to verify and monitor whether certain organisations who apply for an accreditation by IID respect these values. The accreditation process is based on the 'Carta della Donazione' as a code of conduct for fundraising in the Italian non-profit sector.

http://www.istitutoitalianodonazione.it/custom/iid/documenti/carta_donazione.pdf

For information:

<http://www.istitutoitalianodonazione.it/menue.asp?r=564&a=4481>

Publisher's contact details:

Milano : Istituto Italiano della Donazione (IID)

Website: <http://www.istitutoitalianodonazione.it>

E-mail:

sara.castagnini@istitutoitalianodonazione.it

System der standards für non profit organisationen in den bereichen spendenmittelaufbringung und spendenmittelverwaltung. - Vienna :

Österreichische Forschungsstiftung für Entwicklungshilfe (ÖFSE), 2005. - 11 p.

This document describes a set of standards of transparency and accountability for non-profit organisations that engage in fundraising or grant administration. The publication also includes document templates for certifying compliance with standards.

http://www.osgs.at/downloadtexte/Koopvertrag05_o_Beilagen.pdf

Publisher's contact details:

Vienna : Österreichische Forschungsstiftung für Entwicklungshilfe (ÖFSE)

Website: <http://www.oefse.at>

E-mail: office@oefse.at

DZI Seal-of-Approval : symbol of trust : guidelines and implementing instructions for non-profit organizations soliciting donations supra-regional wide. - Berlin : Deutsches Zentralinstitut für Sociale Fragen (DZI), 2003. - 7 p.

The DZI is an independent government subsidised scientific documentation centre in the field of theory and practice of social work. Among other services to the third sector, they provide fundraising organisations with a 'Seal of Approval' that lets donors know that these organisations meet standards for integrity and effectiveness. This document contains instructions on how to qualify for DZI approval.

Publisher's contact details:

Berlin : Deutsches Zentralinstitut für Sociale Fragen (DZI)

Website: <http://www.dzi.de>

E-mail: sozialinfo@dzi.de

Charte de déontologie des organisations sociales et humanitaires faisant appel à la générosité du public. - Paris : Comité de la Charte de Déontologie (CC), 2001. - 9 p.

This charte [statement of principles] of best practice was written and adopted by a number of large French social and humanitarian organisations concerned about their credibility during the late 1980s. By writing it and agreeing to abide by this document, the organisations present also created the Comité de la Charte de Déontologie, (Ethical charter Committee) to ensure that the stated principles were upheld.

http://www.comitecharte.org/ewb_pages/d/deonthologie_charte.php

Publisher's contact details:

Paris : Comité de la Charte de Déontologie (CC)

Website: <http://www.comitecharte.org>

E-mail: ccharte@comitecharte.org

Reglement en Bijlagen CBF-Keur / Anthony Fokkerweg. - Amsterdam : Central Bureau Fondsenwerving (CBF), [200?]. - 46 p.

Since 1995, the Central Bureau Fondsenwerving (CBF) has awarded 'Quality Standard Labels' to organisations they feel that maintain a high standard of transparency in fundraising activities, an element they consider important for justifying their existence. This document contains the list of standards by which the organisations are evaluated.

http://www.cbf.nl/Downloads/Bestanden/Aanvragen_%20CBF-Keur/Reglement%20CBF-Keur.pdf

For information:

http://www.cbf.nl/CBF_Keurmerk_verklaring/

Publisher's contact details:

Amsterdam : Central Bureau Fondsenwerving (CBF)

Website: <http://www.cbf.nl>

E-mail: mail@cbf.nl

Gemeinnützige Organisationen mit Gütesiegel

<http://www.zewo.ch>

Website published by : Zurich : Zentralinstitut für Wohlfahrtsunternehmen (ZEWO)

Last date modified: unknown

Visited on: 03/08/2006

The Central bureau for charitable activity provides public information on fundraising organisations in Switzerland, including those 296 organisations which have been granted 'quality label' by ZEWO. In addition to its information, monitoring

and accrediting role, ZEWO provides guidance and services on legal issues in fundraising and financial reporting.

Code of ethics. - Sofia : The Union of Bulgarian Foundations and Associations, 1995. - 5 p.

This code of ethics was written by the Union of Bulgarian Foundations and Associations (UBFA) whose mission is to promote cooperation between non-governmental organisations and to stimulate their relations with political and business circles as well as the media. These standards describe methods by which third sector organisations can conduct programmes, management activities and communication to achieve a high degree of transparency and accessibility.

Publisher's contact details:

Sofia : The Union of Bulgarian Foundations and Associations

Website: <http://www.digsys.bg/ngo/>

E-mail: http://wwwubfa@ngo.be

Stiftelsen för Insamlingskontroll

SFI. - Stockholm : Stiftelsen för Insamlingskontroll (SFI), [198?].

On October 22 1980, the General Directives concerning Fundraising Control were adopted by the Board of the Fundraising Control Foundation. The nineteen General Directives outlining the foundation's policies on the inspection of fundraising expenses, the use of sound marketing methods for fundraising, and the development of appropriate methods of fundraising inspection are presented in this publication.

Publisher's contact details:

Stockholm : Stiftelsen för Insamlingskontroll (SFI)

Website: <http://www.insamlingskontroll.a.se>

E-mail: sfi@far.se

2.2. Other world regions

Standards for fundraising organisations. - Berlin : International Committee on Fundraising Organizations (ICFO), [1998]. - 2 p.

This publication presents The International Committee on Fundraising Organisations' (ICFO) set of international standards for good governance and management for international non-governmental organisations. These standards strive to raise public funds for the public benefit most effectively, and cover five areas: membership and governance, fulfilment of goals, fiscal management and reporting, fundraising practice and communication.

<http://www.icfo.de/standards.htm>

For information:

<http://www.avagara.com/nonprof/accountability/reference/99080504.htm>

Publisher's contact details:

Berlin : International Committee on Fundraising Organizations (ICFO)

Website: <http://www.icfo.de>

E-mail: wilke@dzi.de

Monitoring fundraising : a comparative survey of ICFO members and their countries / Ingrid-Hélène Guet. - Berlin : The International Committee on Fundraising Organizations (ICFO), 2002. - 83 p.

This survey provides a detailed overview of the structures and working methods of ICFO member organisations and the most important determinants concerning the fundraising sectors in their respective countries.

<http://www.icfo.de/texte/survey-formatted.pdf>

For information:

<http://www.icfo.de/publications.htm>

Publisher's contact details:

Berlin : The International Committee on Fundraising Organizations (ICFO)

Website: <http://www.icfo.de>

E-mail: wilke@dzi.de

International non governmental organisations : accountability charter. - London : Amnesty International, 2005. - 6 p.

The Accountability Charter sets out core values and operating principles for international NGOs. These include good governance and management, fundraising and multi-stakeholder engagement. It also makes specific reference to respect for universal principles such as the Universal Declaration of Human Rights, for independence, responsible advocacy, effective programmes, non-discrimination, transparency and ethical fundraising.

http://www.amnesty.org/resources/downloads/INGO_Accountability_Charter.pdf

For information:

http://www.news.amnesty.org/index/ENGP_OL306062006

A French version, which has been translated and published by 'Les Editions Francophones d'Amnesty International' <http://www.efai.org> in 2006, is also available under the title 'ONGI. Charte sur l'obligation de rendre des comptes': http://www.oxfam.org/fr/files/INGO_accountability_charter_0606

Publisher's contact details:

London : Amnesty International

Website: <http://www.amnesty.org>

Code of ethics and conduct for NGOs. - Tarrytown : The World

Association of Non-Governmental Organizations (WANGO), 2004. - 42 p.

The Code of Ethics Project was initiated by the World Association of Non-Governmental organisations at the 2002 Annual Conference in Washington, DC, upon recommendations of conference speakers, prominent attendees, and the advocacy of WANGO members. An international committee of NGO leader from 42 nations was established for the development of a set of fundamental and operational principles which can guide the actions and management of NGOs.

<http://www.wango.org/activities/codeofethics/CodeOfEthicsV.5.p.pdf>

For information:

<http://www.wango.org/activities/codeofethics.aspx?page=0>

Publisher's contact details:

Tarrytown : The World Association of Non-Governmental Organizations (WANGO)

Website: <http://www.wango.org>

E-mail: secretariat@wango.org

Seven standards. - Winchester, VA : Evangelical Council for Financial Accountability (ECFA), [2003?]. - 86 p.

The Evangelical Council for Financial Accountability's (ECFA) purpose is to enunciate, maintain and manifest a code of financial accountability, ethics and reporting which is consistent with enlightened and responsible Christian faith and practice. The standards that they outline on these webpages are adopted by their more than 800 charitable, religious and educational member organisations.

<http://www.ecfa.org/ContentEngine.aspx?Page=7Standards>

Publisher's contact details:

Winchester, VA : Evangelical Council for Financial Accountability (ECFA)

Website: <http://www.ecfa.org>

E-mail: info@ecfa.org

The ethical fundraising and financial accountability code. -

Toronto : Imagine Canada, [199-?]. - 7 p.

The Ethical Fundraising and Financial Accountability Code was developed by Imagine Canada, in consultation with charity leaders throughout Canada. Its primary purpose is to assure donors of the integrity and accountability of charities that solicit and receive their financial support.

http://www.imaginecanada.ca/Files/ethical_code/ethical_code.pdf

For information:

http://www.imaginecanada.ca/page.asp?ethical_fundraising

Note: The French version is also available on the following address:

http://www.imaginecanada.ca/FilesFr/ethicalcode/french_ethical_code.pdf

Publisher's contact details:

Toronto : Imagine Canada

Website: <http://www.imaginecanada.ca>

E-mail: code@imaginecanada.ca

Canadian Council of Christian Charities (CCCC) standards of organizational integrity and accountability. - Elmira [ON] :

Canadian Council of Christian Charities (CCCC), [199-?]. - 5 p.

This publication outlines the standards of accountability developed by the Canadian Council of Christian Charities (CCCC) which encourage their members to be more accountable and to subscribe to appropriate methods of evaluation. The standards cover management and financial issues as well as doctrine and legal

issues specific to religious organisations.

<http://www.cccc.org/contents.php?area=y&id=1031>

Publisher's contact details:

Elmira [ON] : Canadian Council of Christian Charities (CCCC)

Website: <http://www.cccc.org>

E-mail: mail@ccc.org

Ethics matter : United Way of America code of ethics guide. - Alexandria, VA : United Way of America, 2004. - 27 p.

This code of ethics was written by the United States-based third sector organisation 'United Way' which is dedicated to mobilising commitment to charitable causes. In this code, The United Way pledges to commit itself to personal integrity, professional excellence, responsibility to and of volunteers accountability and efficiency, vendor relations, equal opportunity, and avoiding conflicts of interest, personal gain, nepotism, and solicitations.

<http://national.unitedway.org/files/pdf/EthicsCode2004.pdf>

For information:

<http://national.unitedway.org/aboutuwa/>

Publisher's contact details:

Alexandria, VA : United Way of America

Website: <http://www.unitedway.org>

InterAction's Private Voluntary Organization (PVO) standards. - Washington, DC : InterAction, 2001. - 25 p.

This set of standards was developed by the United States-based organisation InterAction whose mission is to enhance the effectiveness and professional

capacities of humanitarian third sector organisations. The principles discussed apply to the governance, volunteer involvement, support from the private sector, fundraising, service and programmes of third sector organisation. These are characteristics which allow them to be accurately described as private, voluntary organisations.

<http://www.interaction.org/pvostandards/index.html>

Publisher's contact details:

Washington, DC : InterAction

Website: <http://www.interaction.org>

E-mail: ia@interaction.org

Givewell

<http://www.givewell.com.au>

Website published by : Marouba Beach NSW : Givewell

Last date modified: unknown

Visited on: 27/07/2006

Givewell is the first organisation in Australia to provide a comprehensive research service for informed giving and to thereby promote a better culture of giving in Australia. This organisation provides information on research that it conducted on charities, by gathering information on foundations and community attitudes to giving, and by generating ideas on better ways to give.

Publisher's contact details:

Marouba Beach NSW : Givewell

E-mail: givewell@iprimus.com.au

Part II : About Self-Regulation & Good Practices

1. General

The Council on Foundations : accountability & governance

<http://www.cof.org/learn/content.cfm?ItemNumber=582&navItemNumber=2662>

Website published by : Washington, DC : Council on Foundations

Visited on: 01/08/2006

As a part of its 2000 - 2004 Strategic Plan, the United States-based Council on Foundations (COF) has created this webpage on good practice, accountability and standards. The page describes how good practice is integrated with the COF's strategic plan and has links to other websites that describe best practice for foundations and community foundations.

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Wings. Peer learning events. Codes and standards for grantmakers

http://www.wingsweb.org/programmes/peer_UK2005.cfm

Webpage published by : Worldwide Initiatives for Grantmaker Support (WINGS)

Last date modified: 2005

Visited on: 04/08/2006

This web page makes available online various resources related to codes and standards for grantmakers. They have been presented during the peer learning event organised by the

Worldwide Initiatives for Grantmaker Support (WINGS) association and hosted by the Community Foundation Network from the 20 to the 22nd of May 2005 in London.

Publisher's contact details:

Brussels : Worldwide Initiatives for Grantmaker Support Corporate Initiative (WINGS-CI)

Website: <http://www.wingsweb.org>

E-mail: wings@efc.be

Foundation accountability and effectiveness. - Washington, DC : The Aspen Institute, 2002. - 16 p.

This short pamphlet is a summary of the findings of a three day conference on the philanthropy landscape in the United States at the beginning of the 21st century. It offers several suggestions for increased foundation accountability and effectiveness towards reaching the potential of the United States third sector.

Available Online:

http://www.nonprofitresearch.org/usr_doc/Foundation_Statement.pdf

Publisher's contact details:

Washington, DC : The Aspen Institute

Website: <http://www.aspeninstitute.org>

E-mail: publications@aspeninst.org

Obedience to the unenforceable : ethics and the nation's voluntary and philanthropic community. - Washington, DC : Independent Sector, 1991/2002. - 30 p.

The United States-based Independent Sector (IS) wrote this statement of ethical behaviour for philanthropic organisations. It covers the theoretical aspects of ethical behaviour for philanthropists and suggests what philanthropic organisations should stand for and act upon in relation to ethics and values.

Available Online:
<http://www.independentsector.org/PDFs/obedience.pdf>

For additional information:
<http://www.independentsector.org>

Publisher's contact details:
Washington, DC : Independent Sector

Website:
http://www.independentsector.org/pubs_cart.htm

E-mail: info@IndependentSector.org

Foundations in Europe : society, management and law / Andreas Schlüter, Volker Then, Peter Walkenhorst (Ed.). - London : The Directory of Social Change ; Gütersloh : Bertelsmann Foundation ; Kent : Charities Aid Foundation (CAF), 2001. - XX, 875 p.

This book provides a comprehensive survey of the foundation sector in Europe. It includes comparative sections on the role of foundations in society and the legal framework of foundations, as well as thematic sections covering issues of governance, organisation and management.

For additional information:
<http://www.brookings.edu/press/books/foundationsineurope.htm>

Publisher's contact details:
London : The Directory of Social Change ; Gütersloh : Bertelsmann Foundation ; Kent : Charities Aid Foundation (CAF)

Website: <http://www.dsc.org.uk>

E-mail: info@dsc.org.uk

Funding Europe's solidarity : resourcing foundations, associations, voluntary organisations and NGOs in the member states of the European Union / Liam p. Doyle. - Brussels :

Association for Innovative Cooperation in Europe (AICE), 1996.

This report identifies and discusses issues of concern to Europe's third sector. It describes its size, impact, operating infrastructure, patterns of growth and fields of activity as well as analysing issues which impact the sector's effectiveness. Profiles of the third sector in individual countries are also provided.

Publisher's contact details:
Brussels : Network of European Foundations for Innovative Cooperation (NEF) formerly known as Association for Innovative Cooperation in Europe (AICE)

Website: <http://www.nefic.org/>

2. Self-regulation

Strengthening transparency governance accountability of charitable organizations : a supplement to the final report to Congress and the Nonprofit Sector.
- Washington, DC : Panel on the Nonprofit Sector, 2006. - 40 p.

The Panel of the Nonprofit Sector has released additional recommendations to the US Congress as part of its effort to strengthen the accountability of US charitable organisations. This supplemental report is a companion to the Panel's final report, which offers actions to be taken by the US Congress, Internal Revenue Service, and charitable organisations. This supplement focuses on nine areas, including international grantmaking and charitable solicitation among others. As the final report, its recommendations incorporate input from actors across the charitable community.

Available Online:
http://www.nonprofitpanel.org/supplement/Panel_Supplement_Final.pdf

For additional information:
<http://www.nonprofitpanel.org/supplement/>

Publisher's contact details:

Washington, DC : Panel on the Nonprofit Sector

Website: <http://www.IndependentSector.org>

Strengthening transparency governance accountability of charitable organizations : a final report to Congress and the Nonprofit Sector. - Washington, DC : Panel of the Nonprofit Sector, 2005. - 112 p.

This final report incorporates input from the US charitable community gathered through field hearings and conference calls. It proposes an integrated package of actions to be taken by charitable organisations, by the US Congress, and the Internal Revenue Service, which together would strengthen the sector's transparency, governance, and accountability. The Panel also released a supplemental report examining further areas which makes additional recommendations.

Available Online:

http://www.nonprofitpanel.org/final/Panel_Final_Report.pdf

For additional information:

<http://www.nonprofitpanel.org/final/>

Publisher's contact details:

Washington, DC : Panel of the Nonprofit Sector

Website: <http://www.IndependentSector.org>

Independent sector : issues : accountability

<http://www.independentsector.org/issues/accountability.html>

Website published by : Washington, DC : Independent Sector

Visited on: 31/07/2006

Description: In this section of its website, Independent Sector offers tools, resources, and links aiming to

help nonprofits and foundations improve practice and self regulation, as well as information on proposals being considered by policymakers to strengthen legislative and regulatory oversight. It also includes a compendium of standards and codes of ethics and a checklist for developing a statement of values and code of ethics.

Publisher's contact details:

Washington, DC : Independent Sector

Website:

http://www.independentsector.org/pubs_cart.htm

E-mail: info@IndependentSector.org

Codes of conduct for partnership in governance, text and commentaries / Tatsuro Kunnugi, Martha Schweitz. - Tokyo : The United Nations University, 1999. - 324 p.

Provisional Version presented to the World Civil Society Conference : Building Global Governance Partnerships 7-11 December 1999, Montreal. Pinpoints many of the strengths of civil society organisations, their outreach and diversity, fundamental values, and potential for constructive partnerships. Also covers the codes and principles established by the non-profit sector and how they relate to business and government. Full contents listing is provided.

For additional information:

<http://www.unu.edu/>

Publisher's contact details:

Tokyo : The United Nations University

Website: <http://www.unu.edu/pub.html>

E-mail: mbox@hq.unu.edu

Towards voluntary sector codes of practice : a starting point for voluntary organisations, funders and intermediaries / Julian Ashby. - York : Joseph Rowntree Foundation, 1997. - 51 p.

This report describes a proposed set of principles for voluntary organisations who wish to improve their performance and professionalism. The report begins with a sample code of practice and discusses such topics as effectiveness, accountability, standards, user involvement, governance, voluntary action, equality and fairness, as well as staff management. Appendices include several checklists and some terminology and further reading.

For additional information:
<http://www.jrf.org.uk/knowledge/findings/socialpolicy/SPvol.asp>

Publisher's contact details:

York : Joseph Rowntree Foundation

Website:
<http://www.jrf.org.uk/bookshop/details.asp?publID=69>

E-mail: publications@jrf.org.uk

L'argent du coeur / Nicholas Dufourcq (Dir.). - Paris : Hermann, 1996.

This volume includes various contributions from experts in the sector, which analyse the meaning of 'giving' from economic, philosophical and legal points of view. It includes and comments on the French code of practice (1991) that was set up by more than twenty associations with the goal to protect donors.

Publisher's contact details:

Paris : Hermann

Website: <http://www.hermann-editeurs.com/>

E-mail: hermann.sa@wanadoo.fr

Grantmaking and self-regulation / Lance C. Buhl. - Washington, DC : Council on Foundations, [198?]. - 111 p.

This collection of documents and articles was prepared by the United States-based Council on Foundations (COF). The documentation was written primarily but not exclusively by the COF and it includes memoranda, minutes, relating to self-regulation, ethics, standards and good practice in the philanthropic sector.

For additional information:
<http://www.cof.org/>

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org/>

E-mail: info@cof.org

3. Management General

Unlocking the power of the proxy : how active foundation proxy voting can protect endowments and boost philanthropic missions / Conrad McKerron. - New York : Rockefeller Foundation, 2004. - 60 p.

This report describes how foundations can and should institute a system of proxy voting, or a system by which shareholders can voice issues relating to corporate governance and ensure that their vote is cast. Proxy voting can reinforce the foundation's mission, support environmental and social goals as well as improve management, transparency and accountability. The report describes steps involved in creating a proxy voting system and ways in which to maintain and monitor it.

Available Online:

http://www.asyousow.org/publications/pow_erproxy.pdf

Publisher's contact details:

New York : Rockefeller Foundation

Website: <http://www.rockfound.org>

Funding effectiveness : lessons in building nonprofit capacity grantmakers for effective organizations. - San Francisco : Jossey-Bass, 2004. - 176 p.

This guide is meant for leaders of foundations and other non-profit organisations and describes the practice of capacity building. Case studies are used to illustrate how capacity building has been used to increase organisation effectiveness.

Publisher's contact details:

San Francisco : Jossey-Bass

Website:

<http://www.josseybass.com/WileyCDA/>

E-mail: consumers@wiley.com

Organizing foundations for maximum impact : a guide to effective philanthropy / Denis Prager. - Washington, DC : Aspen Institute, 2003.

This publication describes strategies for organising foundations so that they maximise their operational effectiveness and efficiency, as well as their programmatic effectiveness. It begins with a description of how foundations function in society and then describes management strategies from setting and evaluating goals and accomplishments, to organising board members, executive management, and staff.

Publisher's contact details:

Washington, DC : Aspen Institute

Website: <http://www.aspeninstitute.org>

Foundations for success : emerging trends in grantmakers' use of internet. - Washington, DC : Interactive Applications Group, Inc, 2004. - 28 p.

A consultancy report on the emerging trends in grantmakers' use of the Internet. It describes the evolution of the first 10 years of funders using the

Internet and the ways in which the Internet is used as a tool to promote transparency, network building, knowledge management, and integrated grants management.

Available Online:

http://www.iapps.com/usr_doc/fnd4success_iapps.pdf

For additional information:

<http://www.iapps.com>

Publisher's contact details:

Washington, DC : Interactive Applications Group, Inc

Website: <http://www.iapps.com>

E-mail: info@iapps.com

The Wilder nonprofit field guide to crafting effective mission & vision statements / Emil Angelica. - Saint Paul : Amherst H. Wilder Foundation, 2001. - 71 p.

Describes a step-by-step process by which a non-profit organisation can arrive at a clearly defined mission and vision statement. Worksheets and definitions help staff and executives build ownership for the process and come to a common understanding of organisational goals, thereby increasing the possibility for positive impact on the community.

Publisher's contact details:

Saint Paul : Amherst H. Wilder Foundation

Website: <http://www.wilder.org>

E-mail: webmaster@wilder.org

Neue wege in der führung von stiftungen / edited by Robert V. Bennis. - Munich : Maecenata Verlag, 1999. - 73 p.

This volume contains documentation from the third Maecenata conference on the subject of donation management. In the collection of papers, authors topics include how to develop endowments,

communications, transparency and marketing.

For additional information:
<http://www.maecenata-verlag.de/varia/bennigsen.htm>

Publisher's contact details:
Munich : Maecenata Verlag
Website: <http://www.maecenata-verlag.de>
E-mail: mi@maecenata.de

Staffing resources and program issues. - Washington, DC : Council on Foundations, 1998. - 116 p.

This foundation management guidebook provides comparative information on staffing by grantmaker type and asset size and includes information on both paid and unpaid employees. It also has information on grantmaking-programme and management issues.

Publisher's contact details:
Washington, DC : Council on Foundations
Website: <http://www.cof.org>
E-mail: info@cof.org

Everyday ethics : key ethical questions for grantmakers and grantseekers / Sandra Trice Gray (Ed.). - Washington, DC : Independent Sector, [199?]. - 20 p.

This workbook contains a series of key questions that can serve as a starting point for reflection on the ethical behaviour of an organisation. These questions cover management issues which are common to many third sector organisations, including commitment to the public good over commitment to the self and the prudent application of resources.

Publisher's contact details:
Washington, DC : Independent Sector
Website:
http://www.independentsector.org/pubs_cart.htm
E-mail: info@IndependentSector.org

Guide to donor involvement : basic considerations and best practices. - Washington, DC : Council on Foundations, 1996. - 93 p.

This manual provides advice for establishing a working relationship between community foundations and their donors and how to remain inside of federal law for gathering donations.

Publisher's contact details:
Washington, DC : Council on Foundations
Website: <http://www.cof.org>
E-mail: info@cof.org

3.1. Governance

The source : twelve principles of governance that power exceptional boards. - Washington, DC : The Board Source, 2005.

Exceptional boards add significant value to their organisations, making discernible differences in advancing their missions. This book studies how a board rises to this level, defining governance not as a dry, obligatory compliance, but as a creative and collaborative process that supports chief executives, engages board members, and furthers the causes they all serve. This publication aims at helping non-profit boards make the best of their collective capacities.

For additional information:
http://www.boardsource.org/Bookstore.asp?category_id=25&Item=171

Publisher's contact details:
Washington, DC : The Board Source
Website: <http://www.boardsource.org>
E-mail: mail@boardsource.org

Peer learning event on governance and board development / Gaynor Humphreys. - Brussels : Worldwide Initiatives for Grantmaker Support (WINGS), 2004. - 24 p.

Raising the standards of governance and institution-building processes is a continuing challenge for both emerging and more established grantmaker associations in different parts of the world. This report summarises the presentations and discussions from the peer learning event held in Washington, DC in September 2004, which aimed to assist grantmaker associations in developing an understanding of the process of board development. It also aims to clarify the roles and responsibilities of the association's members, its board and its staff team in terms of their respective leadership responsibilities, authority and accountability.

Available Online:

<http://www.wingsweb.org/download/PLE-USA04-Report.pdf>

For additional information:

http://www.wingsweb.org/programmes/peer_US2004.cfm

Publisher's contact details:

Brussels : Worldwide Initiatives for Grantmaker Support (WINGS)

Website: <http://www.wingsweb.org>

E-mail: wings@efc.be

Boards that work : a guide for charity trustees / David Fishel. - London : Directory of Social Change, 2003. - 328 p.

The underlying principles of boards of directors and management committees are the focus of this book. Based on case studies and interviews with board members and chief executives from voluntary organisations, it describes the responsibilities of, processes for and resources for effective management using this model.

Publisher's contact details:

London : Directory of Social Change

Website: <http://www.dsc.org>

Governing boards. - Washington, DC : Council on Foundations, 2002. - 116 p.

This foundation management guidebook examines the structure and size of foundation boards. It provides information on board member compensation, professional services, insurance, grant-making and board member demographics.

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Self-assessment for foundation boards / Joshua Mintz, Denise Cavanaugh, Jane Pierson. - Washington, DC : BoardSource, 2000. - 66 p.

This guide offers ideas on how to stimulate communication among board members and the chief executive as well as ways to identify areas of board governance that need attention. The guide is accompanied by a questionnaire for board members to begin the process.

Publisher's contact details:

Washington, DC : BoardSource

Website: <http://www.boardsource.org>

Self-assessment for nonprofit governing boards kit. - Washington, DC : BoardSource, 1999. - 60 p.

In this self-assessment exercise, board of director members are asked to fill out a questionnaire to evaluate the boards performance and their contribution to it. The questionnaires are accompanied by a users guide that facilitates analysis and tabulation of results.

Publisher's contact details:

Washington, DC : BoardSource

Website: <http://www.boardsource.org>

Nonprofit boards : roles, responsibilities, and performance /

Diane J. Duca. - New York : John Wiley & Sons, 1996. - 208 p.

This publication outlines several different approaches to board structures and management for non-profit organisations. The author gears her advice primarily to chief executives and board members. Chapters cover governance, board size obligations, fund raising, legal and ethical issues, diversity, evaluation and meetings. Checklists and flowcharts to facilitate more effective board operations and to improve board members' management skills are included. Appendixes incorporate a sample code of ethics reprinted from a hospice in Florida and a sample 'position specification' from a charity that advertised for a new executive director.

For additional information:
<http://www.wiley.com/WileyCDA/WileyTitle/productCd-0471130206.html>

Publisher's contact details:
New York : John Wiley & Sons
Website: <http://www.wiley.com/WileyCDA/>
E-mail: consumers@wiley.com

Ten basic responsibilities of nonprofit boards / Richard T. Ingram. - Washington, DC : National Center for Nonprofit Boards, 1995. - 22 p.

This pamphlet, which was designed by a United States-based resource centre for non-profit management, describes the fundamental responsibilities of boards. It also includes a short list of responsibilities for board members as individuals.

Publisher's contact details:
Washington, DC : National Center for Nonprofit Boards
Website: <http://www.boardsource.org>

3.2. Staff / Volunteers management

Benefits and personnel policies. - Washington, DC : Council on Foundations, 1999.

This foundation management guidebook describes various benefit plans offered by foundations to their full-time, part-time and retired employees including retirement, health, life insurance and other types of benefits. Also considered are different types of leave, severance allowances and travel time.

Publisher's contact details:
Washington, DC : Council on Foundations
Website: <http://www.cof.org>
E-mail: info@cof.org

Financial Compensation in Nonprofit Organisations / Brian O'Connell. - Maryland : Independent Sector Publications, 1995. - 100 p.

The recent spate of reports concerning the salaries of employees of non-profit organisations has raised questions in the minds of the general public about the appropriateness of the compensation of chief executives of organisations dedicated to serving society that depend primarily on voluntary contributions. These developments also highlight that the average board of trustees of a non-profit organisation, while legally and practically responsible for establishing the salary of the chief staff officer, often lacks a framework within which to assign appropriate compensation for an organisation's employees.

Publisher's contact details:
Maryland : Independent Sector Publications
Website: http://www.independentsector.org/pubs_cart.htm
E-mail: info@IndependentSector.org

3.3. Equality & Fairness (Equal opportunities)

Fairness in funding : an equal opportunities guide for grant-makers / Roland Doven, Fiona Ellis. - London : Association of Charitable Foundations, 1995. - 63 p.

This handbook for grantmaking draws on the experience of the UK's grantmaking trusts and foundations, to provide a guide for grantmakers who wish to improve fairness in grantmaking. It advocates policies that provide equal access to funds for all organisations and individuals and ways to guard against the perpetuation of myths or stereotypes about certain grantseekers.

For additional information:
<http://www.acf.org.uk/publications/goodprac.htm>

Publisher's contact details:
London : Association of Charitable Foundations
Website: <http://www.acf.org.uk>
E-mail: ahubrath@acf.org.uk

3.4. Grant-making (from assessing applications to funding)

Best practices in grants management. - Washington, DC : Council on Foundations, 2001. - 124 p.

This guidebook describes the process of how to administer grants: from evaluating a proposal and a grantee to closing the files when the grant is expired. It has sample letters and forms in appendices and tips on how to track and evaluate programmes.

Publisher's contact details:
Washington, DC : Council on Foundations
Website: <http://www.cof.org>
E-mail: info@cof.org

Establishing grants administration procedures / A. Scott DuPree, David Winder [et al.]. - New York : The Synergos Institute, 2000. - 18 p.

This set of guidelines is extracted from a complete guide to grants administration. The guidelines describe how to set up and follow a procedure to administer grants: from creating an application form to evaluating proposals.

Available Online:
<http://www.synergos.org/globalphilanthropy/00/fbsprogram5.pdf>

Publisher's contact details:
New York : The Synergos Institute
Website: <http://www.synergos.org>
E-mail: synergos@synergos.org

The insider's guide to grantmaking : how foundations find, fund, and manage effective programs / Joel J. Orosz. - San Francisco : Jossey-Bass, 2000. - 303 p.

This guide gives practical suggestions and guidelines for making foundation grants and developing skills for effective and ethical grantmaking. The author outlines the place of foundations in society and history, as well as the role of programme officers in daily foundation operations. Among other topics, it describes how to build relationships with grantees and how to review and decline their proposals, how to ensure that funds are being used properly and how to evaluate impact.

Publisher's contact details:
San Francisco : Jossey-Bass
Website: <http://www.josseybass.com>

3.5. Finance / Investment

The investor's toolkit : generating multiple returns through a unified

investment strategy / Jed Emerson, Timothy Freundlich, Shari Berenbach. - [s.l.] : [s.n.], 2004. - 38 p.

This paper offers an introduction to the concept of managing financial assets using a strategy that maximises not only economic performance, but also social and environmental returns. It also explores the current state of this evolving investment approach, as well as the logic driving its inevitable expansion. This work is intended to broaden understanding of the diverse investment vehicles presently available, as well as to analyse how these trends might play out for different types of investors. The future of financial asset management as a field is also considered.

Available Online:
<http://www.blendedvalue.org/media/pdf-investors-toolkit.pdf>

For additional information:
<http://www.blendedvalue.org/publications/additional.html>

Publisher's contact details:
Website: <http://www.blendedvalue.org>
E-mail: jed@blendedvalue.net

Succeeding with social enterprise : quick tips for building sustainable non-profit organisations through earned income / Warren Tranquada, John Pepin. - London : Directory of Social Change, 2004. - 45 p.

This reference guide provides information for non-profit organisations that either have or plan to have a business that will provide funding for its mission. It gives tips on how to maximise the value earned by an enterprise.

Publisher's contact details:
London : Directory of Social Change
Website: <http://www.dsc.org>

Total foundation asset management : exploring elements of engagement within philanthropic practice / Jed Emerson. - [s.l.] : [s.n.], 2003. - 21 p.

This essay discusses foundation assets and addresses the question of how foundation staff should work to engage those assets in the creation of value, and how those concerned with fulfilling the true potential of philanthropy should view returns generated as a result of the appropriate allocation of those foundation assets.

Available Online:
<http://www.blendedvalue.org/media/pdf-foundation-asset-management.pdf>

For additional information:
<http://www.blendedvalue.org/publications/additional.html>

Publisher's contact details:
Website: <http://www.blendedvalue.org>
E-mail: jed@blendedvalue.net

Building your endowment / Edward C. Schumacher. - San Francisco : Jossey-Bass, 2003. - XIX, 88 p.

This book describes ways in which an endowment programme can be put in place in a non-profit organisation. It is designed as a practical approach to endowment fund raising, therefore much of its content consists of worksheets. The workbook format allows users to apply the ideas and concepts presented therein to their organisation.

For additional information:
http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787960101_descCd-tableOfContents.html

Publisher's contact details:
San Francisco : Jossey-Bass
Website: <http://www.josseybass.com>
E-mail: permcoordinator@wiley.com

2002 investment performance and practices of community foundations / Michael A. Miller. - Washington, DC : Council on Foundations, 2003. - 112 p.

This annually updated publications describes investment performance and practice of a selection of community foundations in the United States. Finances are compared in charts and tables and analysed in areas such as asset composition, relationship of composition to performance, and fees paid for management. A glossary of terms is included.

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

The role of foundations in sustainable development : statement for Johannesburg (WSSD). - Osnabrück : Bellagio Forum for Sustainable Development, 2002. - 2 p.

This statement was prepared by the Bellagio Forum, an organisation composed of foundations that promote sustainable development. In the statement, the authors describe their mission to promote sustainable development and how it relates to a forthcoming summit on the topic.

Available Online:

<http://bfdserver.enovum.com/en/components/docman/dl2.php?archive=0&file=c3RhdGVtZW50X3dzc2QucGRm>

For additional information:

<http://bfdserver.enovum.com/en/content/view/22/57/>

Publisher's contact details:

Osnabrück : Bellagio Forum for Sustainable Development

Website: <http://www.bfsd.org>

E-mail: info@bfd.org

Finances, portfolio composition, investment management and administrative expenses in private foundations. - Washington, DC : Council on Foundations, 2001. - 96 p.

This foundation management guidebook discusses the basics of financial management and investment for philanthropists.

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Ethical investment : how the Joseph Rowntree Charitable Trust does it. - York : The Joseph Rowntree Charitable Trust, 1997. - 28 p.

A short review describing the history and basics of the process of ethical investment. The example for ethical investment is taken from the Joseph Rowntree Charitable Trust, which hopes to further its goals by investing in a socially responsible manner.

For additional information:

<http://www.jrct.org.uk/text.asp?section=000100030007>

Publisher's contact details:

York : The Joseph Rowntree Charitable Trust

Website: <http://www.jrct.org.uk/>

E-mail: angela.forster@jrct.org.uk

Investissements éthiques : expériences françaises et étrangères / Alain Ragot, Hugues Robert. - Paris : Fondation de France, 1990. - 32 p.

Based on the American experience in the field of ethical investments, this study identifies ways that French associations can use ethical investment as a funding source.

Publisher's contact details:

Paris : Fondation de France

Website: <http://www.fdf.org>

E-mail: fondation@fdf.org

3.6. Communication / Knowledge management

Knowledge management : where foundations in Europe stand and where they want to go - Results of a survey on knowledge management, April 2004. - Brussels : European Foundation Centre & King Baudouin Foundation, 2004. - 7 p.

This report describes and analyses the results of a survey conducted by the European Foundation Centre and the King Baudouin Foundation about the issue of knowledge management in European foundations. Funders were asked about the existence and types of knowledge management they use, objectives for knowledge management, and what types of tool foundations use for knowledge management.

Available Online:

<http://www.efc.be/ftp/public/kmsurvey/kmrresults.pdf>

For additional information:

<http://www.efc.be>

Publisher's contact details:

Brussels : European Foundation Centre & King Baudouin Foundation

Website: <http://www.efc.be>

E-mail: library@efc.be

3.7. Evaluation

Reflections on philanthropic effectiveness / Jed Emerson. - [s.l.] : [s.n.], [2004?]. - 12 p.

This paper is based upon the comments, thoughts and ideas of over 35 foundation representatives brought together in Heidelberg, Germany, as part of the International Network on Strategic Philanthropy. It is not a

comprehensive review of issues related to philanthropic effectiveness, but rather a reflection of how some of those involved in philanthropy approach a question that is viewed with increasing importance, namely: How should we best pursue efforts to maximise the effectiveness of philanthropy?

Available Online:

<http://www.blendedvalue.org/media/pdf-philanthropic-effectiveness.pdf>

For additional information:

<http://www.blendedvalue.org/publications/additional.html>

Publisher's contact details:

Website: <http://www.blendedvalue.org>

E-mail: jed@blendedvalue.net

Foundations and evaluation : contexts and practices for effective philanthropy / edited by Marc T. Braverman, Norman A. Constantine, Jana Kay Slater. - San Francisco : Jossey-Bass, 2004. - 352 p.

Based on research funded by the Packard Foundation, this book provides a guide to the practice of evaluation in the foundation world. It has contributions from many of the leading figures in the field of evaluation and promotes the use of evaluation within the foundation framework.

Publisher's contact details:

San Francisco : Jossey-Bass

Website:

<http://www.josseybass.com/WileyCDA/>

E-mail: consumers@wiley.com

Assessing performance at the Robert Wood Johnson Foundation : a case study / Phil Guidice, Kevin Bolduc. - Cambridge : The Center for Effective Philanthropy, 2004. - 15 p.

This case describes the efforts of one foundation to establish a foundation-wide performance assessment system

to evaluate how effectively the organisation was performing and to identify ways in which to improve the way it functions.

Available Online:
<http://www.openminds.com/indres/rwjfcasestudy.pdf>

For additional information:
<http://www.effectivephilanthropy.com>

Publisher's contact details:
Cambridge : The Center for Effective Philanthropy

Website: <http://www.effectivephilanthropy.org>
E-mail: alysed@effectivephilanthropy.org

NGO manager organisational assessment tool (OAT) / Marco Kirschbaum. - [s.l.] : NGO Management Group, 2004. - 24 p.

The purpose of the Organisational Assessment Tool (OAT) is to help organisations to assess their situation with regard to leadership, performance and results. It aims to facilitate the finding of strong and weak areas, causes of problems and identification of appropriate solutions. The OAT focuses on six dimensions to improve management capacity: governing structure, management processes, human resources, financial resources, relationships and results. Useful references about evaluation are included.

Available Online:
http://www.ngomanager.org/tools/OAT_July_2004.pdf

For additional information:
<http://www.ngomanager.org/tools.htm>

Publisher's contact details:
NGO Management Group

Website: <http://www.ngomanager.org/index>
E-mail: editors@ngomanager.org

A measured approach : impact assessment report. - London : Lloyds TSB Foundation for England and Wales, 2003. - 59 p.

This report describes the foundation's plan to undertake a 3 year pilot study to assess the impact they have on the community in which they operate. This particular volume focuses on the 2002 evaluation exercise.

Available Online:
http://www.lloydstsbfoundations.org.uk/downloads/a_measured_approach_full.doc

For additional information:
http://www.lloydstsbfoundations.org.uk/impact_assessment.html

Publisher's contact details:
London : Lloyds TSB Foundation for England and Wales

Website:
<http://www.lloydstsbfoundations.org.uk>
E-mail:
Guidelines@lloydstsbfoundations.org.uk

When and how to use external evaluators / Tracey A. Rutnick, Marty Campbell. - Baltimore : Association of Baltimore Area Grantmakers, 2002. - 12 p.

This report describes how external evaluators can be used to help foundation set set programme goals, identify lessons, make midcourse adjustments, and measure programme effectiveness. It also gives tips on how to frame the consulting engagement to produce the maximum benefit. A short glossary of evaluation terms is included.

Available Online:
http://www.nyrag.org/usr_doc/UsingEvalConsultants.pdf

Publisher's contact details:
Baltimore : Association of Baltimore Area Grantmakers

Website: <http://www.abagmd.org>

E-mail: info@abagmd.org

Indicators of effectiveness : understanding and improving foundation performance. - Boston : The Center for Effective Philanthropy, 2002. - 42 p.

This publication describes ways in which foundations can assess and improve their performance and social impact. Descriptions of current practice are based on interviews with foundation executives as well as surveys taken from 3500 foundations, based in the United States and active in 23 countries, as to how they conduct performance assessment.

Available Online:
<http://www.lawrenceassociates.com/Files/TCEPIndicatorsofEffectiveness.pdf>

Publisher's contact details:
Boston : The Center for Effective Philanthropy
Website: <http://www.effectivephilanthropy.org>
E-mail: alysed@effectivephilanthropy.org

Striving for philanthropic success : effectiveness and evaluation in foundations. - Gütersloh : Bertelsmann Foundation, 2001. - 176 p.

The volume includes the presentations and opening statements made at the 2000 International Foundation Symposium sponsored by the Bertelsmann Foundation. The core questions dealt with are: the relationship of output, outcome and impact of foundation work, transparency and accountability of foundations, and the establishment of efficient management structures within the sector.

Publisher's contact details:
Gütersloh : Bertelsmann Foundation
Website: <http://www.bertelsmann-stiftung.de>
E-mail: info@bertelsmann-stiftung.de

Assessment of the chief executive / Jane Pierson, Joshua Mintz. - Washington, DC : Boardsource, 1999. - 48 p.

This handbook suggests a process and provides tools for boards of directors to use when they are evaluating the performance of a chief executive. It also provides an analysis of how annual reviews can be beneficial when evaluating management performance. An example of a questionnaire to measure the level of satisfaction with how the chief executive is carrying out their responsibilities is included.

Publisher's contact details:
Washington, DC : Boardsource
Website: <http://www.boardsource.org>

Monitoring and evaluation : a practical guide for grant-making trustees / Des Palmer. - London : Association of Charitable Foundations, 1998. - 84 p.

Handbook aimed at funders which gives guidance on how to monitor and evaluate both their own work and that of the organisations they fund. The book is divided into four sections including: an introduction to monitoring and evaluation; an outline of various monitoring and evaluation techniques; an example of how best to manage workload; and ideas on how to encourage the promotion of monitoring and evaluation as routine practice.

Publisher's contact details:
London : Association of Charitable Foundations
Website: <http://www.acf.org.uk/publications/order.htm>
E-mail: ahubrath@acf.org.uk

European foundations and corporate funders : evaluation methods. - Brussels : European

Foundation Centre & Compagnia di San Paolo, 1998. - 32 p.

Presentation of the results of a survey carried out by the European Foundation Centre (EFC) and Compagnia di San Paolo. These results were made public at the EFC General Assembly and Conference in Turin in November 1998. The questionnaire asked participants to describe three phases of grantmaking activity and external evaluation of projects. Results are analysed through statistics, graphics and written explanation.

Available Online:

<http://www.compagnia.torino.it/english/comunicazioni/pdf/report.pdf>

Publisher's contact details:

Brussels : European Foundation Centre & Compagnia di San Paolo

Website: <http://www.compagnia.torino.it>

E-mail: info@compagnia.torino.it

Evaluation with power : a new approach to organizational effectiveness, empowerment, and excellence / Sandra Trice Gray [et al]. - San Francisco : Jossey-Bass, 1997. - 178 p.

In this book, the authors attempt to present a new vision of evaluation as a means of organisational learning to support mission attainment.

Organisational effectiveness and considering evaluation as ongoing, internal, achievable and educational object are principles which are highlighted. Issues such as increasing the effectiveness of evaluation as a useful management tool and using evaluation to strengthen key areas of grantmaking policy are covered.

Publisher's contact details:

San Francisco : Jossey-Bass

Website:

<http://www.josseybass.com/WileyCDA/>

E-mail: consumers@wiley.com

Evaluation essentials for small private foundations / Alfred L. Castle. - Washington, DC : Council on Foundations, 1991. - 16 p.

This manual provides advice for evaluating grantmaking activities and guides a grantmaker through the process beginning with a pre-grant evaluation, monitoring the project's process and post-grant assessment.

Publisher's contact details:

Washington, DC : Council on Foundations

Website: <http://www.cof.org>

E-mail: info@cof.org

Sustainability index for information and resource centres : self-evaluation tool for the Orpheus Civil Society Network. - [s.l.] : Orpheus Civil Society Network, [199?]. - 9 p.

This self-evaluation tool was written to help an organisation assess its effectiveness either on its own or with the help of a consultant. It describes ways in which to reflect on various aspects of best practice including vision, resource management, service provision, human resources, financial management, and external relations.

Publisher's contact details:

Orpheus Civil Society Network

4. Disclosure & public accountability

4.1. Communication to the public / media

Foundations and public information : sunshine or shadow. - Washington, DC : National Committee for Responsive Philanthropy (NRCP), 1980.

This study was one of the first analyses of public information on the largest foundations in the United

States. As well as describing statistics on accountability and public information, it makes recommendations for change. Since it was released, and has led to major changes in the information the US Internal Revenue Service requires including making annual reports. Identifies 22 key items of information that all foundations should disclose.

Publisher's contact details:

Washington, DC : National Committee for Responsive Philanthropy (NRCF)

Website: <http://www.ncrp.org>

E-mail: info@ncrp.org

4.2. Reporting

Corporate philanthropy and public reporting : sunshine or shadow. -

Washington, DC : National Committee for Responsive Philanthropy (NRCF), 1988. - 15 p.

This volume examines the public reports of two hundred top profit-making corporations which publicise their grantmaking activities. The document serves to examine the quality of this reporting, based on a twenty-seven criteria 'disclosure scale' developed by the National Committee for Responsive