



Case Studies of Organizations Supporting Community Foundations:

Preface

Introduction

During 2001, WINGS-CF worked to develop a set of case studies describing the various forms of organizations supporting community foundations. From February to October, a WINGS-CF working group, UK-based consultant Diana Leat, and eight very different regional and national organizations assisting the development of community foundations in very different parts of the world, worked together to profile their organizations. The result is an Overview, describing the key trends and lessons learned from the case studies, as well as eight individual profiles. These can be accessed on the WINGS-CF website, in Portable Document Format (PDF).

The first section of each case study provides general background on the organization's structure, resources and activities, its involvement in community foundation development, and a picture of the environment of the region or country in which it is operating. The second section of each case study provides greater detail on an aspect of the organization, such as staffing, services for community foundations, or financial sustainability.

The eight organizations included in the case study project between them illustrate the various forms of organizations supporting community foundations, capture regional/country differences, and describe organizations at different stages of development.

The case studies are intended primarily to help strengthen WINGS-CF organizations in their work. They are also intended to be used as a partner piece with Volume 1 in this series, *Case Studies of Grantmaker Associations Around the World*. Volume 1 also includes an Introductory Essay which provides an intellectual and visionary statement about the value of philanthropic support organizations.

Project notes

- ▶ The project was truly global in nature, with the project consultant alternating between Australia and the United Kingdom, the WINGS-CF project coordinator in Canada, and the profiled organizations in Belgium, Brazil, Italy, Latvia, Poland, South Africa, the United Kingdom, and the United States. The working group members came from yet other parts of the globe, including Mexico and Slovakia.
- ▶ Sixteen out of 50 organizations—or 32 percent of the network—were actively involved in some way in the project (e.g., providing feedback as a working group or advisory committee member, or directly involved as a profiled organization).
- ▶ Profiled organizations involved several staff members and sometimes other resource people in preparing the text for their draft case studies.

- Financial support for the research/writing was requested by and provided to two of the eight profiled organizations.
- The project consultant prepared an outline for each organization to review and discuss with the consultant, before preparing their organization's first draft. The consultant then worked with the organization, the WINGS-CF project coordinator and the working group: to clarify, seek additional or supporting information, and finalize the text.
- Most of the work conducted took place through e-mail. Telephone conversations took place from time to time, but the project was largely electronic in nature.
- The project was completed on time in spite of delays with individual timelines: local priorities and circumstances proved to be a significant factor for those involved, although all involved demonstrated a commitment to completing the project once "signed on." All WINGS-CF organizations are busy and overloaded, regardless of their financial and human resources, age/experience, etc. (Note: Two of the organizations initially invited to participate could not, due to time constraints, and a third organization approached as a replacement also declined.)
- Use of a consultant (21 days) to prepare an initial outline for the case studies, to liaise with profiled organizations, to conduct additional research and to prepare the drafts was essential. This arrangement ensured the presence of a "voice" throughout the series of case studies (which are otherwise very different in many ways) and made the project possible in terms of the time commitment involved.
- The time required by WINGS-CF staff, even with a consultant in place, was considerable. This involved handling working group communications, helping out with relationships/discussions with profiled organizations when needed, providing additional background on organizations and the original project terms of reference for the consultant, and spending a great deal of time on reading, editing and formatting documents.

- More "back and forth" took place between the consultant and WINGS-CF staff before the working group was involved in reading drafts, etc., than originally planned. It proved to be helpful to do a pre-read of all documents, address key gaps or questions, and prepare drafts in a consistent format before sharing materials with time-pressed working group members.

Project Learnings

During the course of this project, we heard from a number of colleagues outside the network about how challenging—impossible, in fact—distance/electronic projects of this kind could be. A number of people said to us that we were the only successful project of this kind they had heard of. A number of factors undoubtedly contributed to the success of the project:

- The WINGS-CF project coordinator and the project consultant had met before and both had experience of working in different countries.
- The WINGS-CF project coordinator had already met most of the people in the profiled organizations and the working group at a WINGS-CF Peer Meeting.

Both of these factors helped to give e-mails sent to one another a higher priority, so that they would be read and acted on fairly quickly.

- The project had been agreed upon as a high priority by the organizations in the WINGS-CF network, so the commitment to undertake the project was strong.
- A high level of mutual interest and trust existed in the network.

These two factors are essential if the project is to be valued and therefore made a priority even when other work is competing for attention.

- The project consultant had strong experience and understanding of the foundation world, including community foundations, and their support organizations.



- The teaming of the project coordinator and consultant was effective, as they encouraged each other to keep motivated when the project was dragging or frustrations had been encountered.

The value of a good pairing and mutual understanding cannot be underestimated.

- The working group's members—from Mexico, Latvia, the United States and Slovakia—were particularly helpful in asking very specific questions that only colleague organizations could formulate, as well as for helping to ensure that the language used throughout the case studies was clear and accessible for a global, multi-lingual audience.
- Finally, one of the most significant learnings of the project is the difficulty for some organizations to be completely transparent within the case studies about difficulties or challenges facing the organization. While there is a great deal of candor throughout the eight case studies, which is particularly helpful for other colleague organizations, it was not always possible for the profiled organizations to share every challenge they have encountered. Much of this information, of course, is shared informally, when network participants meet.

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WINGS-CF is grateful for the efforts of all involved in the development of these case studies, including the Working Group members who provided guidance throughout, the organizations which participated so fully in the development of their own case studies, and our lead consultant, Diana Leat. The case studies are the result of a group effort and owe their richness and strength to that collective experience.

About the Editor:

Diana Leat is a Senior Research Fellow at the Centre for Civil Society at the London School of Economics. In addition to her academic appointments, Dr. Leat has been a consultant to various grantmaking foundations in the UK and Australia, has written extensively on issues facing grantmaking foundations, and has worked with Community Foundation Network in the UK. Dr. Leat's first work with WINGS-CF was as the lead consultant and editor in this volume of case studies, since which time she has also been involved in evaluating the effectiveness of WINGS-CF's peer matching program.