

Value(s) for Money? Philanthropy as a Catalyst for Social and Financial Transformation

MODELS FOR
THE IDEAL
ECOSYSTEM
FOR SOCIAL
TRANSFORMATION

The NATURAL Ecosystem
is the best example already



Session 530

Salzburg, March 6 to 9, 2014

Value(s) for Money?

Philanthropy as a Catalyst for Social and Financial Transformation

SALZBURG
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Photos:

Herman Seidl &

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Program Goals and Summary

As the international community looks to finalize the Sustainable Development Goals in 2015, significant focus is being placed on what it takes to foster deep social change that not only meets metrics but also shifts societies' decision-making and service delivery mechanisms. Due to its independence and flexibility of funds, philanthropy is seen by many international actors as a means to catalyze thinking and test systems for social change.

Although resources commanded by foundations and institutionalized philanthropy are minute – estimated to be 2.3% of the global financial system – philanthropic funds and private social capital are increasingly used to tackle difficult problems and leverage progress in human rights and development. In recent years there has been a rapid emergence of innovative mechanisms, such as global funds, crowdsourcing, social impact bonds, payments for ecosystem services and prize-backed schemes. These have diversified the funding landscape and generated new opportunities and resources. However, are traditional and emerging philanthropic systems structured to support and foster deep social change?

Building on their long-standing work in philanthropic systems and role in supporting and catalyzing social change, Salzburg Global Seminar and HIVOS convened an international program to analyze current funding methods and explore ways to build a healthier funding ecosystem for social change. The program, *Value(s) for Money? Philanthropy as a Catalyst for Social and Financial Transformation*, was a high-level dialogue and strategic synthesis of emerging risks and trends in the funding of social transformation as explored in a provocative paper *Beauty and the Beast: Can Money Ever Foster Social Transformation*, by Michael Edwards, which examined the deep uncertainty in the relationship between money, power and social change.



Facilitator John Harvey leads a plenary session in Parker Hall

Participants and Structure

Program participants represented a cross-section of leaders and entrepreneurs from international philanthropy, development, finance, research and policy. Under the direction of Salzburg Global and HIVOS, participants met March 6-9, 2014 in Salzburg, Austria in the retreat atmosphere of Schloss Leopoldskron, to consider whether today's funding systems are capable of meeting systemic social and environmental challenges in a world marked by deteriorating prospects for people and planet. Participants were tasked to consider this core thesis and its effect on a sector that works notably through the distribution of money and to see themselves as part of an ecosystem, where different funding streams and approaches are matched, appropriately, to different needs. In this frame, money is not a limited prize, for resources are applied using variable approaches that best match the problem. They were asked to apply ecosystem thinking and identify core elements, beyond philanthropy, of a healthier and more balanced ecosystem that enables social and financial transformation. The program was structured with daily panels, plenary debates and working groups that prototyped new thinking. During the session, participants examined:

- Current philanthropic practice, from donor motivations to how results are measured and integrated for long-term change;
- Philanthropic significance to global financial flows and possible leverage points;

- A case study on institutional philanthropy's effectiveness in supporting social change;
- Systems thinking and applications to philanthropy;
- Michael Edwards' conceptual model of a healthy funding ecosystem; and
- Strategic frameworks of a healthy ecosystem.

Participants brought considerable experience and also notable differences to the dialogue. Philanthropy is made up of diverse players, with unique distinctions and divisions. Therefore, it is difficult to reach consensus on the value that philanthropy should deliver. This has implications on current and future practice. However, all participants agreed that the a current global trajectory focussed on largely unsustainable growth requires adjustment; yet determining what kinds of systems-level changes are required and how to realize them remained points of dispute. Trade-offs, “known unknowns” and “unknown unknowns” all came into question and garnered diverging responses. International aid and development, community activists, policy specialists, and others are also grappling with similar questions of how to make money a more positive force for change, including whether an ecosystem approach to different funding modalities that balances different approaches and funding streams, could be a way to stimulate new thinking and innovative practice.



Michael Edwards during a session at Salzburg Global Seminar



Aminata Sillah helps her group formulate their ecosystem thinking

Results

The complexity and particular challenges of problems that require deep systems change are not new. Nevertheless, the opportunity to wrestle with trade-offs inherent to transformation beckoned participants to reconsider their decision-making processes and how to improve their work.

As eluded to in *Beauty and the Beast*, participants had differing interpretations of transformation, with some viewing innovations like social enterprise and new technologies as transformative in and of themselves. However, others were, as Edwards put it, seeking “a fundamental shift in the structures of self and society that underpin the ‘delivery mechanisms’ of social change like laws, policies and services, and the institutions of government and the market.”

The program shaped new dialogue on responsive philanthropy and funding for deep social change and how to influence current and future investments and policies from international to local levels.

It examined the unwritten “rules” that guide how funding systems operate. There were differences between philanthropic actors on:

- How funds are generated;
- Expressions of value in funding and programming;
- How to innovate towards value and how philanthropy can best add value, using its comparative and competitive advantages; and
- Ecosystem thinking where components work together for function and transformation (as not all components thrive and/or survive as they are).

The program resulted in the following consensus:

- Philanthropic actors must fully know their sector;
- Philanthropy’s potential to catalyze transformation is increasingly significant yet its inability to reach its full potential is problematic;
- How resources are made, collected, and distributed is as important as how much and how they are applied;
- Future research should examine effects of funding flows;
- There are certain biases and unwritten rules that govern philanthropic works; they must be acknowledged and appropriately managed;
- There is value in business-inspired or market-based approaches, but philanthropy requires more space to support social transformation activities;
- The relatively modest resources housed in foundations and organized philanthropy compels the field to work across systems;
- Due to philanthropy’s inherent abilities to scale, it should reach beyond its purview and directly engage with, coordinate among, and use the means of public and market systems to apply its considerable intelligence on addressing “wicked problems” to advance the public good;
- There is not a single purpose philanthropists work towards but different, distinct, and sometimes conflicting goals; the ecosystem analogy is fitting;
- Priority characteristics of healthy systems and interactions across systems include flexibility, diversity, commitment to a clear set of values, and long-term thinking on how to meet those value propositions;
- Philanthropic actors must be active creators of a healthier and more balanced ecosystem that reduces the gap between words and actions and supports change at different levels and through different, but complementary, strategies;

- In the quest to change norms, cultural assumptions, and attitudes, relevant and contextual evaluation measures are important;
- If philanthropy is to be risk-taking, failure needs to be reframed;
- Important innovations and new trends, although not explicitly philanthropic, have implications for the sector;
- Philanthropy must be particularly savvy and manage innovation and apply funds for maximum impact.

While it was evident that an ecosystem framework helped participants consider complex social change processes and roles in addressing them, concrete steps to help create a balanced system capable of supporting transformation remained elusive due to fundamental differences in the sector. Participants took away ideas, tools and possible models for applying systems thinking to their work. Most importantly, having honest dialogue on hidden challenges contributed to an important debate that is currently unfolding in the field of philanthropy and social-oriented funding.

Box 1: Diversity of Philanthropy

Some participants expressed discomfort with the perceived dominance of more “Western” styles of philanthropy in much of the discussion. Everyone acknowledged that other forms dominate in different regions and cultures. The recommendation was to “correct the bias” in other forums and discussions, and seek to apply the same key theses and ecosystem framing to different regional forms and norms.

Participants also pointed out that money is not the only, and perhaps not the most important resource that donors have at their disposal. Other resources include networks, system knowledge, and moral capital. However, focusing on money and values is relevant across all systems because of the close association between money, power and privilege in nearly every culture.

In addition, the power of individual giving, including remittances, Diaspora philanthropy, and faith-inspired giving is critical to change processes.

Because individual forms are not generally institutionalized or easy to direct, they have received less attention, at least in comparison to foundations and related organized giving structures. The ability to collect and direct these sources is changing rapidly (e.g. through crowd-funding) and participants recommended that future discussions include more emphasis on these aspects of the philanthropic landscape.

Case for Change

Social change and transformation matter, but challenging and shifting fundamental power dynamics requires activities that are difficult to quantify. Relevant outcomes are often difficult to measure and, conversely, measurable outcomes, such as legislation, are not necessarily demonstrative of true transformation.

Transformation, as Edwards described, is “closer to alchemy than engineering.”

The Global Challenge

The Millennium Development Goals (MDGs), a set of eight goals to significantly reduce extreme poverty and its effects by 2015, galvanized nations to focus on key levers of poverty reduction and human development and showcased global consensus on a value statement, common framework, and concrete and measurable indicators. Billions of private and public dollars were channeled to support programming within MDG guidelines, which lent strong messaging to efforts directed for the poor. Global poverty has been reduced and health outcomes radically improved. However, the MDGs were focused on outcomes and seldom addressed the “how” of change. Some indicators hit or missed the mark. Although successful per its metrics (i.e. it halved the number people living on 1.25 USD a day), the MDGs have received warranted criticisms due to the inability of countries to accurately measure indicators, their focus on outcomes, and their inability to examine processes (i.e. the halving off extreme poverty had a lot to do with China’s economic boom). Systemic changes have not taken hold, and thus many now question the sustainability of gains met. It can be argued that the process mattered most and the decoupling of systemic empowerment and social justice from MDG outcomes has stymied social transformation required for sustained progress.

As the international community looks to finalize the Sustainable Development Goals in 2015, there is significant focus on what it takes to foster deep social change that not only meets metrics but also shifts societies' decision-making and service delivery mechanisms. Substantial innovation and creativity is required to transform systems and sustain gains. The aid community sees philanthropic funds as a critical and largely missing piece in large-scale transformation efforts and is actively seeking collaboration. Although institutional philanthropy commands an estimated 2.3% of global finance, the philanthropic sector remains attractive due to its flexibility, independence, and experimental and catalytic nature when compared to other forms of aid and investment. As official development assistance shrinks in comparison to general international financial flows, the philanthropic community can be instrumental in the pursuit of transformation.

Baseline Analysis

In his provocative paper *Beauty and the Beast: Can Money Ever Foster Social Transformation*, Michael Edwards presents the philanthropic system as out of balance and less equipped to support social transformation. Most institutionalized philanthropic operations today are increasingly focused on data-driven results and relatively short-term timelines for demonstrating success. Grant making is organized around specific strategies, with goals and grantees most often judged by how well they help to meet a foundation's goals, not the strength of their processes. Along with too much emphasis on financial support through market



Salzburg Global Program Director Diasmer Bloie takes questions from the floor

systems and monetary returns on investments, there is less funding available for the deeper, less tangible drivers of social change – change that is driven by beneficiaries and is inherently more democratic.

Neglecting these fundamentals contributes to widening inequality and overlooks opportunities for imaginative and inclusive renewal of our societies. There seems to be too much emphasis on value for money rather than investing in values with money. This emphasis has further ramifications for how social transformation is supported – especially if, as some participants contended, those driving funding decisions do not always understand transformation. The inherently experimental nature of transformation dictates a need for more flexible funding that supports multiple processes and through which agendas are driven by grantees, rather than grantees needing to fit their efforts into donor agendas.

Money also presents a conundrum. It is most often created through systems that allow for, if not actively exacerbate, inequalities, injustice and poverty. This is not to malign money itself or those that earn it, but rather to highlight a fundamental issue: how money is earned may be as impactful as how it is applied. As social impact happens in complex systems, it is a challenge to balance long-term and downstream effects. Net impact analysis – examination of holistic social, environmental, and financial effects on direct and indirect beneficiaries and actors – remains illusory. Where better and more holistic metrics are collected, the financial end (i.e. markets) still rewards short-term returns.



HIVOS Knowledge Officer Remko Berkhout addresses the room



Pieter Oostlander explains the value propositions and decision making for impact investing

Players, Divisions and Disconnects

There are many philanthropic approaches to problem solving. Old, new, and emerging forms of organized philanthropy include funds (personal, crowd-funded, venture, corporate, and “traditional” private foundations), program-related investments, and community development. This diversification stems from a belief that philanthropy can innovatively create a climate for change and needs multiple vehicles to support public good. These models’ differing characteristics show there are varied beliefs in the level of change required and what can bring about change most effectively, sustainably and/or equitably.

Some of the more popular approaches to funding social causes blend social and financial impact and use market-based mechanisms to achieve change. These include impact investing, social impact bonds, venture philanthropy, public-private-partnerships, pay-for-success and social enterprise models, which continue to proliferate although their long-term impact and transformative effects are as yet unproven. There is concern that these methods prioritize projects and programs that demonstrate short-term impact and undervalue areas that require longer investment horizons. These methods may also further validate systems and structures that, by some perspectives, remain fundamentally unfair and unjust. For social justice advocates and activists, the marketization of the social sector may reduce important forms of innovation in democratic distribution and decision-making models, and make organizations risk adverse for fear of failure within the marketplace.

Conversely, advocates of market-based approaches see their work as a way to rapidly increase innovation that targets longstanding problems within the social sector. Their results-oriented approach allows for clear assessments and learning for scale. Like markets, good transformational activities should be rewarded and outmoded ones discarded, but there must be space for assessing success of social change activities within its own context.

No Single Value Proposition

Each philanthropic approach is demonstrative of a unique value proposition – a different way to solve a problem – and this diversity and innovation is healthy for the sector. However, funding for social justice and human rights – activities that, by their nature, demand transformative approaches – remain only a small percentage of donor giving. For example, in 2010 1.2 billion USD was provided for international human rights compared to the 45.9 billion USD of total giving that year by US foundations alone. Of greater concern, however, is the seemingly natural tilt towards imbalance. Even when more money is added to a cause, the funding is generally not available for fundamental systemic change – the phenomenon of “starving the roots.”

Participants pushed to move beyond platitudes and acknowledge the benefits of the range of approaches. It is difficult for some to see market-oriented or market-inspired philanthropy as transformative as it seldom goes beyond using current systems to better a particular condition. Conversely, many new (and some old) philanthropists are using the discipline of market-based approaches to create sustainable change. After all, current systems are not going away and it is best to use them to better particular conditions. The question about whether it is possible to change something of which you are part, let alone benefitting from, was left to debate.

How Decisions Are Made

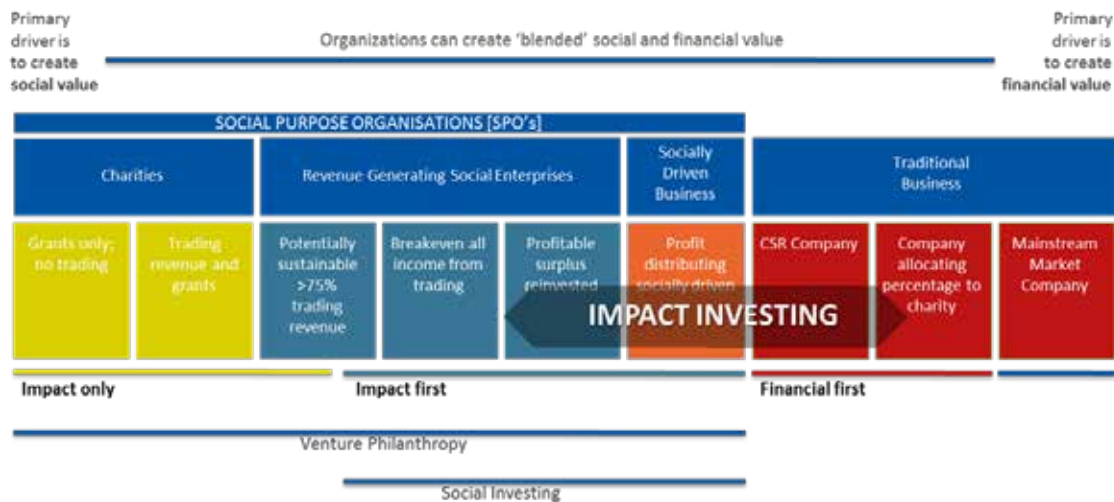
The proliferation of some types of philanthropic activities compared to others and the subsequent polarization among approaches may be the result of certain decision-making processes of funders. There may be rules embedded in how one chooses their preferred programming method. For some donors, especially those in impact investing, their value proposition is to support activities that create social value while generating financial returns and their decision-making paradigm reflects their values. This is not in competition with social change and transformation; that is not their purview.

Clearly each philanthropic approach fills a need and philanthropists welcome transformation, regardless of how it occurs. However, to ensure more balance within the system, philanthropic decision makers can examine their processes and assess if they are geared towards transformative programming. Also, advocates for social change and transformation must understand these motivations and target their messaging, whether from old or new entrants, so that there is a funding stream to adequately support their activities.



Tope Fajingbesi leads discussions in her group

Box 2: Value Propositions and Decision Making for Impact Investment



From Presentation by Pieter Oostlander, Board Chair, European Venture Philanthropy Association

Why A New Approach

Bringing about effective funding for transformation is a challenge. Different methods and goals require different funding models. However, if these methods can be considered as part of a larger system, one may decipher how they can work together for a particular purpose. Ideally, funding streams would further diversify and support activities at different levels and not converge to narrow sets of activities and strategies.

What makes it difficult to receive appropriate funds for transformation and realize returns on investments is the multiplicity of characteristics that make up a transformation process: multiple methods (in chorus, in parallel, on multiple planes, and/or multiple timeframes), distinct content and context, inexact triggers of success, and activities that may not be scalable (i.e. replicable in other circumstances). Examples highlighted by participants were the civil rights movement in the USA and women's rights movements globally. These movements seek to shift power dynamics and therefore require multiple strategies to have a transformative effect at multiple levels. They do not operate on predictable timelines, nor are the most important interventions and

investments always clear at the onset. Consequentially, considerable trust and shared values are required along with responsive funding systems.

As business thinking influences more donors and fund managers this challenge will be exacerbated. Yet, it is not the only struggle. Not all donors seek transformation as many invest in initiatives that aim for better results from current systems. As one participant said, “Many of those with wealth are unaware of the deeper problems with current systems; they were able to succeed, despite [explicit or implicit] barriers faced, and find it difficult to accept that the system significantly favors certain groups and marginalizes others. Their vision of change is not your vision of change.” Knowledge of, and innovative responses to, the most pressing social challenges are seldom in the boardroom at the same time.

The women’s movement demonstrates many of these current challenges. There is heightened interest in supporting women and girls – from philanthropy, aid, development, and business communities – and increased funding is directed toward women’s and girls’ development. However, research by AWID (Association for Women’s Rights in Development) indicates that approximately 75% of new money directed to and for women goes to economic livelihoods, education and health, with only 25% is allocated for leadership and empowerment for women’s rights. Although integral to the efficacy of other types of programming, the women’s rights movements can



Emmett Carson



Angelika Arutyunova presents AWID's research

be difficult to quantify. Therefore, current properties and rules that accompany new funding may not match transformative activities. While increased support for and attention to women and girls is welcome, the way funding is disseminated and distributed raises challenges. As AWID research indicates, there is considerable emphasis on individual versus collective action and, of greater concern: women's rights organizations are simply not on the radar of most of these new donors. The result is effectively "watering the leaves while starving the roots," where inequalities, cultural norms and practices remain largely unchallenged.

It is not enough to claim transformation, not improvement, is the solution. Advocates for transformation must be prepared to argue for their ideas in the public marketplace and competitively challenge other perspectives. They must also reconcile that, although there is disagreement on what types of activity lead to transformation, this diversity and clash of perspectives strengthens the movement's chances of survival and emboldens its prospects of bringing about change. For example, market-based innovations may influence how mainstream markets operate and could, arguably, transform financial systems. More mainstream companies could (re)register as benefit corporations if legal hurdles were removed, changing norms towards clear incorporation of social, environmental and financial benefits in decision making. Also, a number of foundations are trying to create a social marketplace – providing metrics and indicators to help investors identify strong performers and use that to guide their investment decisions.

Building a New Funding Ecosystem

Participants analyzed and deconstructed the philanthropic system, considering the role and flow of money within and exogenous to the system, and, using Michael Edwards' framing and case studies, applied systems thinking to articulate a "prototype philanthropic ecosystem" that supports social change and fosters transformation. Participants also conducted a preliminary mapping of "eco-plexity" and how to move toward transformation.

Tools for Social Transformation

New tools and approaches that harness public or market systems to support social and environmental outcomes are being tested. These include vehicles like impact investments, social impact bonds, pay-for-success models, and new forms of public-private partnerships. While there is considerable enthusiasm for these vehicles, there remain doubts about their ability to move beyond incremental improvements. There are some concerns that they further validate systems and structures that are still fundamentally unfair and unjust, and encourage approaches that expect monetary returns on investment.

At the same time, many would argue that unless the market can be leveraged, large-scale change and fundamental transformation will never be possible. Public and market mechanisms command resources large enough to remake systems, enable scale, and spread innovations in a sustained manner. Philanthropic and development funding are tangential – interesting as an experimental space – and will remain so if antithetical to mainstream systems. Social justice can rail against the powers that be but will not prevail against them. This marks a fundamental challenge within the sector: when seeking transformation, how can philanthropy reconcile the need for public and private channels for scale with their inherent difficulties in being transformative?

The question of scale also arises in other areas where micro behaviors lead to macro problems. For example, analysis of international development flows reveals that as much as 60% of aid provided to developing economies exits in illicit forms and (legal) tax avoidance. If there were a desire for transformation at this level, philanthropy would have to reach beyond its purview and use the means of other systems to have impact. Therefore, the philanthropic ecosystem must be more directly engaged with other systems. This, of course, requires changes in how institutions work together and a willingness to call attention to these practices.

Box 3: Estimates of Illicit Financial Flows from Developing Countries

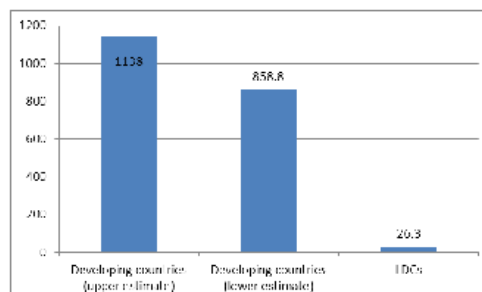
Estimates of illicit financial flows from developing countries (US\$ billions, 2010)



Some countries also experience significant levels of capital flight

Illicit financial flows – and broader tax reform - have recently become a topic of high-level policy discussion, not least due to budgetary constraints in developed countries

Some estimates suggest that for every US\$1 received in aid US\$ 0.6 flows back out (GFI)



Source: Author's elaboration based on UNDP and GFI data, 2011 and 2013

From Presentation by Gail Hurley, Policy Specialist, Development Finance and Inclusive Globalization, UNDP



UNDP Policy Specialist Gail Hurley

Philanthropy's Role During Change

Social transformation is like a revolution, where long-term activism and civil discourse coalesce with immediate civil unrest and people power to fundamentally change systems. Yet, is philanthropy prepared to not only be catalytic but supportive in times of transformation? The program presented a case study on foundations operating in the Middle East and North Africa post the "Arab Spring," which highlighted many difficulties foundations confront when working to support authentic large-scale social change.

When engaged, donors had different values and, even during transformative events, had very different expectations of returns on investment. Local activists' requests and knowledge of (il)legitimate systems were often ignored and, consequentially, results were mixed. Although local actors welcomed philanthropic intentions, local activists needed collaborative partners that invested in their values and activities that worked towards those values. After all, transformation was unpredictable and did not match with time-bound deliverables or established alliances. They needed trust – along with flexibility in funds and independence in operations – to achieve their goals using appropriate systems.

Box 4: Opportunities for Philanthropy in Times of Crisis

In transition and crisis situations, there are new challenges and opportunities that need to be better understood along with their implications for practice. The growth of the 24-hour news cycle and social media has led to radical democratization, transparency and real-time decision-making. Movements appear to be leaderless with little opportunity for sensitization. It is possible to create new public conversations and advocacy campaigns almost instantaneously. While these characteristics are shown in sharpest relief in transition settings, they can be applied in all areas of social change and transformation.

Philanthropic actors can bring crucial benefits, but with each potential benefit there is a balance to be considered. For example, for regions in political transition, participants noted that independent/private foundations and other philanthropic actors, can:

- Bring flexibility and the ability to modify course quickly, but also need to be prepared to stay the course and engage for the long term;
- Highlight sensitive justice and rights issues that may otherwise be overlooked or marginalized in times of crisis, but also must be culturally sensitive and frame issues in relevant ways;
- Be politically neutral and help negotiate between contentious factions, but need to clarify and holdfast to the values they represent;
- Focus on difficult problems of good governance, policy change, and other long-term change processes, but must ensure they engage local actors and build support to not impose exogenous norms; and
- Bring to bear relevant experience and expertise, but need to develop local capacity, not rely solely on external expertise.

Consequently, it is not too simple to ask: “Should there be a sunny-day fund [responsive funding for the change we want to see]?”

Salzburg Global Seminar Session 499 *Philanthropy in Times of Crisis and Transition: Catalyzing Forces of Change*



Naila Farouky with Fellows during group discussions

Working on Wicked Problems

Transformation is complex. This is especially true for “wicked problems” which are defined by incomplete and contradictory information, as well as parameters that are difficult to recognize and defy singular solutions. However, this is philanthropy’s forte. Trying to address these problems within current systems is difficult; it is not possible to cleanly isolate elements and identify the means to fix the problem.

Box 5: What are Wicked Problems?

- No definitive formulation
- Essentially unique
- Multiplicity of possible solutions
- No immediate and no ultimate test of a solution
- Every solution is a “one-shot operation”; there is no opportunity to learn by trial and error
- No well-described set of permissible operations
- that may be incorporated into the plan
- Practitioners are liable for externalities of solutions
- Not fully understood until after the formulation of a solution
- Can be considered to be a symptom of another problem

Horst W. J. Rittel and Melvin M. Webber. *Dilemmas in a General Theory of Planning*. Policy Sciences 4 (1973), 155-169



Gayle Peterson presents on systems thinking and deliberate leadership

However, complexity should not result in paralysis. Due to the interconnected nature of wicked problems, actors may apply systems and network analysis to better identify entry and leverage points. Understanding how a system operates, how its components interact, and what “rules” govern it, can elucidate opportunities where relatively modest interventions create a cycle of change and benefits spread across a system towards a transformative effect.

Systems Thinking

A systems approach aligns well with philanthropy. Philanthropic actors are diverse, co-integrated and, many times, explicitly interconnected. As such, it is important to understand the limits of any actor addressing transformation on their own. Philanthropic actors are better served by considering themselves within a systems framework that has multiple components interacting and serving different purposes. This means consideration of philanthropy’s primary vision, its components, how components interact towards the vision, how the vision is influenced by internal and external feedback, and how components self-correct due to that feedback. This is a continual process that questions who is being left out or being (further) marginalized in current processes and approaches. Part of this self-correction is the current call for a funding system that ensures transformation activities are resourced appropriately.

Yet is a systems approach – a balance in diversity, infusion of feedback from internal and external forces, and ability to self-correct – realistic? It should be. A systems view of problem solving is not new in the philanthropic sector. For example, program participants felt that characteristics of a transformational philanthropy ecosystem were:

- Takes considered risk;
- Expands understanding and application of resources beyond money;
- Listens, learns from, and approaches partners as equals;
- Respects different opinions, while articulating one’s own values;
- Remains flexible and adaptive;
- Shares (operational) decision-making power and avoids hierarchical traps;
- Seeks to rebalance power relations by engaging in and supporting participatory processes;
- Focuses on accountability, collaboration, and trust-building and aligns incentives;

- Acknowledges that there are multiple paths, but seeks to align activities toward common goals;
- Distinguishes and supports those doing valuable work;
- Focuses on equity and empathy;
- Is alert for unintended outcomes; and
- Engages other key actors including multilaterals the aid community, investors and individuals.

However, the assembly of this list tells us that philanthropy's theory in use is likely very different from its espoused theory. Ideally, there should be congruence between one's espoused theory and theory in use. Thus, ecosystem thinking is not a radical approach to philanthropic funding but rather a well-defined theory for reducing the gap between words and actions.

Applying a Systems Approach

One of the most important benefits of employing systems thinking is being able to routinely identify potential links to other key actors and to consider impacts on the system beyond the specific point of intervention.

The UN Human Security Framework provides a strong prototype for addressing wicked problems. This form of system and network analysis uses top-down norms, processes and institutions with a bottom-up focus; incorporates a diverse range of actors; adopts flexible and issue-specific approaches; and operates at local, national and/or international levels. It can help decision makers analyze how complex factors interact and effect vulnerable populations. It can also facilitate more comprehensive stakeholder system mapping. This in turn can enable the identification of multiple partners and actors that may not have factored into a donor's strategy. It also helps a donor to see where they fit within the broader network of relevant stakeholders. The information gleaned through the process can craft a stronger "theory in use" for transformation – what actions can be taken to achieve systemic change. This mapping and analysis may also better identify potential unintended consequences – both positive and negative. For example, Lamisi's Human Security Framework (Box 6) identifies significant stakeholders that affect her life in her community.

Box 6: Systems Mapping – Lamisi’s Human Security

POTENTIAL PARTNERS

Scan stakeholders



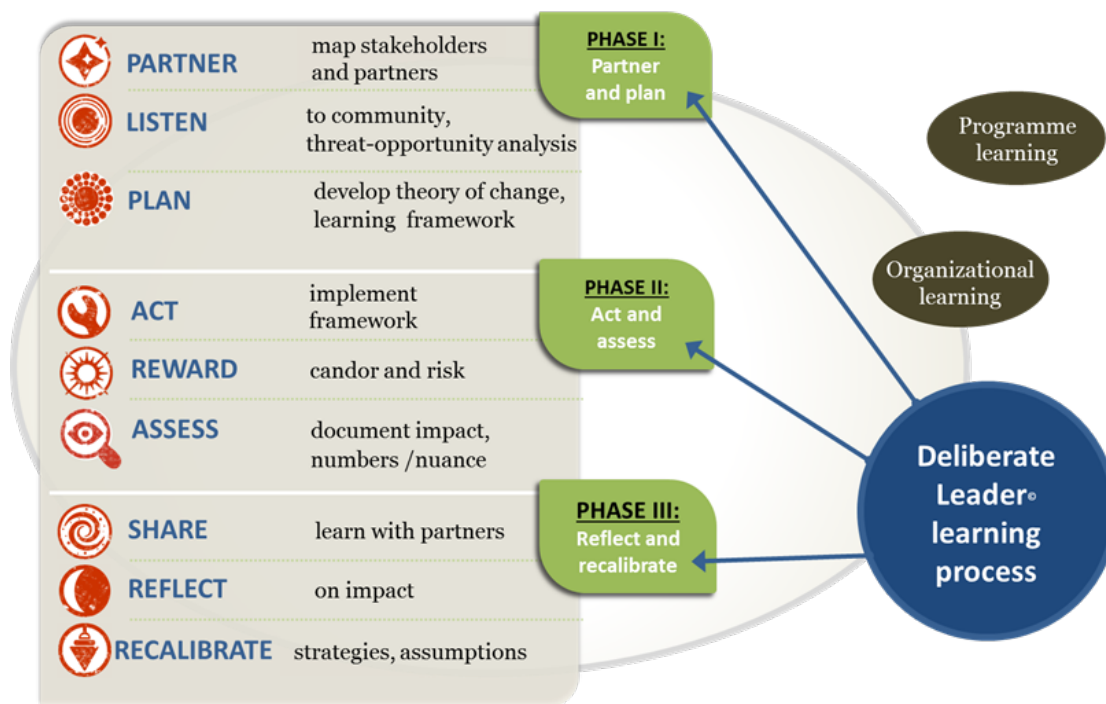
EXAMPLE OF COMPLEX SYSTEMS CHANGE

From Presentation by Gayle Peterson, Associate Fellow, Said Business School, Oxford University

Even for this micro system, complexity is immediately evident in the number of actors, their connections, what governs their interactions, and how these interactions impact the primary beneficiary and the system.

Deciphering complicated moral, political, and strategic considerations involved in a very basic change process is critical in systems approaches. Systems mapping and analysis also identify areas of leverage – points at which interventions may create system-wide impact. Merging multiple maps as one goes from micro to macro can provide empirical feedback on the macro level and allow space for external feedback and self-correction.

Box 7: Deliberate Leadership: Choices and Process



Choices:

- Courage: What is the wicked problem?
- Collaboration: Who can help? Who are allies?
- Community: What is needed? What is succeeding? What can be scaled?
- Candor: What is working? What is not? How can I recalibrate?
- Creativity: How am I testing innovative scenarios?
- Compassion: How am I being emphatic – not egotist?
- Capital: How am I tapping my social, environmental, and financial capital?

From Presentation by Gayle Peterson, Associate Fellow, Said Business School, Oxford University

However, mapping is a preliminary step; decisions made, based on their criteria, and monitoring and follow-up on impact and externalities, are vital elements in systems change. An important attribute for this process is exercising deliberate leadership in decision-making, as there is no “checklist” or handbook for dealing with wicked problems. Deliberately creative, collaborative, compassionate, and courageous leadership is essential.

Box 8: Thinking, Methods and Activities for Transformation

If choosing to address wicked problems, decision-making activities must be geared towards supporting thinking, methods, and activities for transformation.

As such philanthropists may assess their work and examine:

- What is the transformation being sought?
- What activities can result in the transformation sought?
- What activities are preferred?
 - Why are these activities preferred?
 - Did these activities result in transformation sought?
 - If not, comparing preferred activities and activities that result in transformation, is there disproportionate support of activities that do not result in transformation?
 - If so, can preferential aspects of preferred activities be proxied in or adopted by activities that result in transformation?
 - If so, can funding systems be altered to achieve a preference (in activities funded and their results) towards transformation?

The Funding Ecosystem

Philanthropic behavior during times of crisis and transition further elucidate that funding systems for social and financial transformation are out of balance; there is too much emphasis on value for money rather than investing in values with money. While there may be substantial funds in philanthropy, with over 298.3 billion USD of charitable giving within the USA in 2011 (of which 49 billion USD came from US foundations) and 53 billion USD flowing from the OECD to developing countries in 2008, it remains difficult to get funding for transformative processes. The democratic and diffuse nature of these processes makes them less appealing to data-driven decision making. Even during transformation, market-based approaches are proposed as “investments” into change processes. Alternatively, grantees do not feel able to turn down funding or counter donor demands that do not fit frontline needs.



Fellows during group work discussions

By taking a systems perspective, it should be possible to better understand the value of multiple approaches within philanthropic funding and why some methods of funding are better suited to complex challenges. The funding landscape is varied and mature enough to support critical social challenges. However, the rules placed on those funds must differ.

Ecosystem analogies – a community interacting as a system – provided a more tangible narrative for systems thinking and allowed participants to view the landscape from a different vantage point. This further revealed certain biases and unwritten rules that govern their work.

Conceptual Models of Funding Ecosystems

Michael Edwards notes that certain forms of activities – cultural institutions, essential academic and scientific research, and social justice issues such as human rights – are ignored and/or under-resourced, leaving many critical social challenges similarly ignored and under-resourced. Therefore a funding ecosystem should not only foster balance but also self-correct when required. During the program, participants sought to define an ecosystem that would support transformation, through theoretical models and practical application.

Participants agreed that using an ecosystem framework emphasized roles, rules, decisions, and interactions from multiple perspectives. However, identifying core elements of a healthier system, one capable

of transformation, was much more challenging. Consequently, resulting ecosystem models were distinct and varied. Some showed that there is no workable ecosystem approach because there is not a single purpose. Philanthropists work towards different, distinct, and sometimes conflicting goals. Yet others showed the ecosystem model was fitting by considering the natural ecosystem where different species' functions may complement and/or compete for survival. In this scenario, different resource streams (i.e. inputs in this model) should work together and be in balance for different organisms to thrive, with each requiring different types and levels of inputs. The model considered the actions of other systems and tools (e.g. private and public sectors, policy and legislation) as native to or invasive towards achieving transformation. As a framework, it clarified how elements of the system could work together.

In another scenario, participants likened philanthropic funding to a sensory-obstructed octopus in which each arm acts independently and is not feeding information back to its brain. It has the power to obscure its surroundings and can be ruthless, even deadly, but is not moving with purpose. However, if the obstruction is removed, a new, interdependent way of functioning is absorbed into its core and the octopus can coordinate its arms and apply its considerable intelligence and skills to advance the public good. It remains a small creature in a larger system, but is able to have more effect on its surrounding than its size would otherwise suggest – an analogy many felt apt for philanthropy.

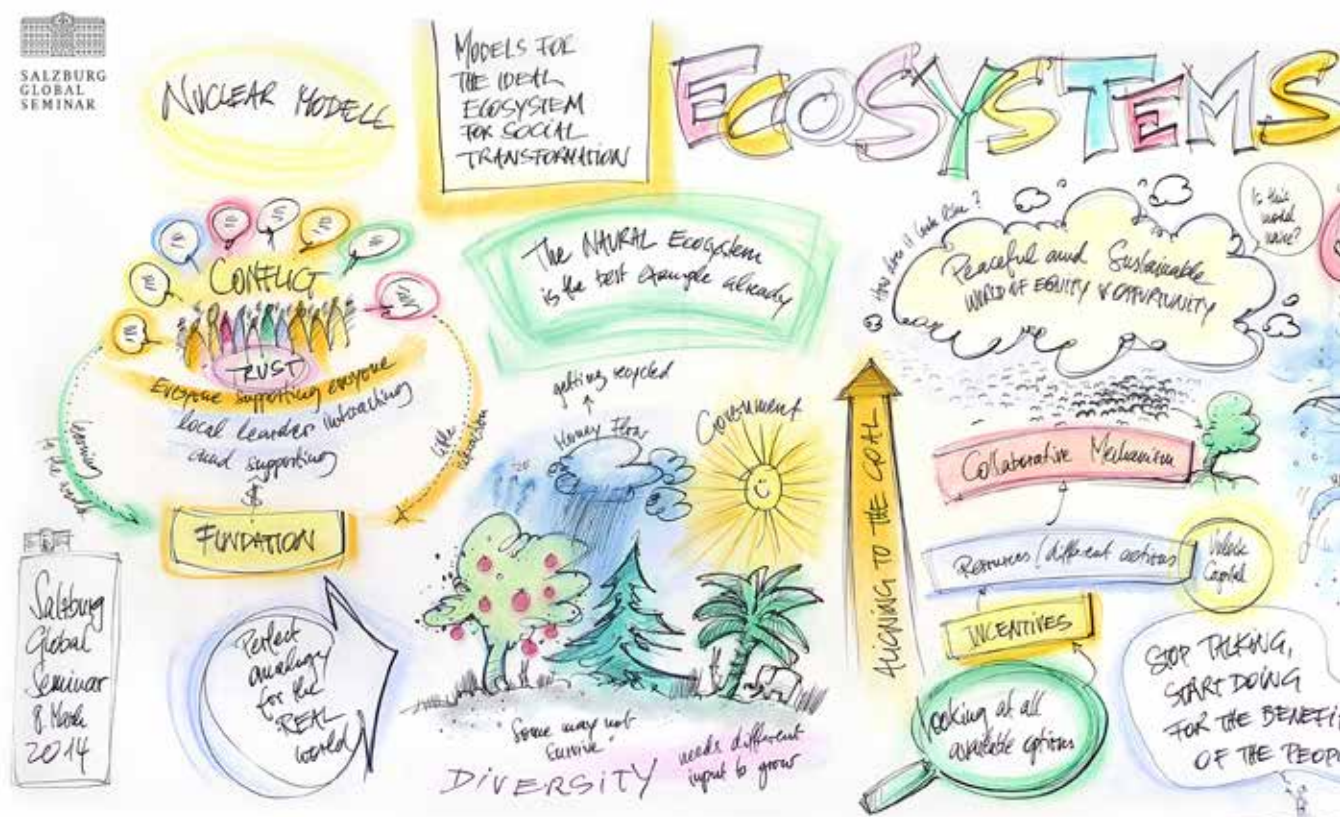


Martha Buell presents her group's ecosystem model

Box 9: Funding Ecosystems from Program Working Groups

Each group described an idealized philanthropic ecosystem to support transformation and a graphic facilitator captured the descriptions and created a composite drawing. While groups had the same instruction, each created a different description, highlighting different elements, which included:

- In the beginning identifying the need to build on a foundation of trust among the actors;
- Moving to the natural world as representative with too little or too much of any element as potentially harmful;
- Then an attempt to align elements in a more structural format – arguably trying to “tame” nature;
- The octopus invigorated the overall picture, demonstrating its ability to be beauty and/or beast;
- There are also aspects of non-agreement, those that do not see a functioning model to agree upon – an unusual moment of “truth telling”;
- There is a need to agree on a basic set of values, even if one cannot name them immediately; and
- A reminder to circle back to the people at the heart of change – and to remember to “stop talking and start doing”.



The final composite illustration of the ecosystems of philanthropy as envisioned by the participants of Session 530

Box 10: The Case of Liberty and Justice

Liberty & Justice, Africa's leading Fair Trade Certified™ apparel manufacturing company, began its operations in 2010, purposefully targeting women to join its worker-owned corporation (at 49%). The program incorporated manufacturing training, financial literacy and communications skills; these encouraged workers to effectively and openly communicate with management and each other, call out problems, and suggest improvements. The corporate culture centered around one word: love, and it promoted genuine interest in the wellbeing of others. The program also surveyed its workers to understand their needs at work.

During the first week of operations, a worker came in to request that her name and status be changed on her employment record and bank account. She was getting a divorce. Her husband did not like her daughter from a previous marriage so she was leaving with her daughter.

Initially seen as an isolated incident, in time over a quarter of the women manufacturing staff eventually got divorced. The most dramatic case was Marianna who later became Rebecca. She was married to and followed the ways of a devout Muslim. At 45 years of age, she decided that it was not the life for her, asserted her will for the first time, and left her husband.

The formal work structure and stable salary gave the women a livelihood and sense of purpose. Many invested their salaries in micro and small enterprises that brought significant returns. However, it was the training, a place for, and a process that sponsored self-expression that provided the empowerment needed to transform their personal and professional lives into what they envisaged.

This was far from deliberate. The factory centered on the economic benefits it provides to its workers. The communication training and corporate atmosphere was a means towards that, by fostering a work environment for better operations and production results.

Now that this has been observed and there is technical and financial support for the process, employees' support systems and networks are being analyzed and measured. Along with the number of children within the household that attend school, level of access to medical care, level of savings and living standards, workforce surveys also ask questions about the impact of employment on social and familial structures, and engage husbands and children in the process.

When this program began, it was about the economics, but empowerment and justice is truly now at the forefront.

From a conversation with Chidegar Liberty, CEO, Liberty & Justice, Inc.



Chidegar Liberty

Fundamental Differences

Individual experiential, political, and moral perspectives guided judgments on social and financial transformation and the role of money, values, and power in that process. These points of divergence were part of the program dialogue and formed a foundation for further research, dialogue, and action.

Money remains a flashpoint. If one agrees that its origins are (almost always) entwined with systems that social change activists seek to alter, harnessing it for good is nearly impossible. For others, money is an essential tool for social progress and systems integral to its creation are arguably neutral. The culprits are forms of social injustice that restrict access and participation. Philanthropy should target these injustices and rebalance systems for more positive impacts. As new forms of philanthropy employ methods that democratize funds and directly support set agendas, ideas may become more powerful than money. It may be that the future focus for social change and transformation advocates is therefore their abilities to compete based on their ideas and not on their level of funding.

Another fundamental issue was whether philanthropists are ready to innovate towards transformation. Innovations usher many unknowns and transformation is, in its very nature, uncomfortable. Established

philanthropists still hold systemic legitimacy, as universal values have innate legitimacy (and, by extension, actors supporting those values) but this may change based on new entrants and/or democratic debate in the public sphere. Radical forms of philanthropic giving and doing are emerging. Although systems thinking is absolute, methods and tools for function may drastically change in the next decade. Philanthropy must ready itself by knowing its field beyond silos and supporting (not managing) transformative innovation. However, there was disagreement on philanthropy's vision and its values, not only in funding but also in programming. With such divergence, is it possible for philanthropy to play a constructive and transformative role?

Ultimately, the urgent need for a sustainable planet and basic human security was a point of convergence among participants. As such, this value can shape the function of and identify roles within a philanthropic ecosystem. The diversity of opinions, methods, and objectives on how to build sustainable futures can find a place within that system and strengthen its ability to transform. An example cited before is the Civil Rights Movement in the USA. This movement is united in its purpose of racial equality but there are very different views on its focus, how to accomplish its goal, what activities would be, and what desired outcomes are. The addition and use of multiple perspectives – from local to national forms of civil protest and disobedience to court challenges – increased the movement's traction over the decades and has led to transformation that continues today.



Joaquim Oliveira Mucar and Ben Witjes

Recommendations and Practical Steps for Transformation

Value(s) for Money? Philanthropy as a Catalyst for Social and Financial Transformation was an important step in bringing forward fundamental questions of how social and environmental challenges can be addressed and social change can be funded. The partnership with HIVOS and Salzburg Global enabled a high-level discourse. The program also initiated new debates, which are still in process.

The core theses conveyed in *Beauty and the Beast* can be explored and tested in other global contexts, systems components better dissected, innovative tools further examined, and fissures fully confronted. More time and other opportunities are needed to completely unpack and analyze the assumptions and positions presented. Therefore, room for dialogue to fully grapple with the global philanthropic ecosystem and direct more resources to transformative processes exists. Yet, there were implications for practice.

Implications for Practice

A systems framework is highly relevant and useful for reframing thinking and perspectives, although it may be difficult to link to practice. The logical natural ecosystem analogy was a good starting point. However, the imperative to continue revisiting assumptions and ask challenging questions needs to be balanced with action. Use of such tools as the deliberate leadership model and human security framework (referenced in Boxes 5 and 6) can increase philanthropists' efficacy when supporting social change and transformation. Having different systems models can be useful for identifying leverage points and better understanding where and how actions impact across systems. Different systems models may not lead to radical changes in daily operations but they may alter approaches and collaborations. An

ecosystem framework may also help reveal the patterns and impacts of funding flows. This knowledge and awareness can better equip donors to adjust strategies and actions to counter imbalances.

The relatively modest resources housed in foundations and organized philanthropy compels the field to work across systems. The international development agenda and an agenda for social and financial transformation are not the same but the development sector operates in spaces similar to the philanthropic sector and faces similar challenges. Therefore they must collaborate effectively. Philanthropy, due to its nature, can also better leverage its monetary and moral currency on big levers like policy and legislation.

There is also a need to align and value quantitative and qualitative evaluation measures equally. Contextual evaluation measures are important in the quest to change norms, cultural assumptions and attitudes.

If philanthropy is to be truly risk-taking, cultural changes within the sector are required. As the majority of institutional philanthropic resources are locked in investments, social change proponents must either shift the way these monies are used or look elsewhere. Fortunately, the sector is anything but monolithic; old actors bow out and new actors rush in bringing (substantial) resources. Therefore, making the case for transformation and transformational thinking to new philanthropists, small or large, is even more important.

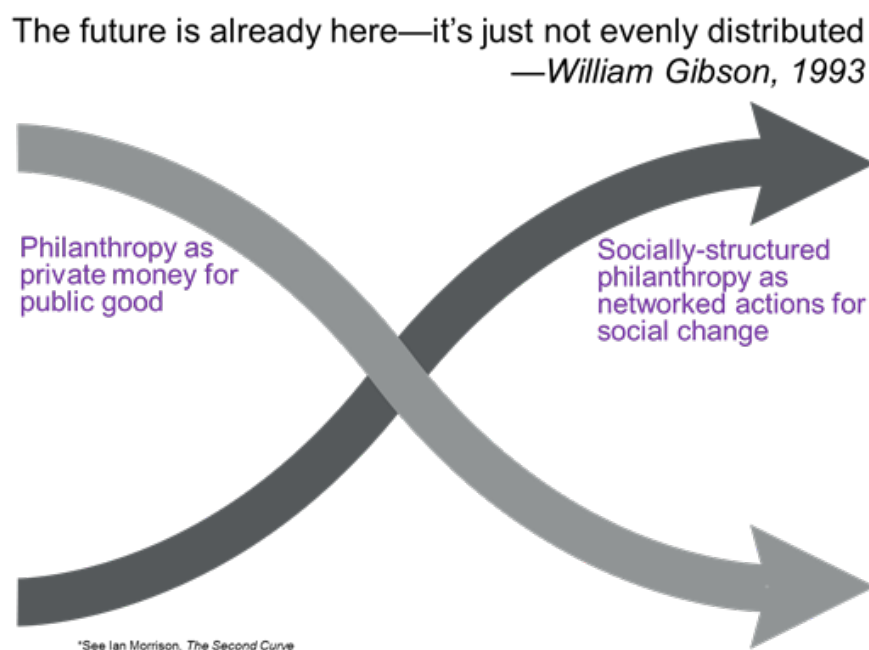


Bettina Warburg

Failure needs to be reframed – from something to be hidden to an opportunity for shared learning. A number of foundations already promote this framework but it is not yet the norm. Reframing failure also requires changes in how the sector is viewed by the broader public. If there is a general impression that donors are not accountable for how they spend their funds, then hearing about failures will not be received positively. A clear articulation of success can change this pattern.

There are important innovations and new trends that, although not explicitly philanthropic, have implications for the sector. Many forms of bottom up philanthropy, such as remittances, are larger than foundation giving but do not receive due attention because they are largely unorganized and difficult to leverage. As demonstrated by crowd-funding, when targeted, these monies have the power to reshape financial flows and the social transformation landscape.

Box 11: Philanthropy Trending



From presentation by Bettina Warburg, Public Foresight Strategist, Institute for the Future

Other changes that require alterations to practice include meta analysis of big data. Due to international philanthropy's complex, varied, and independent nature, it is difficult to gather objective and comparable data, particularly regarding transformation. With the advent of computational tools for large, complex, and high-dimensional data sets, we may be able to objectively view the philanthropic ecosystem and its impact as a whole. Other emerging trends include tools for advocacy, new currencies, and new forms of "ad-hoc-racy" on social movements. These trends also bring about radical transparency and innovations in organizational design that change how people and institutions perceive, use, and react to money and power.

For the foreseeable future, money will continue to matter and philanthropic actors must be particularly savvy and apply funds for maximum impact. One participant viewed institutional philanthropic resources as "a glacier of wealth," with an average 7.4% (22.2% for corporate foundations) (as estimated by the Foundation Center) being applied directly to achieving mission. Yet, these investments are not frozen; they are most often in mainstream markets and are having an impact apart from the social goals of the institution. Another implication for practice, then, is how to shift more money to support the public good and further institutional missions. This circles back to how philanthropic funds are generated and how to articulate the "net impact" of philanthropic investments.



Fellows consider the state of of their ecosystem of philanthropy



Malcolm Lynch, Poh Wah Lee, Michael Chertok and Richard Gomes continue discussions over coffee

Unresolved Questions

Participants felt that a number of critical questions raised during the program should be further explored. It was suggested that the *Beauty and the Beast* hypothesis be tested against alternative philanthropic cultures. One participant suggested commissioning a series of papers on the beauty/beast theme for different regions and contexts that may be dominated by other philanthropic models. These papers could examine how these ecosystem(s) may look, the role of philanthropy (i.e. supportive vs. catalytic) and what levers are relevant for transformation.

It was also suggested that more research be undertaken on noninterest-generating financial systems, models that allow for the circulation of money and resources without the demand of interest being paid, and that operate on more flexible timelines. One could then test the ecosystem hypothesis and assumptions with these additional perspectives. If interest is taken out of the equation, does that fundamentally change the power of money and/or limit its “beastly” effects? Might it limit the good as well?

Despite the considerable growth and diversification of the philanthropic sector, several participants questioned whether anything is fundamentally changing and, if not, what can bring about change? Essentially, what can enable philanthropic money to “water the roots”

not just the leaves, thereby directing more resources to transformative processes? It was suggested that the answer remains unclear and requires further investigation.



Federico Bonaglia

Next Steps

Value(s) for Money? was designed to expand and deepen the conversation on current and future funding trends and global policies. It was a step in getting many of the hard questions on the table and invigorating a critical debate that remains in progress.

The forum allowed diverse perspectives to surface, including the different values that guide and shape individual and institutional choices related to money and transformation. These need to be acknowledged and better understood for philanthropy – and the money it controls – to be a catalyst for transformation. Points of divergence during the program form a foundation for further research, dialogue and action. These include examination of the origin of funds, expressions of value in funding and programming, how to innovate towards value, and ecosystem thinking in practice. Salzburg Global and HIVOS will continue to support the debate and bring additional voices to the table as work is needed to map the true funding landscape and locate gaps and fault lines by issue, sector and/or region. For global philanthropy, there is the immediate step to apply transformational and systems thinking to its interactions with and support of the

2015 Sustainable Development Goals (SDGs). Incorporating national consultations in 88 countries, 11 thematic consultations on governance, education, health, peace and security, and inequalities, and furthermore 1.5 million people voting in its survey, the SDGs will have similar (if not stronger) legitimacy to the MDGs and act as a rallying point for global values. Philanthropy may leverage its position to innovate towards those values and work with other systems for better function, transformation, and scale.

The OECD Global Network of Foundations Working for Development has led the development of voluntary and non-binding Guidelines for Effective Philanthropic Engagement (GEPEs). These guidelines foster mutual recognition between philanthropic actors and governments on the basis of philanthropy's value add, as well as to frame how best to work together through dialogue, data and knowledge sharing, and partnerships. The guidelines should also increase general understanding of the comparative advantages of foundations as development actors, strengthen and formalize global philanthropic governance and partnerships with governments and other stakeholders, and contribute to an enabling environment for effective development collaboration.



Karolina Mzyk of the UNDP and Federico Bonaglia of the OECD Development Centre presented the GEPEs to the participants

Appendix I

Terms and Definitions

Ecosystem	Component parts, acting interdependently as a system for a purpose. It may be influenced by internal and external forces and is also selfregulating and self-correcting through feedback from said forces.
Funding Ecosystem	Ecosystem of component parts that are key in funding and implementation for social change. Such ecosystem may show insight on funding for social change and may include democratic (mechanisms created by a group of people to serve their interests), commercial (market driven), and institutional (standing reserves within organizations) funding mechanisms.
Philanthropy	Private initiatives, for public good, focusing on quality of life. Philanthropy and its services contrasts with business (private initiatives for private good, focusing on material prosperity) and government (public initiatives for public good, focusing on law and order).
Scaling	Spreading of ideas, learning, processes and/or products; usually in terms of replicating, adapting and/or expanding innovations in a sustainable manner.
Social Change	Social change refers to an alteration in the social order of a society. Social change may include changes in nature, social institutions, social behaviors, or social relations. Social change may be driven by cultural, religious, economic, scientific or technological forces. May include components such as contributions to the common good, new institutions delivering on outcomes and exemplifying more egalitarian patterns of ownership and reward, policies that incentivize healthier forms of production and consumption, political and social activism that propel change, and personal change.

Social Economy	The social economy examines activity that is related to economics amongst the community and exposes the information to the community, this includes the social enterprise and voluntary sectors. A social economy develops because of a need for new solutions for issues (social, economic or environmental) and to satisfy needs, which have been ignored (or inadequately fulfilled) by the private or public sectors. By using solutions to achieve not-for-profit aims, a social economy has a unique role in creating a strong, sustainable, prosperous, and inclusive society. Defining the limits of a social economy sector is difficult due to shifting politics and economics; at any time organizations may be “partly in, partly out”, moving among sub-sectors of the social economy.
Social Transformation	Fundamental shift in the structures of self and society that underpin the “delivery mechanisms” of social change like laws, policies and services, and the institutions of government and the market.
System	A complex collection and/or interaction among component parts, preferable to reach a purposed goal or vision. These are exemplified by what they are, what they do, their structure and properties, and their behavior and methods due to interaction among their component parts.
System Change	A shift in the way a community makes decisions about policies, programs, and the allocation of its resources — and, ultimately, in the way it delivers services to its stakeholders. May include shifting system components and/or their sequence, shifting interactions between components, altering the “whole” through shifts in underlying choices, rules and resources, and shifting the manner in which the system provides feedback to itself.
Value Proposition	Usually part of a business strategy, it is the promise of value to be delivered and acknowledged. It can apply to the entire organization, or parts thereof, or programs, or products or services.

Appendix II

Program

Day 1 – Thursday, 6 March

Business Case for Change

12:30 Lunch

16:00 Welcome and Opening Remarks

Clare Shine, Vice-President and Chief Program Officer,
Salzburg Global

Ben Witjes, Director of Program Projects, HIVOS
International

16:10 Program Overview and Goals

Session goals, expectations, and agenda overview

Remko Berkhout, Knowledge Officer, HIVOS International
Diasmer Panna Bloë, Program Director, Salzburg Global

16:40 Introductions

Where you engage with the funding ecosystem

17:40 Business Case for Change: Comparative
Views

Why we should act differently

Emmett Carson, CEO and President, Silicon Valley
Community Foundation

Angelika Arutyunova, Manager, Association for Women's
Rights in Development

18:30 Closing

*Synthesis, key questions and points of divergence,
thoughts for tomorrow*

19:30 Dinner

21:00 Classical Concert

Day 2 – Friday, 7 March

Deconstructing and Transforming for Results

9:00 Program Check-In

*Review of previous day's key points, preview day
ahead*

9:15 Deconstructing the Funding Ecosystem

*Current practice within sectors, looking at
motivations, gaps and challenges, how results are
measured and integrated for long-term change*

Pieter Oostlander, Board Chair, European Venture
Philanthropy Association

Richard Gomes, Head of Global Policy and Advocacy,
Shell Foundation

Edmund Cain, Vice President, Grant Programs,
Conrad N. Hilton Foundation

Joaquim Oliveira, Executive Director, Magariro

10:15 Financial Flows, Enabling Environments and
Results

*Policy environments, domestic resources, funding
flows and measured results*

Gail Hurley, Policy Specialist: Development Finance &
Inclusive Globalization, UNDP

11:35 New Frontiers in Philanthropy

Bettina Warburg, Research Manager, Institute for the Future

12:05 Knowledge Café on funding models and
their effectiveness in achieving transformation

*Case studies on democratic-, commercially-,
institutional- and hybrid-funded transformative
projects*

Atallah Kuttub, Chairman and Founder, SAANED

Ebba Augustin, CEO, SAANED

13:15 Lunch

14:45 Plenary Session

Reporting from Knowledge Café, synthesis, key questions and points of divergence

15:15 Conceptual Model(s) of Healthy Funding Ecosystem

Funding transformation and change and formulating systems for results

Michael Edwards, Distinguished Senior Fellow, Demos
Panel Discussion on Systems

Federico Bognalia, Head of Division, Policy Dialogue,
Network of Foundations Working for Development, OECD

Mari Kuraishi, Co-Founder and President, GlobalGiving

Chid Liberty, Founder, Liberty and Justice

Facilitated by **Heather Grady**, Former Vice President of
Foundation Initiatives, Rockefeller Foundation

16:45 Group Experiments – Formulating Systems for Results

Using previous case studies as a source, create philanthropic ecosystem(s) for social transformation

17:45 Plenary – Discussion of Results
Presentation of models by groups

18.15 Closing

Synthesis and thoughts for tomorrow

18.30 Consultations on the Guidelines for Effective Philanthropic Engagement (optional)
Informal discussion on requirements to promote collaboration between foundations and other development stakeholders, including governments

19:30 Dinner

Day 3 – Saturday, 8 March

Galvanizing for Action

9:00 Check-In Activity

Review of previous days' key points, preview day ahead. What have we missed? What perspectives are lacking?

9:00 Deliberate Leadership and System Change
Gayle Peterson, Partners for Change, Said Business School, Oxford University

10:00 Complete Group Reporting
Graphic Facilitator Drawing

Wolfgang Irber, Illustrator

Time for Reflection

12:30 Lunch

13:30 Reporting From Reflection

15:00 Getting our Findings Heard
How and where should program outcomes best be shared?

15:15 Organizers' Response

Remko Berkhout, Knowledge Officer, HIVOS International
Diasmer Panna Bloer, Program Director, Salzburg Global

15:30 Closing
Time for continued discussions, networking and partnership building

19:30 Reception

20:00 Banquet Dinner

Appendix III

Session Participants

All positions correct at time of session (March 2014)

Angelika Arutyunova,
Program Manager, Association
for Women's Rights in
Development, Toronto, Canada

Ebba Augustin,
CEO, SAANED for Philanthropy
Advisory in the Arab Region,
Amman, Jordan

Tamsyn Barton,
Director General, European
Investment Bank, Luxembourg,
Luxembourg

Remko Berkhout,
Knowledge Officer, HIVOS, The
Hague, Netherlands

Diasmer Bloer
Program Director,
Salzburg Global Seminar,
Salzburg, Austria

Federico Bonaglia,
Head and Deputy Director,
OECD, Paris, France

Martha Buell,
Director, University of
Delaware, Newark, USA

Edmund Cain,
Vice President, Grants Program,
Hilton Foundation, Agoura
Hills, USA

Emmett Carson,
CEO and President, Silicon
Valley Community Foundation,
Mountain View, USA

Maria Chertok,
Director, Charities Aid
Foundation, Moscow, Russia

Michael Chertok,
Board Member, Digital Divide
Data, San Francisco, USA

Karen Colvard,
Program Director, The Harry
Frank Guggenheim Foundation,
New York, USA

Emilienne De Léon,
Executive Director,
International Network of
Women's Funds (INWF), México
Distrito Federal, Mexico

Michael Edwards,
Distinguished Senior Fellow,
Demos, Swan Lake, USA

David Emerson,
Chief Executive, Association
of Charitable Foundations,
London, United Kingdom

Temitope Fajingbesi,
Co-Founder & Coordinating
Trustee, United For Kids
Foundation, Hanover, USA

Naila Farouky,
CEO & Executive Director, Arab
Foundations Forum, Amman,
Jordan

Neville Gabriel,
Executive Director, Southern
Africa Trust, Johannesburg,
South Africa

Benjamin Glahn
European Development Director,
Salzburg Global Seminar,
Salzburg, Austria

Richard Gomes,
Head of Policy and Advocacy,
Shell Foundation, London,
United Kingdom

Heather Grady,
Advisor, The Conrad N.Hilton
Foundation and The B Team,
New York, USA

John Harvey
Freelance Philanthropy Advisor,
Washington, DC, USA

Gail Hurley,
Policy Specialist: Development
Finance & Inclusive, UNDP, New
York, USA

Barbara Ibrahim,
Director, American University
of Cairo, Maadi, Egypt

Mari Kuraishi,
Co-Founder and President,
GlobalGiving Foundation,
Washington, USA

Atallah Kuttub,
Chairman, SAANED for
Philanthropy Advisory in the
Arab Region, Amman, Jordan

Poh Wah Lee,
CEO, Lien Foundation,
Singapore, Singapore

Chidegar Liberty,
CEO, Liberty and Justice Inc.,
New York, USA

Heather Lord,
Project Director, Social
Enterprise & Urban Resilience,
Brooklyn, USA

Malcolm Lynch,
Chairman, Ecology Building
Society, West Yorkshire, UK

Geetanjali Misra,
Executive Director, CREA, New
Delhi, India

Carol Moore,
Director Global Alliances &
Strategic Initiatives, Heifer
International, Little Rock, USA

Joaquim Mucar,
Executive Director, Magariro,
Manica Province, Mozambique

Klaus Mueller,
Kmlink Museum Consultancy,
Berlin, Germany

Vida Mulec,
Project Director, MIT Center for
International Studies, Brooklyn,
USA

Karolina Mzyk,
Programme Specialist,
United Nations Development
Programme, New York, USA

Pieter Oostlander,
Chairman, European Venture
Philanthropy Association,
Brussels, Belgium

Oxana Oracheva,
Executive Director, Potanin
Foundation, Moscow, Russia

Gayle Peterson,
Senior Managing Director,
Programme Director, Oxford
University, Oxford, UK

Roelof Prins,
Managing Director, Stichting
De Verre Bergen, LD Rotterdam,
Netherlands

Abhijit Ray,
Co-Founder & Managing
Director, Unitus Capital Pvt
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Mark Sidel,
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and Public Affairs, University
of Wisconsin Law school,
Madison, USA

Aminata Sillah,
PhD Student, University of
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Clare Shine
Vice President and
Chief Program Officer,
Salzburg Global Seminar,
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Nancy R. Smith
Independent Philanthropy
Consultant; former Director
of Gender and Philanthropy,
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*Public Foresight Strategist,
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Alto, USA*

Andre Wilkens,

*Manager, Stiftung Merkator,
Berlin, Germany*

Bernardus Witjes,

*Director Programs and Projects,
HIVOS, The Hague, Netherlands*

George Zarubin

*Vice President and
Chief Development Officer,
Salzburg Global Seminar,
Washington, DC, USA*

Salzburg Global Seminar

Salzburg Global Seminar is an independent non-profit institution founded in 1947 with a distinguished track record of convening emerging and established leaders to address global challenges and drive progress based on Imagination, Sustainability and Justice. It convenes imaginative thinkers from different cultures and institutions, implements problem-solving programming, supports leadership development, and engages opinion-makers through active communication networks, all in partnership with leading international institutions.

HIVOS

HIVOS is an international development organization guided by humanist values. Together with local civil society organizations in developing countries, HIVOS contributes to a free, fair and sustainable world in which all citizens – both women and men – have equal access to opportunities and resources for development and can participate actively and equally in decision-making processes that determine their lives, their society and their future.

Appendix IV

Interviews

Interviews were conducted with the following session participants:

Emmett Carson

Young Billionaires and the Renaissance of Philanthropy

Silicon Valley Community Foundation CEO sits down with Salzburg Global Seminar to discuss how philanthropy is growing and changing

www.salzburgglobal.org/news-media/article/emmett-carson-philanthropy-and-social-transformations

Naila Farouky

“People would say our region is not ready for democracy”

CEO of the Arab Foundations Forums discusses continued unrest in Egypt and beyond, and the role of international philanthropy

www.salzburgglobal.org/news-media/article/naila-farouky-people-would-say-our-region-is-not-ready-for-democracy

Barbara Ibrahim

Egyptian Philanthropy needs Diversity

Founding director of the John D. Gerhart Center for Philanthropy and Civic Engagement at the American University in Cairo (AUC) on how Egyptian philanthropy is slow in the continuing revolutionary period

www.salzburgglobal.org/news-media/article/barbara-ibrahim-egyptian-philanthropy-needs-flexibility

Chid Liberty

“There is going to be no stopping Africa rising”

The “social innovation rockstar” speaks to Salzburg Global about African enterprise

www.salzburgglobal.org/news-media/article/chid-liberty-there-is-going-to-be-no-stopping-africa-rising

Oksana Oracheva

“Philanthropy doesn’t support or depend on political issues”

Executive Director of Vladimir Potanin Foundation on the rise of Russian philanthropy

www.salzburgglobal.org/news-media/article/oksana-oracheva-philanthropy-doesnt-support-or-depend-on-political-issues

Bettina Warburg

“People underestimate the power of the future”

In order to look to the future, we must first understand our past, or so the saying goes. For those at the Institute For The Future (ITF) that is a daily norm in preparing for the years ahead

www.salzburgglobal.org/news-media/article/bettina-warburg-people-underestimate-the-power-of-the-future

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HIVOS is an international development organization guided by humanist values. Together with local civil society organizations in developing countries, HIVOS contributes to a free, fair and sustainable world in which all citizens – both women and men – have equal access to opportunities and resources for development and can participate actively and equally in decision-making processes that determine their lives, their society and their future.