

**In pursuit of full potential:  
Contemporary narratives in the community foundation movement  
and their implications for emerging institutions**

**Background**

As in other jurisdictions around the world, Bermuda's civil society and philanthropic sectors drive the innovation and delivery of community-based solutions to address its most pressing social, cultural, environmental and economic challenges. Its participants fill the gap between the government and private sectors, thereby building a stronger overall community. But perhaps unique to Bermuda, the Third Sector essentially serves as its primary social welfare system. The Government has reduced its already limited support for social programmes, decreasing their viability, even though not-for-profits disproportionately deliver the types of essential services that typically fall to governments.

Beyond the issue of falling support from the Government, the charitable and philanthropic landscape is characterised by:

- 1) giving that is short-term and transactional which makes it difficult for nonprofits to take a long term view of their institutions and what they are trying to achieve;
- 2) a funding climate that is at the mercy of donors who are motivated almost exclusively by good will and corporate social responsibilities;
- 3) a limited regulatory framework, i.e. tax laws, a robust charitable registration process, that would a) otherwise motivate or regulate giving, b) provide a means for collecting and c) making accessible good social sector information compared to other jurisdictions
- 4) a lack of credible, manageable civil society information that makes it difficult for donors to assess not-for-profit performance and need in field and social areas, let alone make choices about direct service versus advocacy/policy support, funding associations/networks or building capacity building through their grantmaking -- common is a complaint of funders' not being able to give in ways they believe are meaningful
- 5) requests for evaluative data in the absence of a clear strategic focus on how to collectively tackle social issues are increasingly unmanageable for nonprofits in terms of sheer volume;
- 6) a steady downward trend in local corporate funding due in part to budget constraints but also in favour of more wider encompassing global social responsibilities, has made funds more scarce and a commitment of any significant human resources to prioritise local grantmaking unlikely.
- 7) access to funders' information on their interests is restricted, making fundraising time consuming and reducing the efficacy and efficiency of precious programme-directed resources and hi-jacking the potential for more impactful and/or collective work.

A key feature that seemed to be missing from Bermuda's Third Sector (both nonprofit and philanthropic) was a broadly focused community organisation that could 1) pool and invest funds, 2) serve as a vehicle

to provide advice on social investments and 3) manage information and grantmaking to provide effective and long-term support for the network of community-based activities. This need made a community foundation a timely and relevant proposition.

Substantiated by evidence garnered from an extensive feasibility study, a local community foundation was established in Bermuda to build sustainable philanthropic capacity in January 2013. Its mission statement is, “*dedicated to strengthening Bermuda’s community with an enduring source of funds – forever*”. In the context of a nascent narrative on the role of philanthropy in Bermuda and in the midst of a degree of social crisis, a key question for the new community foundation is, “what is this emerging community foundation being called to be”. A better operational and longer term strategic understanding of its potential was therefore warranted.

This paper explores seminal developments in the community philanthropy movement and their consequences for nascent community foundations, particularly in jurisdictions like Bermuda where no similar entity exists. An inquiry into the contemporary debates on the core functions of community foundations; and the consequences for their roles, sustainability and assessing impact is also undertaken. A list of recommended readings is drawn from this literature review, which can be used as a primer for Board and staff members of emerging community foundation and social capital markets.

**By way of introduction: What is a community foundation and what are the field’s organising theories**

A community foundation is a public grantmaking charity that raises funds from a variety of sources, with the aim of building an endowment as a permanent resource for a local community (Sacks, 2010 in CF Global Status Report)<sup>1</sup>. It is a creative social construction and concrete infrastructure that is built to serve a wide range of donors, who can offer a wide range of gifts and resources to each other as they build the types of communities they want to live in and to leave behind for future generations. Although described as a young field, community foundations have been in existence for almost century. Community foundation leaders have been generating a body of literature and a field of practice over that time frame that strongly articulates its core structure, its growth as a movement and now as a field that has access to a network of intermediaries, support organisations and peak bodies (Bertelsmen,

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<sup>1</sup> In ‘The Community Foundation Difference’, the Community Foundations of Canada also helpfully define them as, “independent, volunteer-driven, charitable organisations that aim to strengthen their communities by facilitating philanthropy, by partnering with donors to build permanent endowments and other funds from which they support community projects, and by providing leadership on issues of broad community concern” (p2).

1999, Walkenhorst, 2001, Hero, 2007, Hodgson & Knight, 2012, Kilmurray & Feldstein in TCFN, 2012 and Mott Foundation, 2008, 2012, 2013).

As local and global communities have changed, so have the contours of the field and the possibilities for the community foundation vehicle. These developments, which are the focus of this paper, have spurred wide debate on:

- 1) a community foundation's core mission (Bernholtz, Fulton & Kasper, 2005, Carson, 2002);
- 2) who to serve;
- 3) how to uniquely position itself in relation to other civil society organisations;
- 4) the strategic value it adds to the complex civil society and philanthropic sectors (Community Foundations of Canada, 2012);
- 5) the services it offers (TCFN, Murphy & Berks CCF, 2012); and
- 6) the set of measurements that best articulate to what the field, institution and communities it serves, can aspire (Carson, 2002, Gilbert, 2006).

**Community foundations' core approaches span a vast continuum -- from stewardship and endowment building, to grantmaking and facilitation, to contextualized inclusive leadership that can take the form of social change agency.**

Prior to 2008, the last major book on the topic of community foundations as 'agile servants' in America was published in 1989 (Hero, 2008). Now, 20 years later, the roles and responsibilities of these foundations have significantly evolved (p40). This evolution has occurred within two organising frameworks, both of which are too significant to adequately discuss here but that warrant mention.

First, community philanthropy is a new force in philanthropy driven by ordinary people working from the bottom of our societies, rather than by wealthy people working from the top down. It's premise is that having local people involved as donors in efforts to build civil society enhances its prospects of sustainability and leads to more lasting, entrenched outcomes by increasing local ownership and local accountability<sup>2</sup> (Knight, 2012). Gilbert (2006) advances a view of community philanthropy as creating resources that ensure purposeful giving, potentially long-term financial assets, and values-based intellectual capital for communities. She suggests that the best way of thinking about a community's investments reflect the soul of the organisation, the community it serves, or both?

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<sup>2</sup> The European Foundation Centre defines community philanthropy as, "the act of individual citizens and local institutions contributing money or goods along with their time and skills, to promote the wellbeing of others and the betterment of the community in which they live and work". Community philanthropy can be expressed in informal and spontaneous ways, whereby citizens give contributions to local organisations which in turn use the funds to support projects that improve the quality of life (Knight, p3).

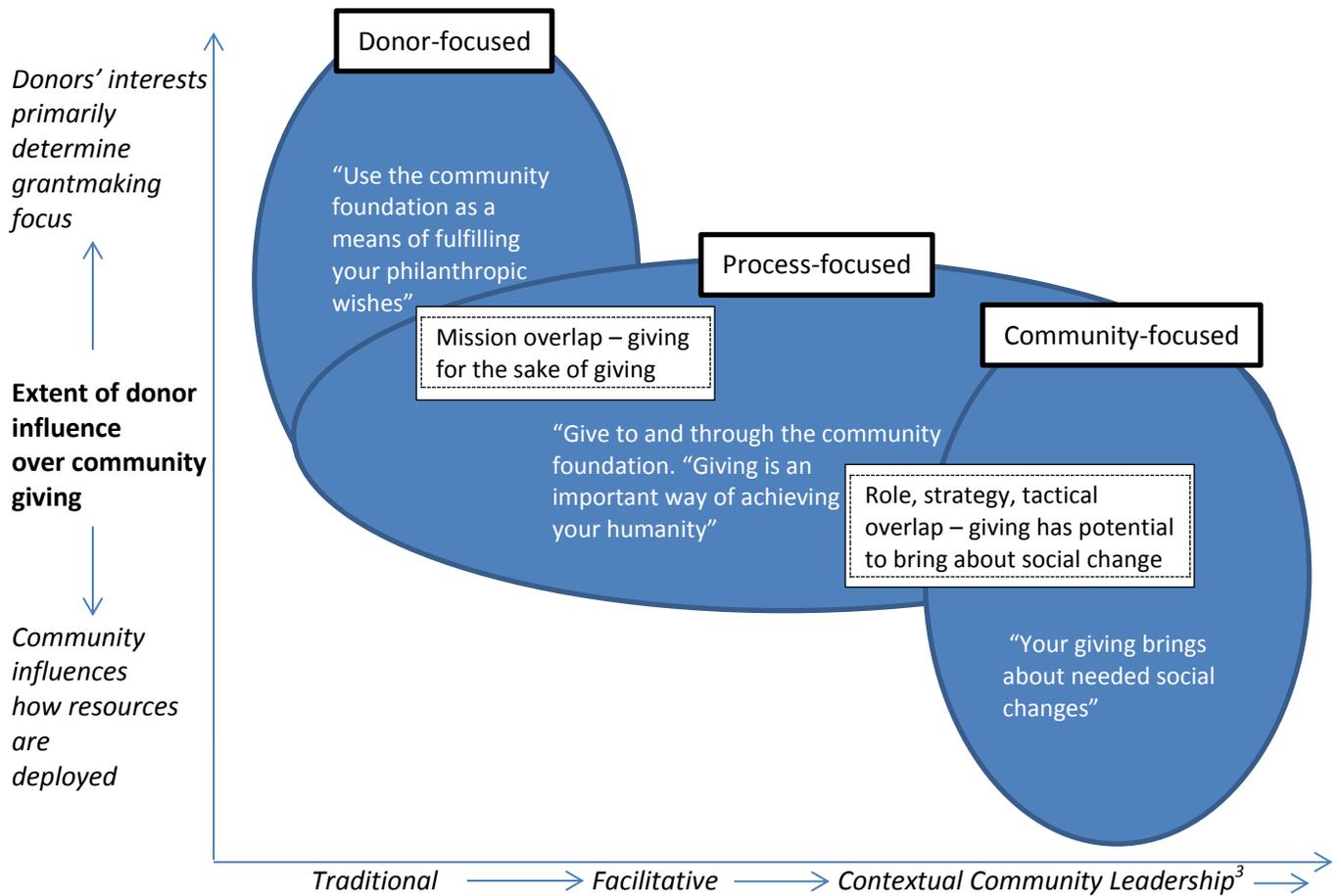
The second organising framework is community democracy. Community democracy is established on terms of engagement that include: broad and deep inclusion, responsibility for change that resides unequivocally in the hands of community members. The theory challenges the “culture-laden belief, often unconscious but seldom questioned, that the possession of great material wealth or professional expertise is necessarily accompanied by superior skills to make things better no matter what the circumstance” (p6). Keeping these two organising frameworks in mind, we can now tackle the concept of community foundations as one type of entity that functions within them.

The literature on the philosophical beliefs about what a community foundation is – its core business, and mission—is characterised by spirited debate on what can be loosely slotted into three approaches. These approaches are largely distinguished by their proclivity towards institutional engagement in community issues and their beliefs about their key clientele. Agreeing this mission clarity is important: it determines what a community foundation does and how it does it.

Traditional community foundations tend to view themselves as cultivators and stewards of endowed donor funds. Their approach is to promote philanthropy and giving and primarily focus their activities on securing bequests, living giving and pass-through giving. Grantmaking/Facilitative community foundations see their role as promoting philanthropy and serving as a vehicle for people to give. This type of community foundation positions itself as a platform upon which common interests and activities can be explored, channeled and actioned. A final approach that emerges in the literature is an inclusive or contextual leadership model. In this formulation, community foundations can serve as vehicles for social change or at times, facilitate and lead on in activities that tackle complex social problems. This approach is characterised as being community-based or community-driven. Figure 1 depicts these approaches.

*In the context of a wider community philanthropy movement and the use of community democracy as organising frameworks, what are CF's being called to be? Does the future and sustainability of CFs rest on tackling the question of impact in order to be responsive to its community of investors? If not, what is the value-add of CFs? What will the institution look like if we undertake new paradigms of usefulness?*

**Figure 1: Community Foundations' Institutional Philosophies & Missions Span Continuum**



*Sketched out at their fullest, community foundations have three core missions (approaches, philosophies): endowment building and flexible, comprehensive donor service; broad and effective grantmaking; and inclusive community leadership (Community Foundation of Canada, 2012). All community foundations combine these approaches but every community foundation is unique in the way it fulfills these roles and in the priority it places on each area (p3).*

Voices in the field articulate that a number of challenges present themselves in each community foundation formulation.

For the traditional model, 1) shifts from place-based philanthropy to situations where people having multiple, meaningful connections to communities, 2) less stratified hierarchies and 3) calls from disenfranchised communities for greater control over their own direction are threats. The predicted

<sup>3</sup> Some critiques argue that community foundations operating in this sphere are better characterised as operating or community development foundations.

results are that traditional community foundations will undergo subtle but significant shifts in assumptions and priorities. Field leaders suggest that traditional models:

- 1) will reconfigure in some way for community benefit, aligning and arranging themselves (with their donors) to achieve greater impact on their communities – consolidation, coordination and new business models feature here.
- 2) shift in focus from the demonstrating institutional health to communities (Bernholz et al, p36)<sup>4</sup>
- 3) shift from managing financial assets to long-term leadership (p38) – mobilizing a community and its resources to recognise the community’s collective aspirations, engage its own toughest challenges and embrace its most inspiring opportunities
- 4) shift from competitive independence to coordinated impact

Murphy<sup>5</sup> contends that if a community foundation remains a steward, it can be accused of conservatism and complacency that borders on irresponsible – too content in the belief that the world is equal. Yet, there is acknowledgement that if community foundations play a larger role in the social change movement, they may risk the support of donors. Another perspective on moving away from the traditional model is that even with significant resources, philanthropic dollars may never supplant what governments do or should do, and that financing [social change efforts] can have enormous impact – the type of impact that donors of all types (even those who have established special interest funds) would want to see on issues they care about (Confessore, 2011).

Systems change supporters advocate that traditional community foundations need not worry too much about donors being scared because donors are attracted to issues—not an agenda – but information about the causes they care about. The new task for traditional community foundations is to help donors structure and articulate their ideas into their philanthropy. Board appointments can no longer be about appointing bankers, lawyers and businessmen, now have to evolve to include community activists and grassroots leaders.

The primary reasons behind advocating that community foundations continue serving almost solely in the traditional role as stewards are fairly limited in the current literature. One reason presented is to avoid getting involved in contentious and complex social issues which may scare donors and honouring the intent behind a gift. The belief is that donors who are interested in having deeper social

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<sup>4</sup> The authors suggest that every service and product community foundations offer- from donor education to program capacity-building, from estate planning to initiative management, from donor advised funds to scholarships, giving circles, online fund monitoring, and more- is now available from other sources or will be very soon.

<sup>5</sup> An unpublished paper shared with Berks County Community Foundation board)

impacts than charitable aid or direct service support might achieve will make these arrangements through their individual grantmaking. The hope is that their collective gifts will support a wide range of field interests' and needs, even if achieving a breadth, depth or level of impact is not intentional. The counter debate seems to be that either way, the community foundation risks the support of potential donors. A commentary that speaks to the concern community foundations being fairly unresponsive to the communities they serve is that, "if after several years, there isn't the ability to articulate a special need in which the Board or staff could identify the role the community foundation plays in it, we are not doing our job (McGhee, SIFP lecture, April 19, 2013). Even the fairly neutral role of gathering best evidence on a field of practice and summarising it, begins to capture the essence of a broader mission and purpose for more traditional community foundations.

Many traditional community foundations now pretty much sit in the middle of community philanthropy work because while endowments and unique positions in the community allow them to tackle challenging issues, the growth imperative requires them to be sensitive to popular sentiment.

In recognition of the important community foundation approach as grantmakers and facilitators, Winsome Hawkins, who was affiliated with a Caribbean Philanthropy Network says that the pivotal role for the community foundation is to know the social issues and nonprofit community very well so that it can be the bridge between donors and the community. It has to have "donor education" as a priority and do this in such a way that donors do not feel pressured, but rather assured that not only are they supporting the issues and organisations they want but that they are actually making a difference in the community (2009). The literature is pretty much in agreement on the articulation of this core mission.

In support of the leadership model, Hodgson and Knight (2012) posit that the new generation of community foundations blurs the boundaries between mutual aid and philanthropy by placing particular emphasis on the role and value of local assets and resources, which may include money as well as different forms of social capital, such as trust and volunteerism or mutual help and support. And that whilst altruism features here, self-interest does too – citizens in even the poorest communities have the potential to control, invest and build local assets, while acting for social and economic justice (p6).

Also in support of leadership in social change agency, Bernholz, Fulton and Kasper (2005) suggest that U.S. community foundations have entered a pivotal new era and the years leading up to 2025 will be marked by dynamic change within and around community philanthropy. They caution that the promise

of community foundations will not be fully realised [if they stay within the confines of their traditional missions]. They posit that the competitive environment for community foundations will be such that being stewards, alone, will be inadequate. Professional service firms are incorporating philanthropic advice as part of their suite of services, improved technology and connectivity allows donors to link directly with nonprofits, there will be competition from low-cost/high-volume wealth management advisors and donors will be enabled to directly manage their contributions in perpetuity through emerging investment service providers.

Potter (2012) proposes that with a solid infrastructure and national standards for the field, it is now time for community foundations to be proactive leaders in addressing entrenched community problems such as persistent poverty, unemployment or underemployment, lack of adequate education and preventive health care and environmental damage. Carson adds that as community foundations spring up around the world, in Central/Eastern Europe, Africa and elsewhere - they don't place as much emphasis on endowments, which were considered essential in the traditional U.S. models.

Building on this thinking, transatlantic conveners (TCFN, 2007) made three observations:

- 1) that community foundations shift from focusing inwardly on institutional infrastructure and preservation to outward focus on community need and benefit, recognising that a focus on community impact has to be balanced with sufficient attention to developing the institution so that it is robust, credible and viable, especially for developing community foundations
- 2) that community foundations must shift from being asset managers to being long-term leaders in communities – be cautious about taking asset-building and transactional donor relations versus grantmaking at the expense of raising funds and sustainability, taken to the extreme
- 3) that community foundations must shift from a posture of competitive independence to one in which we work collaboratively for coordinated impact – in the US, community foundations compete for the attention of increasing sophisticated donors who have direct access to NGOs, commercial giving vehicles and innovative, technology driven philanthropic solutions. Conversely, in Russia or Europe, while competition is not an issue, working in isolation is.

*If it is true that we are in the era of “community foundation leadership” in which programme officers, donors, foundation executives and their boards are forging solutions to community problems and developing strategies to take advantage of community opportunities (Mott Foundation, September 2008), then even the most conservative of community foundations need to resign themselves to a function or a role that facilitates some type of social change.*

Summarily, Pennekamp (2013) expertly frames this debate on mission, philosophy and approach as a tension between donors wishes and programme activities; sustaining funding traditionally versus responding to community needs in ways that may not align with donors wishes. The CEO of Humboldt Community Foundation suggests that whatever a community foundation does, it will live in this dichotomy and that any choice a community foundation makes will attract or chase some people away. Their belief is that if you take a stand on issues, in an inclusionary way, people will be attracted to you. Humboldt County has found that some donors are getting involved in shaping policy and organising.

The current understanding is that there are many ways to think about community foundations. Community foundations are clearly grappling with the articulation of their philosophical roots and consequences: and the resulting tensions. There is certainly evidence of the community foundation phenomena growing its three roles. Emerging community foundations can draw two conclusions: this debate is healthy and truly represents growth in the field, within the operating frameworks of community philanthropy and community democracy. Given these two salient reminders, it seems that the core community foundation functions are still at play, the benefits and risks (Reynolds, 2008) being:

- 1) Stewards - endowments enable the CF to have a stable source of revenue to meet the needs of the future and make it less subject to the whims of any one donor. It enjoys a certain degree of independence as it goes about meeting community needs. There are clearly accepted and well-documented positions on its essentialism and benefits to donors. Critiques of this role are that endowments will not address all the charitable needs of a community because funds are distributed solely for programmes that interest wealthy donors and may not actually address community needs or the plight of the poor. This critique is mitigated by using discretionary grantmaking as a model and means of educating donors on their own potential impact.
- 2) Facilitator/Grantmaker- making hard choices to achieve effective grants taking into consideration age and location, but without leading. A question arises around the extent to which achieving social justice in each field is a priority.
- 3) Community leader- conflict or duality of interest, potential for partisan ensnarement, incompatibility with the foundation's grantmaking or other programmatic interests, staffing capacity. Capacities for this role include the ability to lead with grace and to step away if achieving the desired outcomes requires others to bask in whatever glory may be forthcoming, skill and high regard.

As a maturing field, it seems community foundations will have to give themselves permission for a lateral and vertical stretch as needs change and arise. Table 1 summarise the deeper consequences of the conceptual and philosophical choices for community foundations.

**Table 1: Community Foundation Continuum of Charity to Philanthropy (adapted from Carson’s work)**

<b>How investments should be directed; the role the CF should play?</b>	<b>Traditional/ Stewardship/ Pass through</b>	<b>Facilitator / Grantmaker</b>	<b>Contextual Community leadership</b>
	<b>“Give through a CF”</b>	<b>“Give to feel good about giving”</b>	<b>“Give to a CF”</b>
Characterisation	Donor-focused and driven. Grow the number of donors and assets. Giving should make the donor feel better.	People have gifts to give of all types – giving is the driver. Giving is a mission in and of itself. Promotes giving as a way to personhood. Giving is a means to human self-fulfillment	Community-focused and driven; ethos of change. Giving is a means to an end and assets can be transformative. Giving should be change-driven – giving should help make the world better and solve social problems
Messages to other types of CFs	Social change narratives will scare donors and the value-proposition is to facilitate philanthropy. Don’t get involved in “Politics” or “politics”. Put your emphasis on good giving, good governance. Donors’ interests cover a wide spectrum of needs and combined with the Board members’ have integrity, funding will get to the good institutions. We make good grants to good institutions.	It is not our responsibility to formulate a solution or change agenda; we should create the infrastructure to allow the capacities to make a decision to change something. As a philanthropic structure, we don’t have the legitimacy to perform the change agent role. Helping people achieve their personhood is our role – democratizing philanthropy. It’s more efficient to change the tax infrastructure so that the government does its job with public monies. Don’t enter the political field, don’t compete with nonprofits; no projects of our own.	Legitimacy comes from being local and being representative. The charitable bank model is old-school and too generic. Inequalities exist. Specific fields are underfunded. Emphasis should be on community needs. The work needs to have some content foundations and we can fill information gaps, bridge inequality gaps, and empower the community for the common good. Putting donors’ concerns first potentially creates a non-responsive NGO community.
Message to stakeholders	We will do as donors’ wish.	You have assets and a role to play in gifting them. We should find ways to help you make your contribution to a common good that you define. We are intermediaries to help people give in simple, pleasurable ways	The community has so many needs, let’s work together and use our resources to solve them. We are a vehicle through which you, as a community of donors, can achieve social change
Funding activity	Direct Service	+ Capacity Building Association/ Networking	+ Advocacy/ Policy Reform
Examples of grant activity	Basic necessities and aid, food banks, Individual training/education/development after school programmes	+ Field convenings Community Organising; Public Education to Change Behavior	+ Policy Reform
Depth of CF Involvement	Provide a giving structure	Provide a structure for people to work	Channel resources to solve problems

Philosophical belief	Underlying social structure is fundamentally fair – economic outcomes are based on individual merit or good luck	Everyone in society can make a contribution to the common good. The CF provides information, but people ultimately decide what is to be their contribution to the common good.	The value-add of a CF is that it is deeply rooted in the community – its multiple access points give it unique insight and positioning to facilitate social change.
Core belief about mission	Promote culture of giving: giving is an end in itself	Change culture of philanthropy; promote culture of giving. Help people give in their own way. As a consequence, the individual becomes a better person—community change is a healthy latent outcome.	Giving should result in social change
Position on taking a position	No institutional point of view on bringing about social change. It's easier and less controversial to get support if we simply provide a platform for people to give	Promoting giving in and of its self. Giving helps people feel like better people- "personhood". Social change and consequences can be a healthy bi-product of our work, but is not the core mission	Takes a point of view on social needs and champions a common good, if and when needed
Critiques	Resources fail to get through to grassroots where they can drive local people's images and enthusiasm for progressive social change; Neutrality is not accurate an accurate description or a desirable posture for CFs – CFs should be advocates for the best possible outcomes for the communities they serve. The model has the CF serving as a charitable bank -- other business structures can perform this role more cost-effectively and just as efficiently. The donors decide - "billionaire policy makers" approach is paternalistic and not particularly strategic.	View doesn't take advantage of pooled fiscal resources to maximise impact or the possibility that a CF may be compelled to take a view on a social issue, as a neutral connector. Do you start from the needs or do you galvanise opportunities and resources that live and can be used by the community, that otherwise might be lost? What gets lost if we put the need to feel human in front of striving for a common good? If giving is the agenda and one good outcome is the common good (the democratisation of philanthropy), is it possible to coral limited resources to make any meaningful change. If change is not a defined outcome, can this work?	Taking a position on a social issue is "political" and scares donors; Talk of social change makes donors concerned that "their" funding will go to causes they would otherwise not support. Without the support of big donors, the CF model won't get support—no money, no mandate, no mission. Bottom-up efforts to develop a progressive social change agenda fail to gain traction, anyways, because activists do not connect with the mainstream agendas of development agencies and governments. Idealistic. Contrived in the way that they define an agenda.
Key reflective questions for the CF model?	Does the role have relevance going forward, in and of its self?	Can communities achieve common outcomes that adequately meet the needs of everyone?	Can you achieve social change without money?

Trying to have this debate on mission is difficult for emerging community foundations because as they grapple with the question of “what to be?”, they are perhaps unwittingly debating tensions that stem from asking conceptually different not mutually exclusive ones like, “What to do at a given time in a given place?”, “What tactics will we use?”. Before I discuss what emerges in the literature as the variant roles community foundations play, I will discuss the dilemma of “who to serve”.

***The dual-focus dilemma and making the strategic value proposition***

Past the issue of negotiating mission, the literature continues to highlight major debates on the emerging roles of community foundations on community foundations servicing two sets of stakeholders with seemingly fairly disparate interests: fund donors versus communities. The debate has two themes:

- 1) Responsiveness (where and how to direct services) – to donors who set up donor-advised funds or to those in the communities in which the community foundation operates
- 2) Increased sector responsibility for improving social outcomes is the primary means of demonstrating value. The implications – a need to demonstrate an ability to play with others, to demonstrate shared outcomes, delivering on capacity outcomes and their sustainability.

***On responsiveness***

Social Justice or donor-advised funds, being responsive and reactive versus proactive, leading conveners versus participants? Facilitating under the auspices of neutrality or impartiality? These are the questions Carson, as far back as 2002, predicted would be at the heart of a potential crisis for community foundations -- a choice between catering to donors’ needs or focusing on community needs.

Table 2 below summarises the two potential community foundation customers and focuses.

<b>Donor-focused (Commercial gift fund model)</b>	<b>Community-focused (Change-makers model)</b>
Customer is the individual donor who opens a charitable account	Customer is the community as a whole
Catering to donor needs	Focus on community needs
See mission as responding to needs of individual donors	See mission as building unrestricted endowment assets to meet community needs
Acquisition of donor-advised as the end result	Acquisition of donor-advised funds as a means to develop new relationships with donors, with the objective of eventually acquiring unrestricted assets from those donors
Promote civil society and build social capital	
No pretense about creating any shared sense of community but value-proposition will be challenges and new value may be found in defining community and helping donors	Because getting unrestricted funds means that those who commit them agree to support purposes they cannot know and that may change in ways they cannot anticipate, by a group of people whose identities and commitments

explore areas the potential of their giving	may change (in Carson, 2002) it's harder to get buy-in – no one feels a singular obligation to underwrite the public good
Measure success by asset base – very new gift is an achievement. Criticised as a crude measure	Inadequate development of measures of success. Need to develop more comprehensive and sophisticated measures, range of metrics
To be learned from the other- convening and community building have tremendous value and were the origins of community foundations	To be learned from the other- keep a steady eye on ways of generating income and business model recalibrations

If we accept these binary classifications, we see community foundations working from two distinct sets of beliefs, as they adapt to different cultural, political and economic contexts.

***On demonstrating social impact and good outcome – what are community foundations’ value-add?***

Pennekamp (2003) suggests that community foundations’ responses to this tension about what to be (or become) has resulted in the mass production of indicators. Clear metrics set up by people in communities. Very specific outcomes for grants. However, from a community standpoint, he wonders whether indicators help much. Specifically, he suggests that whilst an analysis of indicators is good, having them doesn’t necessarily change outcomes. Indicators don’t make things better and that there are times when instead of marking community progress on the basis of a set of semi-relevant indicators, sometimes you have to roll up your sleeves and do the work. Data is important to the extent that it supports action. He believes that the community foundation be less preoccupied by measuring and more focused on creating a stage for people, to support them; to be in the practice of supporting meaningful change and action as determined by community members through an inclusive process.

Similarly and true to the predictions of Bernholz, Fulton and Kasper (2005), community foundations began to seek measures of effectiveness, at first focusing on asset size. But, they have recalibrated to develop indicators of effectiveness – of which asset size informs very little. As a first step, setting standards for ethical behavior, accountability, transparency and transaction processing are in progress. This process is helping community foundations assess their value-add and to figure out what services to outsource or keep in house. For example, Davenport (in Bernholz et al, 2005) suggests that one opportunity here is for community foundations is to embrace new back-office tools and restructure their front offices to be innovative contributors to community development.

David Mathews makes the point that benchmarks and other performance measures used to demonstrate impact can have a deadening effect and that experiments that communities undertake to

strengthen their civic capacity don't always produce the definitive outcomes that performance measures impose (Pennekamp and Focke, 2013, p3).

In an interview with Anne Kubisch, director of Aspen Institutes Roundtable on Community Change, submits that the approach to measuring community foundation outcomes should encompass community or civic capacity building, community-based problem solving, democratic institution building, and comprehensive community change – concepts, which are still met with skepticism (2013). She advocates that community foundations strengthen the evidence base of the field and map the successful contemporary activities, acknowledging that this work is in progress.

Selecting measures from the ground up, measuring and reporting on things that people care about – community foundations have to get this balance of measuring impact right. More data won't necessarily tell us what we want to know and in fact, and the ongoing pursuit of more measurement is unsatisfying. “How well we worked with others to facilitate a change?” or “How do people feel about their community?” will be the questions of the future.

Key themes on assessing impact and the strategic value-add of community foundations are:

- Development of good governance standards, taxonomies, social indicators, and civic indicators (funding may not be commensurate with desired outcomes – another question) is the new narrative. Focusing on governance is perhaps an easier question to address than is impact and has been a good starting point.
- Shared standards (effective practices and models), shared benchmarks and indicators (common understanding of what we could achieve together, agreement on what we will tackle and how it will be measured) is going to be the way forward. Agreeing shared outcomes (agreement on what programme participants, organisations, the wider community look like if we get it right – vis-à-vis each other or against a wider community of indicators)
- Balancing the tensions between civic, social and sector indicators and the capacities and responsibilities of emerging versus established community foundations, i.e., smaller entities can provide information and set themselves up for the future, but larger, more established ones have the capacity to really make it happen .

Guiding features of the new outcome narratives will be:

- Keeping the end in mind and asking the right evaluative questions at the start. If we take this action, will it effectively deliver the changes we seek? What more do we need to know to deliver on a social agenda?
- Conducting after-action reviews over intensive and expensive evaluation processes( Learning in the Thick of It, Darling, Parry, Moore, 2005)
- Unpacking “soft outcomes” and adopting community indicators as the core means of assessing CF progress, i.e. mapping community wellbeing (Salvaris and Wiseman, 2004), Urban Institute’s community wide-outcome indicators, 2003, Canada’s Civicus indices, GFCF key outcomes for community foundations (Hodgson, 2010), measuring community capacities for comprehensive change initiatives (Association for the Study and Development of Community, 2007); measuring sentiments on community wellbeing and citizen involvement (Community Science, 2008); building strong communities (Vital Signs, Canada), and using indicators like transparency, trust as key community foundation value –

### **Realising the new promise: Grantmaking-plus roles and strategies**

The next heavy theoretical lift on community foundations is perhaps best framed by the following question:

*“How do community foundations become the vehicle to help people do what they believe is good using the information and gifts that they bring to the table in a way that tackles deeply-rooted problems that require shared decision-making to deliver on shared outcomes that bring about lasting social change?”*

This question about the roles that community foundations can play and how community foundations can position themselves, can be better posed after the ones on mission have been resolved.

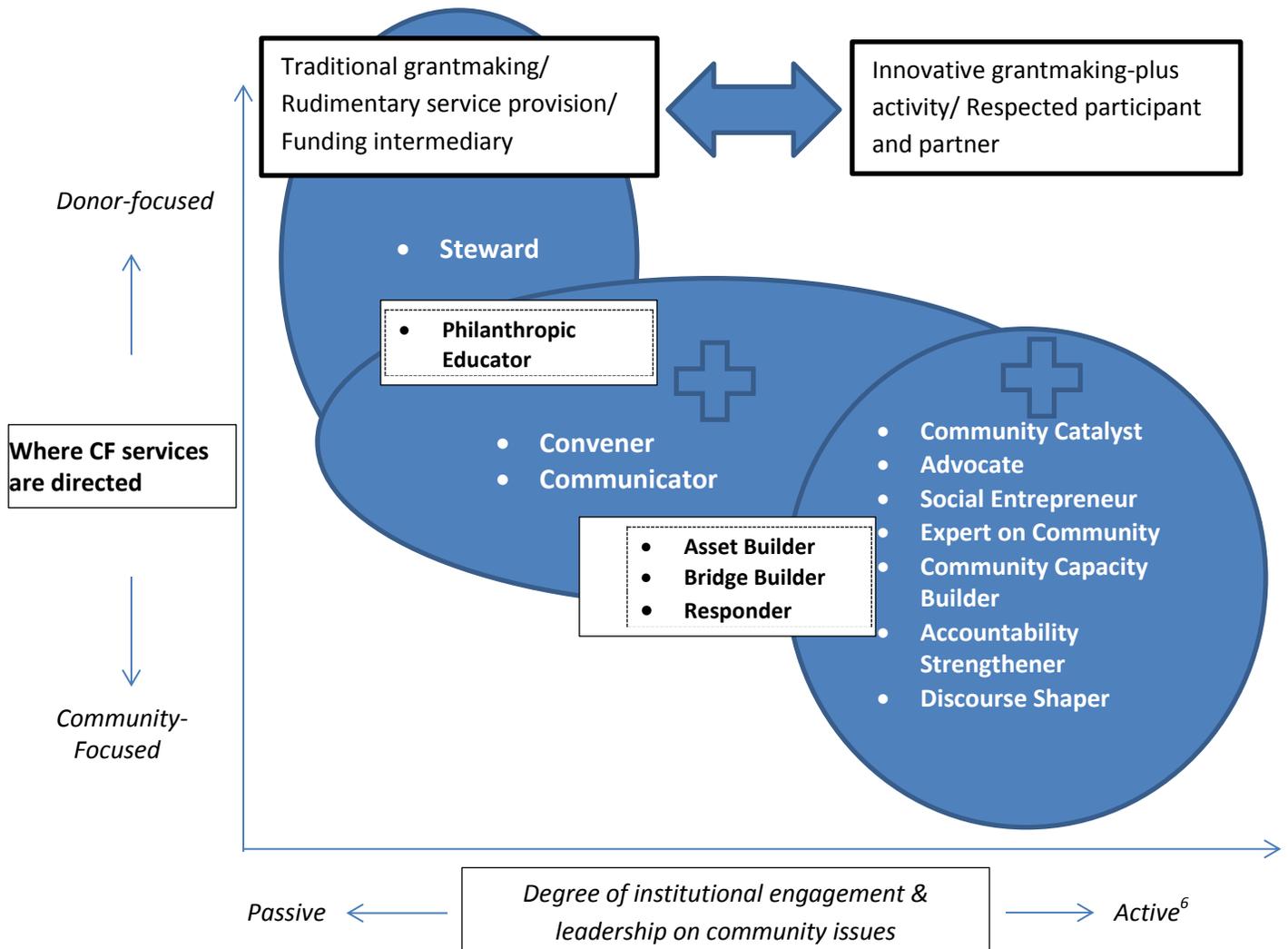
Bernholz et al (2005) propose that community foundation can now mix and match from a range of strategic roles to meet the specific needs of its community and complement the existing competencies of other community organisations. Kilmurray and Feldstein lay out a number of useful non-grantmaking strategies for expanded community foundation roles (TCFN, 2012, p 18). The community foundation field is clearly adapting to a full spectrum of roles. And from time to time plays them on the basis of its: 1) mission and values, 2) the resources (in the broadest sense) it has to make a significant difference, and 3) consideration of who else could, should or will do something about the issue (TCFN). This means that over the last 15 years there has been a philosophical shift in understandings about the roles that community foundations can legitimately play. Although they must continue to be seen as even-handed,

(Murphy, 2013). Very recent reports identify a number of ways this looks, as summarised by Table 2 below and depicted in Figure 3.

**Figure 3: Potential Non-grantmaking roles for community foundations**

<b>Kilmurray and Feldstein</b>	<b>Chaplin Hall Center for Children study (in Bernholz, Fulton and Kasper, 2005)</b>
Bridge Builder – helping organisations understand and reconcile differences	Growing local leadership – linking diverse stakeholders to build broader constituencies and create new partnerships
Community Catalysts – encouraging an appropriate organisation(s) to take on advocacy responsibility on issues that need an advocate	Brokering regional solutions – facilitating action across cities, school districts, and service areas to address regional problems
Asset Builder- teaching young people, the general community and the wealthy, all seen as key assets, about philanthropy; helping people in the community obtain assets, like housing	Maximising access to government resources – helping communities to connect with the public sector to access government resources and develop collaborative solutions.
Social Entrepreneur- motivating community members to take action or using reputational capital to bring people together to craft solutions for big problems.	Enhancing community capacity – building the knowledge and capacity of community-based organisations to achieve their goals through training, technical assistance, coaching, referrals, and other learning opportunities
Expert on Community- generating credible information; making sector data available	Building useful knowledge- with firsthand access- spot trends, surface issues, provide analysis and serve as hubs for community information
Philanthropic Educator- providing guidance, exposure and education on philanthropy and CSR	Nurturing high-impact philanthropists- engaging and mobilizing donors as participants and leaders in community problem solving, helping donors to share knowledge, expertise and networks
Responder- taking initiative in bring parties together to negotiate a response to a social problem	Strengthening accountability – leadership to develop metrics and think through issues of accountability, measurement and evaluation.
Steward- recipient and safe keeper of donors’ funds and other valuable assets	
Convener- taking the lead in either initiating action or adopting the role of advocate, to facilitating the lead of other organisations	Shaping community discourse about key community issues and bringing together community stakeholders to forge long-term connections and plan local agendas that involve all constituents in the design and implementation
Communicator – where there is a rich local infrastructure of NGOs and other agencies, the non-grantmaking role of the community foundation may well be simply ensuring that one organisation is aware of what another is doing	
Advocate – if there are issues or challenges that need an advocate, and where no other organisation is stepping forward to take that role, the community foundation may provide this type of leadership	Advocating and partnering for policy solutions – pursuing policy roles, either directly or indirectly, as the issues their constituents face cannot be addressed solely through grant funding.

**Figure 2: Community Foundations play numerous roles; employ multiple strategies**



Murphy (2012) frames the debate about how community foundations position themselves as a question of capacity, donor interest, and at the request of the community, glaring need. Berks County Community Foundation, with which he is affiliated, undertakes a deep reflective process to assess the fit of the organisation with an activity it is proposing to undertake. One that potentially “fits” is scrutinised through a lens of community importance, an analysis of who else is looking at the problem, the availability of funds, potential impact, relationships, etc. He stresses that this decision making process is more art than science. But as a consequence, from time to time, Berk’s County Community Foundation finds itself stepping outside of the stereotypical “making grants” function and taking on a broader leadership role in community issues, says its President, Kevin Murphy (2012).

<sup>6</sup> Refers to the idea of building social leadership capacity versus running a business for or with social purpose. In this role, a foundation uses its reputational capacity to build support for a solution.

Similarly, the CF should support initiatives that bring the people most effected by issues, to the table says Peter Pennekamp of the Humboldt County Community Foundation (2013). “People need to be engaged and the hardest thing to do is to establish equitable philanthropy”. “The challenge is keeping out what philanthropy distorts by being there?” Articulating a handful of key roles, Humboldt has been taking a position on this; developing an institutional narrative about what a community foundation that practices the expanded roles will look like:

- 1) No process goes forward that is not equitable
- 2) A rule of inclusion means that disenfranchised communities are not just invited to the table but are involved in planning from the beginning
- 3) The community foundation then back’s what the participants come up with – “it’s their agenda, not ours”
- 4) The community foundation only overrides a community decision if it is illegal
- 5) The community foundation backs the initiative- they are not a player or co-producer “because if we co-produce, we will be seen as having too much power and people will do what they think we want them to do”.

These frames, the responsibility for articulating a special need that a community foundation needs to support and that from “from time to time” a community foundation takes on broader leadership roles in a community, provide us with powerful and nuanced places to lift off further discussions.

### ***What deepens the narrative? What iterations are community foundation leaning towards?***

The emerging literature seems to point to a need for community foundation agents to craft a new utility agenda which will comprise a mix of strategies and activities.

Contemporary debates about what a community foundation should “be” are no longer about its 1990’s self, where its sole duties were to grow the community foundation’s assets, be a spokesperson and a neutral convener (Murphy in Potter, 2013). While some community foundations still operate that way, others have evolved. These institutions encourage and engage residents’ participation in addressing local issues – and as a result are recognised as out-front leaders working for positive societal change.

As outlined above, although there are underlying tensions about the missions and values of community foundations, there isn’t one purist formulation of the entity. What is clear is that nascent and emerging community foundations must pay critical attention to the environment, strengths and challenges within

each context. Where an opportunity seems to lie is in bringing these practices into the narrative of deep seated institutional practice or change. This means taking on the question of how community foundations' missions have or may change, and beginning to align the people and processes – what the organisation will look like-- the systems and structures, with the philosophy, emerging programme models and paradigms. This shift represents the next key transition for the CF movement and field.

A fundamental role for community foundations of all types is to be the purveyors of good information, to connect people with information about their resources and needs that only they have, and to take a cross-sector view to facilitation. It falls to someone or some institution to begin to make sense of the wealth of existing and emerging resources.

Perhaps the most compelling prediction on where community foundations will need to be in the future is Bernholz et al's (2005) framing of the old versus the new: the old measure of success was growth in assets under management, the new is demonstrated leadership on behalf of a community; the old definition of philanthropic product was a structure for devoting financial assets to charity (DAFs, scholarships and charitable annuities, the new is a combined package of know-how and financial resources that results in community improvement. This new philosophy and sets of strategic leadership roles of community foundations are rapidly emerging via specific programmatic activities. Given the wide variety of areas where community foundations are based, the opportunity to exercise a non-grantmaking role will differ from one situation to the next and from foundation to foundation.

At a philosophical level, one could argue that when people make gifts, they ultimately want to see some level of change and impact. Very few references seem to outline how community foundations help guide donors through a direct service to advocacy to policy continuum that they can support, whilst staying within their field of interests (CF Insights, 2011); making strategic investments and helping philanthropists make investments across the range of issues they care about – assisting them with information that helps them achieve their purposes. This is a mindset and practice issue and the limited literature implies that more work can be done to educate staffers as well as philanthropists.

For CF's themselves, of the three functional roles, grantmaker, vehicle for philanthropy and community leader, the work seems to be fairly balanced but one could argue that each role could be deepened. We can make this assessment on what is being measured and reported and in what ways. If we say we make good grants to good organisations, robust measures of impact would need to be present. But at

best, we can probably argue that well-governed organisations get grants and that the approach to assessing impact, short, medium, long and end-term outcomes is nascent. Data seems to be gathered on a per-organisation, per-theme, and per-field basis. A growing but limited pool of information is available on how communities of donors and grantees worked together and can tell the stories of their shared impact.

### **Implications for the Bermuda Community Foundation and others in emerging community philanthropy markets: Conversation starters**

*A community foundation is part steward of permanent charitable assets to benefit Bermuda forever, however its needs change. It is part grantmaker, judiciously and strategically allocating grants from those assets. It is a donor services provider, learning about, facilitating and hopefully educating its donors to be good, or better, philanthropic agents. In its grantmaking and donor services role, a community foundation should be the gold standard for information gathering and dissemination about a community needs, challenges, gaps in service, stellar community leaders, etc. And at its best, a community foundation becomes a convener and catalyst, often the most influential catalyst and convener because of the relatively neutral or even-handed position it occupies in a community, able to assemble stakeholders from across issues and viewpoints and to gather them for the common good (Sutherland and Edwards, 2012).*

Some possibilities and predictions about the roles emerging community foundations will need to play based on the experience to date of the Bermuda Community Foundation (2012) but arguably applicable to many emerging small nation markets are:

- 1) For grassroots and community-based groups, community foundation are likely to position themselves to help them reach across the service continuum to lead or join advocacy efforts in genuinely collaborative efforts- and providing the facilitative supports to foster that work.
- 2) With small grantmaking budgets, emerging community foundations are likely to fund cross-sector and capacity building work like field leadership, convenings and good governance. Leading NGO's/established, back-bone organisations<sup>7</sup> and intermediaries will have to demonstrate field leadership and convening capacity. It may mean that very few grants go directly to individual nonprofits but go towards capacity building, convening and cross sector

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<sup>7</sup> From her own research, Kubisch (2013) surfaces 21 qualities of effective backbone organisations: representative entity with majority community voice and legitimacy, facilitative leadership, ongoing leadership development is a priority, adequate core staff, adequate resources, effective implementation of projects, ability to leverage resources for the community, data expertise, communications expertise (continuous communications- web, Facebook, newsletter), effective messaging, convening authority, bridge builder and manager of partnerships, credible and legitimate among community residents and organisations, keeper of the vision, comprehensive perspective and multi-sectoral leadership, political access and connections, effective balance of competing tensions (root causes and quick action; entrepreneurial and mission-driven; comprehensive and focused; adaptive and intentional, etc.; linkages to field-level lessons about best practices; learning organisations; able to influence policy; strategic communications expertise; and conflict resolution skills.

infrastructural development. Community foundation unrestricted funds could fund the unsexy stuff (says Kubisch, 2013) - the long term processes that are required to solve complex social problems. Building social capital, organisational capacity, leadership and management capacity, data systems, strengthen infrastructures, expanding funding ideas from charitable aid to strategic philanthropy, under-girded by a deeply rooted-belief that people give because they want to see positive change.

- 3) Emerging and thoroughly modern community foundations will measure their success on the basis of community well-being and civic capacity- this will look very different than social issue metrics, good governance or programmatic outcomes. This field will uniquely become the domain of community philanthropy and community foundations and their value-add will be unpacking and tracking what have been perceived as soft or developmental outcomes. Trust leadership, sustainability, democracy. They will complement the resources and desires that are already present in organisations, people and communities. Good technology and good process will make it possible but deep planning will have to be prioritized.
- 4) Nonprofit as prospective CF grantees will be called upon to measure themselves against an international standard- programmatically or at the field level- and community foundations will be responsible for helping them discover the right mix of metrics that is both meaningful and manageable.
- 5) Emerging community foundations will be technologically progressive, fiscally responsible and demonstrably able to serve multiple stakeholders.
- 6) Conversations with donors will go deeper. If a donor loves a charity, conversations with that donor will involve how to make that charity stronger, more effective or more responsive, sustainable—or to get more funding to either it or its causes. If the funder loves a field, the conversation will involve being creative around the range of approaches in that field from direct service to policy advocacy to networking and association to capacity building—and an evaluative component will accompany each grant. The community foundation will serve as advisor, soul searcher and researcher, coming prepared with this full range for options for donors.
- 7) Consequently, community foundation staff could very likely be social workers or community workers with strong interview and assessment skills and roots in community organising. They will be strong smart strategists and thoughtful, curious nurturers of community assets versus financiers. Organisational leadership and staff will be able to balance a degree of purposeful and fulfilling institutional realisation with common sense and pragmatism about approaches to donors, change strategies and organisational positioning.

- 8) Traditionally oriented community foundations will bear the responsibility for expanding their scope of services to donors – to provide donors with a good mix of governance metrics and evaluative tools and a range of funding options that span the capacity within their charity interest or area or the types of support across a field. Making use of their unrestricted funds to fund research and to share that information will become common practice.

Emerging community foundations need not sacrifice the core missions of community foundation to become active leaders in the communities we serve. True, we must recognise that local contexts, length of establishment, etc., manifest different responsibilities for different community foundations. Local conditions and the ecology of a community matter. But if we expand the narrative of activities in each role, remain nimble, creative, and community-driven, unexplored and unanticipated opportunities will emerge. We must only remain committed to our well-established ideals -- local identity and commitment, participation in a broader philanthropic industry, and culturally-specific giving practices.

**Author’s concluding note: Essential readings for newcomers to the community foundation field**

The vast amount of literature on community foundations makes learning about the field’s most contemporary developments a daunting task – especially for busy professionals and volunteers. Through this research, which was in essence a literature review, I have been able to identify some of the most seminal readings in the field. I list them here as primers, **“the top 12 must-reads”**, for Board members and staff of nascent and emerging community foundations who need to learn a lot, quickly, about the journeys ahead of them.

- 1) Beyond Money and Grantmaking: The Emerging Role of Community Foundations
- 2) The Community Foundation Difference
- 3) The New Generation of Community Foundations
- 4) The Value of Community Philanthropy
- 5) Philanthropy and the Regeneration of Community Democracy. Kettering Foundation (2013).
- 6) On the Brink of New Promise: The Future of US Community Foundations
- 7) Principles for Community Foundations: Community Foundations of Canada
- 8) More Than the Poor Cousin: The Emergence of Community Foundations as a New Development Paradigm
- 9) Standing at the Crossroads: Community Foundations worldwide are at a critical juncture
- 10) A Crisis of Identity for Community Foundations
- 11) Local Mission – Global Vision: Community Foundations in the 21<sup>st</sup> Century
- 12) The Future of Community Foundations: A Transatlantic Perspective

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