

European Values - Promoting
Solidarity at a Time of Austerity.
What Role can Philanthropy Play?

A summary report based on discussions at a
convening in Brussels, Belgium
October 7-8, 2014

PHILANTHROPY
for
SOCIAL JUSTICE
and
PEACE

About the Working Group on Philanthropy for Social Justice and Peace

The Working Group on Philanthropy for Social Justice and Peace (PSJP) exists to increase the impact of grant making for social justice and peace work. It does this by developing tools and practices to advance this field of work; shifting the narrative in philanthropy to place social justice and peace at the centre; and supporting a network for practitioners across the globe.

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- Halima Mahommed, Independent Philanthropy Consultant (Johannesburg, South Africa)
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INTRODUCTION

This report presents a summary of the discussions that took place at a convening organized in Brussels on Oct 7-8, 2014 by the Working Group on Philanthropy for Social Justice and Peace (PSJP). The event was arranged in collaboration with the Network of European Foundations and the Even's Foundation (Antwerp) and was entitled *“European Values - Promoting Solidarity at a Time of Austerity. What Role can Philanthropy Play?”* The convening brought together a small group of individuals, from foundations and networks of foundations in Europe, interested in looking analytically at the underlying problems, reflecting on different approaches to tackling the problems and seeking to make a greater impact on the current difficult environment.

The meeting was conceived and designed based on findings of a survey carried out by the Working Group in 2013- 2014, which pointed to *“a lack of effective tools among European Foundations to manage the complexity of what is needed to address change, to tackle the EU system, to strengthen civil society, or to mobilize populations to engage with these issues.”* The survey further revealed a *“strong sense of powerlessness among respondents, ... in the sense that they feel alone with too few resources to tackle the depths of the problems properly. People complain of the lack of a widespread vision about what could be different.”*

Against this backdrop, the convening offered the opportunity *“to explore the ground and open the space for honest conversation”* on the context in Europe today and discuss the role of foundations and effective ways of working to make a greater impact on the Europe's current problems.

The objectives of this report are to present:

- the analysis emerging from the discussions about the context in Europe and what it means for philanthropy
- emerging ideas about effective strategies for philanthropy in the current context
- ideas emerging from the practitioners about what's needed to advance the conversation and thinking in philanthropy in addressing the current challenges

It is hoped that this report will provoke multiple and diverse responses, from philanthropy, to the opportunities presented in the current crisis.



SKETCH OF THEMES EMERGING FROM DISCUSSIONS AT THE CONVENING

Understanding the Context


Keynote speaker Jordi Vaquer, Executive Director of the Open Society Initiatives for Europe helped to layout the context of the crisis facing Europe today and provoked a discussion around the challenges and opportunities for foundations. Vaquer spoke of three crises in Europe:


- **the economic crisis** which is manifesting as *“unemployment and welfare cuts in the south, resilient poverty in the east, uncertainty for the future in the west”*
- **crisis in democratic governance** wherein Europe is witnessing a *“weakening of the links between citizens and power”* manifesting as declining trust in political institutions, resentment against elites, in particular political elites
- and **the crisis in open society values** whereby *“basic values underpinning liberal democracy are questioned in theory and practice”*

Vaquer pointed to some of the contradictions in the three crises, for example the *“resilience of values in Ireland, Portugal and Spain, despite deep economic and democracy crisis; intolerance in countries that have suffered less, like UK, the Netherlands and France...”* and how the worst affected groups (such as migrants, younger generation, people in rural areas) *“are in some places driving the regression in values and the frustration with institutions but not in others”*.

For philanthropy in particular this calls for a deep analysis of the current crisis and an understanding of all its dimensions. Given the complex nature of the crisis, Vaquer warned foundations against making assumptions and against thinking that we know what vulnerable groups need better than they do, or to define problems for them.


Implications and opportunities for philanthropy


 **Status quo vs social change:** Vaquer suggested (and this was much discussed) that foundations are often *“trapped as status quo actors”*. Are foundations happy with the status quo? Is there an appetite for progressive social change? Even if there is an appetite, sometimes the heritage of foundations makes it difficult for them to be viewed as part of a new and emerging social order.

 **Local vs. European:** Participants searched for a deeper understanding of the relevance of working for change at the European level when the pressures of the crisis were so evident at the local level. While emphasis in this regard was on *“being curious”* and responding to the needs of the community locally, to be strategic it was necessary to have “Europe” on the Foundations’ agenda. *“If you don’t have it, you’ll be farther and farther away. If you have it, you will assess it, think about it.”*



 **Contested understanding of “European values”:** Both in Vaquer’s presentation as well as through an exercise conducted by the Even’s Foundation (reflecting on the values as understood by the citizens of Europe and by foundations themselves), it emerged that there was a need for us to be careful in understanding and applying the concept of ‘European Values’ as its interpretation was not only shifting according to context but also contested among various stakeholders. And yet universal values are an essential aspect of work for progressive social change.

 **Resilient Societies:** Supporting resilience in communities and in wider society are important aspects of the way forward. Vaquer pointed out that despite the hardships, there had been no serious violence, even in Greece and Spain. Additionally foundations could support and build on family coping mechanisms, local solidarities and existing welfare structures that were bouncing back to cope with the crisis.

 **New wave of social movements:** Attention was drawn to a new generation of activism that is bringing in new energy and dealing with new issues as well as old ones. There was a call for foundations to find such social movements and support them.

Effective strategies for philanthropy

Participants explored the shared experience in the room around what have they done differently to address the challenges facing Europe today, what new ways of working exist or are needed for greater impact of philanthropy on the current crisis.

Some of the existing strategies that participants found effective:

1. Influencing social policy innovation
2. Look to civil society actors and grantees for a positive vision
3. Listen to grantees working on the ground in terms of what skills they need
4. Movement building i.e. creating and supporting processes which educate a new generation of activists
5. Offer core, flexible and long term funding
6. Practice participative grant making, giving voice to small groups



Left to right: Zohra Moosa (MamaCash), Jenny Brotchie (Carnegie Foundation) and Nick Perks (Joseph Rowntree Charitable Trust), discuss effective strategies for philanthropy in the current crisis in Europe



In order to increase the impact of philanthropy in the current context, discussions focused on three aspects of foundation work:

1. *Who informs us:* Participants stressed the need to hear and recognize the voices of those who are marginalized in formulating strategies as well to focus on the “*progressive consensus*” and engage those who want to be part of the change process, such as journalists.
2. *How we work:* There was agreement among participants that ‘together is better’ and there is a need for collaboration both among foundations as well as with other mainstream platforms (unusual partners) that can help to leverage social justice issues with policy makers. (An example was cited of an initiative by MamaCash that has collaborated with the Guardian newspaper and initiated a portal on women’s rights on the website of the Guardian.)

Additionally, given the magnitude and complexity of Europe as well as the problems it is facing, it was suggested that working together and sharing learning across contexts (as opposed to everything coming to Brussels) would prove to be an effective way of working.

Further, participants expressed concerns around the fragmentation in the philanthropy community. As one participant said, “*We have a strong sense of ownership, of egos, we don’t want to share.*” Co-funding processes and aligning around a set of issues were recommended as ways of working together to increase the impact of philanthropy.



Participants at the convening in Brussels

Three embryonic initiatives were mentioned as exciting opportunities to have emerged from the European philanthropic sector and where efforts could further align for greater collective impact. These are:

1. An initiative on supporting social and citizens movements, critiques of the current model of development based on infinite growth, a critical view on our own internal organisational structures and decision making processes, and an awareness of aligning financial investments with core values of social justice and sustainability by the *Bewegungsstiftung* (Foundation for Social Movements)



- in Germany and the Charles Leopold Mayer Foundation (FPH) in Switzerland and France, working in partnership with the EDGE Funders Alliance .¹
2. An opportunity to partner with the OECD, which has expressed an interest in working with foundations to explore new solutions to wide range of social and economic challenges.²
 3. Foundation 3.0 is an initiative of the Foundation for Future Generations, joined by the Foundation de France. It questions the various fields of activity of our foundations - grant-making, endowment management and operations - targeting systemic change for sustainable development.³
3. *How we evaluate:* Discussions focused on the problematic evaluation trends in philanthropy. Emphasis was laid on clarity about the purpose of evaluation i.e. “are you evaluating for impact or are you evaluating for learning?”; clarity about who you are evaluating for- your donor, community or the foundation; as well as clarity on the unity of analysis. Participants stressed the need to evaluate together with partners/ grantees, to involve citizens, share results of the evaluation and to evaluate from the beginning of the project.

¹ The initiative is currently explore ways of building momentum for collaboration amongst like-minded progressive foundations . For further information on this initiative contact Nicolas Krauz at nicolas.krausz@fph.ch

² The coordinating group for this initiative includes: Carnegie UK Trust; European Foundation Centre; European Cultural Foundation; Fondation Charles Leopold; German Marshall Fund of the United States; King Baudouin Foundation; Philanthropy Ireland ; Robert Bosch Stiftung and Stavros Niarchos Foundation. The group would we very much welcome input from other Foundations. Anyone who is interested should get in touch with Jenny Brothchie at jenny@carnegieuk.org

³ For further information contact Tanguy Vanloqueren at t.vanloqueren@fgf.be



WAY FORWARD

In reflecting about how we can strengthen philanthropic work around these issues, four areas drew considerable interest in the discussion and it is hoped that multiple stakeholders within the philanthropic sector in Europe will pursue these, both collectively and individually:

1. *Knowledge production*: Participants stressed the need to collate, analyze and share knowledge that's already been produced and that which exists in the field.
2. *Alternative visions*: There is a thirst for good analysis of the current crisis of the kind Jordi Vaquer offered this convening, and for new narratives of a future Europe that can inspire progressive philanthropy. We should collate stories of what has worked from a variety of different countries and stakeholders and share them to inform our philanthropic strategies.
3. *Mapping of movements related to alternative vision*: Social movements are likely to be an important part of the future change agenda. It would be helpful to map civil society movements that are emerging across Europe and find ways connect them at a European level.
4. *Advocacy within the field*: There is not a need for the organisation of an additional set of regular meetings, but the space for a sounding board on social justice issues was recognised as being important. This could continue to offer the opportunities of shared analysis and practice, but should seek to include those foundations whose focus is in-country rather than working at the macro-European level. Equally, it continues to be important to add a social justice lens to European philanthropy more generally, and for events to be organised through the EFC - including at AGA and other convenings.



ANNEX A: PARTICIPANTS LIST

	Name	Organisation	Country
1.	Avila Kilmurray	Global Fund for Community Foundations	UK
2.	Barry Knight	CENTRIS, Webb Memorial Trust	UK
3.	Bente Roalsvig	Fritt Ord	Norway
4.	Chandrika Sahai	Working Group on PSJP	India
5.	Dharmendra Kanani	European Foundation Centre	Belgium
6.	Franz Karl Pueller	ERSTE Stiftung	Austria
7.	Gabriele Woidelko	Körber Stiftung	Germany
8.	Jenny Brotchie	Carnegie Foundation	UK
9.	Jordi Vaquer	Open Society Initiative for Europe	Spain
10.	Jörg Rohwedder	Bewegungstiftung	Germany
11.	Karen Weisblatt	Weisblatt & Associés	France
12.	Katherine Watson	European Cultural Foundation	Netherlands
13.	Lisa Jordon	Porticus	Netherlands
14.	Maria Orejas-Chantelot	European Foundation Centre	Belgium
15.	Marina Tabukashvili	Taso Foundation	Georgia
16.	Marjolein Delvou	EVEN'S Foundation	Belgium
17.	Mark O'Kelly	Barrow Cadbury Trust	UK
18.	Mona Hinz	Robert Bosch Stiftung GmbH	Germany
19.	Nick Perks	Joseph Rowntree Charitable Trust	UK
20.	Nicolas Krausz	The Charles Léopold Mayer Foundation (FPH)	France/ Switzerland
21.	Patricia Frias	Cariplot	Italy
22.	Peggy Sailler	Network of European Foundations	Belgium
23.	Sara Bensaude De Castro Freire	Network of European Foundations	Belgium
24.	Silvia Silvozzi	Network of European Foundations	Belgium
25.	Sophia Sakhanberidze	MamaCash	Netherlands
26.	Stefan Schaffers	King Baudouin Foundation	Belgium
27.	Stephen Pittam	Working Group on PSJP	UK
28.	Tanguy Vanloqueren	Foundation for Future Generations	Belgium
29.	Wendy Richardson	Global Fund for Community Foundations	Belgium
30.	Zohra Moosa	MamaCash	Netherlands



ANNEX B: EUROPEAN SURVEY ON PHILANTHROPY FOR SOCIAL JUSTICE AND PEACE

Introduction

At the Working Group on Philanthropy for Social Justice and Peace we have been concerned with the role of philanthropy in dealing with challenges of xenophobia and democratic instability that the current economic crisis has brought with it in Europe. We feel that these issues pose pressing concerns for foundations that are advocating a social justice and peace agenda. We are therefore interested in a conversation with those foundations that are grappling with these issues to together think about how we can best work with foundations which are:

- looking analytically at the underlying problems,
- reflecting on different approaches to tackling the problems,
- seeking to make a greater impact on the current hostile environment.

With this in mind we reached out to 35 foundations in Europe. These included those we knew through their work, and those we were able to reach directly or via recommendations through the NEF, EFC, DAFNE and Ariadne networks.

The purpose of the survey was to understand better the current context and the work foundations (concerned with social justice and peace issues) are currently engaged in.

Thirty-three foundations responded to the survey.

Who filled out the survey?

Most commonly, the Executive Director responded to the survey. The distribution of results is in the following table.

Which of the following best describes your position?					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Board Member	2	6.1	6.1	6.1
	Executive Director	17	51.5	51.5	57.6
	Manager/Director	9	27.3	27.3	84.8
	Programme Officer	5	15.2	15.2	100.0
	Total	33	100.0	100.0	



Limitations of the data set

At 33, the number of responses means that we limited in what we can do with this survey. The numbers are too small for far-reaching statistical analysis. Only 19 of the 33 gave information on the more qualitative aspects of the survey, commonly skipping the questions. This means that the analysis of some sections below is based only on 19 responses. It was noteworthy that these responses tended to come from those who were more enthusiastic about coming to a meeting.

Notwithstanding this limitation, the results are useful to give some basic profile of groups we want to have at a meeting.

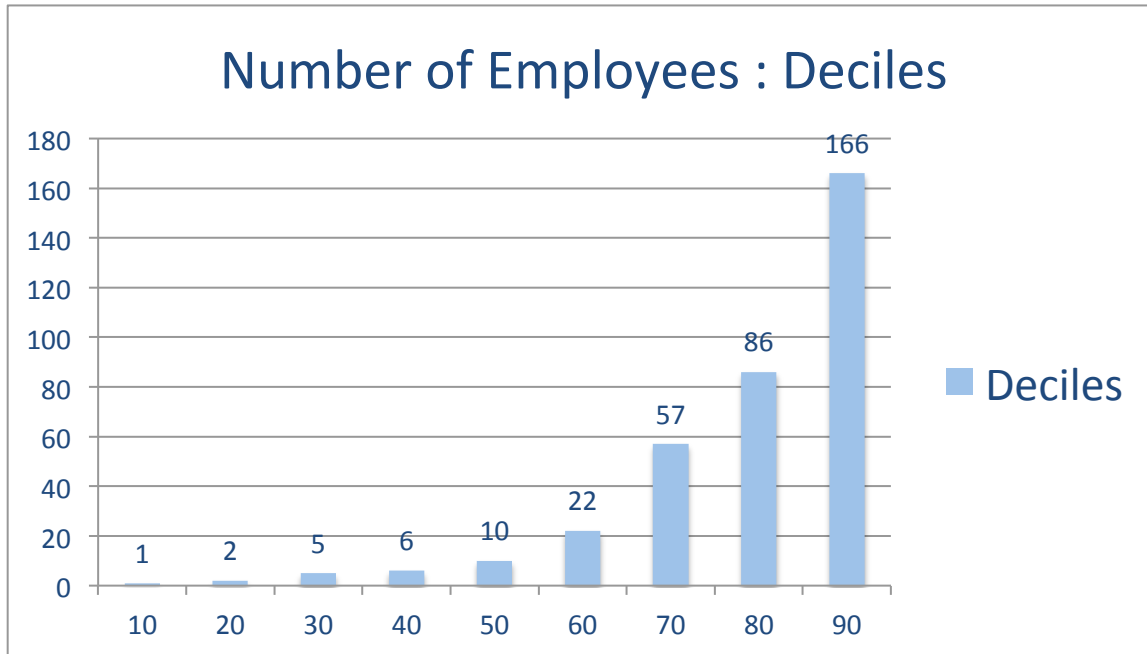
Types of foundations

Most of the foundations are a hybrid between grantmaking and operational foundations. The frequency of each is shown the following table.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No answer	1	3.0	3.0	3.0
	A mix	18	54.5	54.5	57.6
	Grantmaking	13	39.4	39.4	97.0
	Operational	1	3.0	3.0	100.0
	Total	33	100.0	100.0	

Size

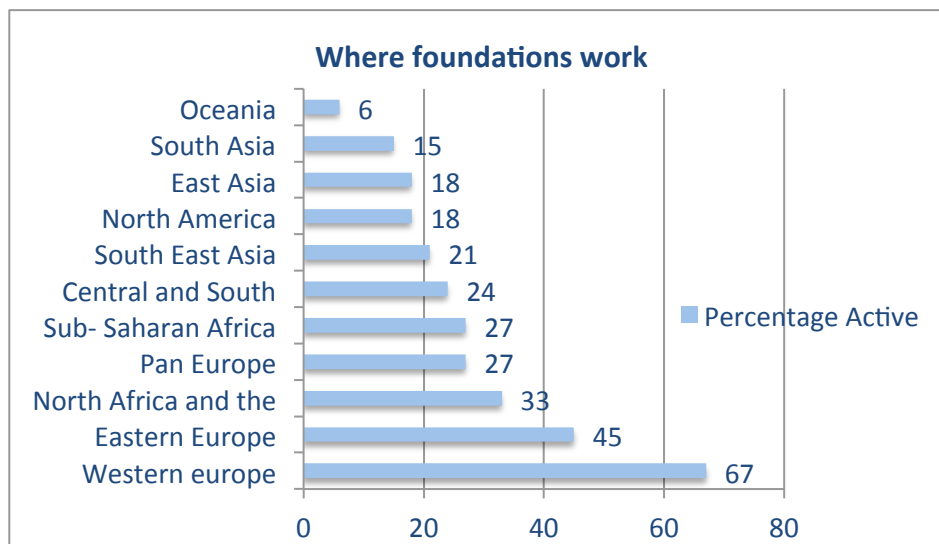
Looking at the measure of size (number of staff and budgets), the group is widely scattered. The following chart shows deciles on staff size. The median staff size is 10, but there is a world of difference between foundations at the bottom end of the distribution and the top.



A similar distribution can be found on budgets, ranging from very small to very large.

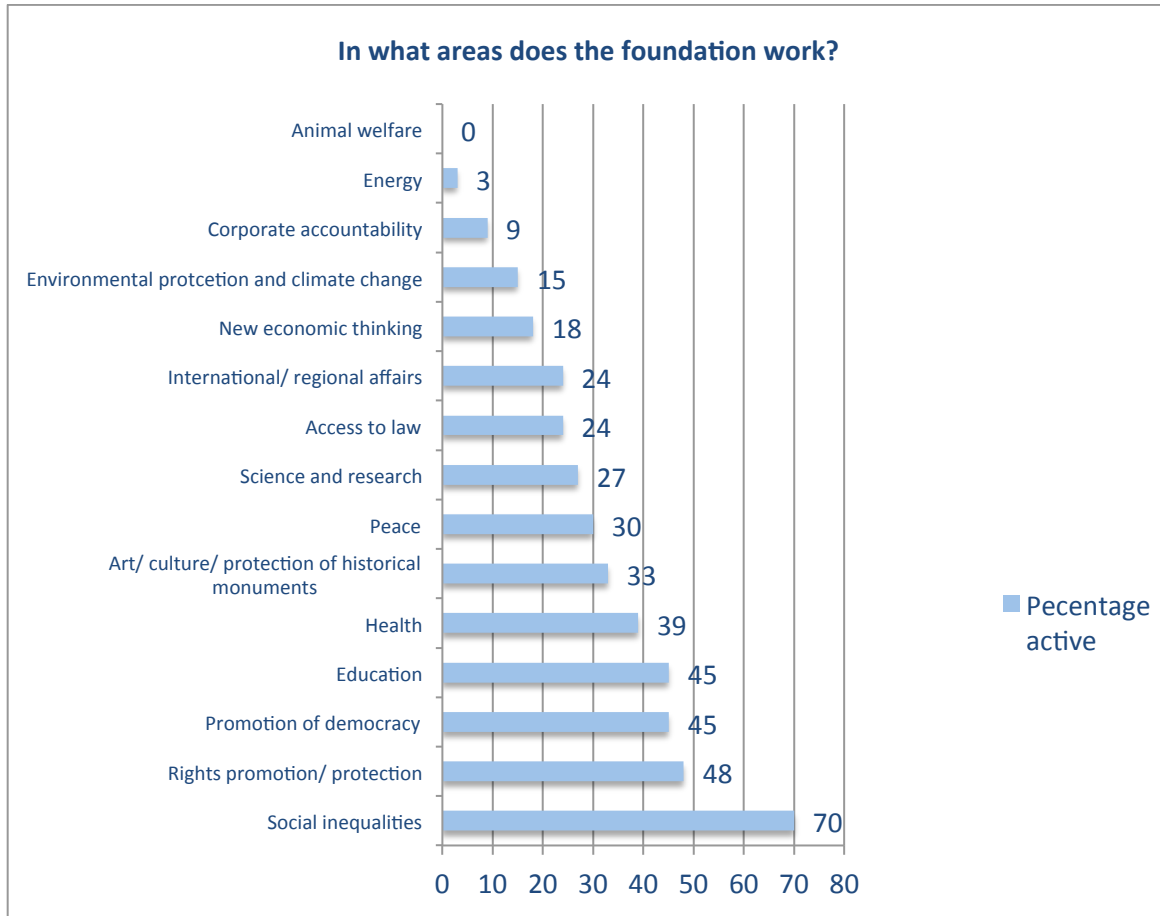
Where foundations work

We asked where the foundations operate. Results are in the following bar chart.



Areas of work

We asked about what topics the foundation was working on. The answers are in the following bar chart.



It is clear from the chart that we have been successful in attracting people whose interests are firmly in the sphere of social inequality, rights, and peace. That means we have a constituency to work with.

Mission

The missions of the various foundations differ widely. Nineteen foundations gave information about their mission.

The largest group focussed on women:

'[The foundation's] mission is to assist CSOs, specifically to women's CSOs, to play an active role in the processes of democratization of society and to contribute to equality, justice and respect to human rights by supporting the civil society development with financial opportunities.'

'... is a foundation at the state level based in Barcelona, which promotes the rights, empowerment and leadership of women in Latin America and the Caribbean and



Spain, by mobilizing resources for strengthening their organizations, networks and movements.'

'Courageous women and girls' human rights organisations worldwide need funding and supportive networks in order to grow and transform their communities. [The foundation] mobilises resources from individuals and institutions, makes grants to women's and girls' human rights organisations, and helps to build the partnerships and networks needed to successfully defend and advance women's and girls' rights globally.'

'[The foundation's] mission is to support and sustain a feminist political platform against war, nationalism, racism, militarism, all kinds of discrimination and violence against women.'

'The mission of [the foundation] is to empower women in Georgia to protect their rights, offer financial and technical support towards their full self-realization and participation in society, and develop and sustain feminist philanthropy throughout Georgia.'

Two gave priority to peace building and conflict transformation

'To promote social change and peace building'

'We are a Quaker trust which seeks to transform the world by supporting people who address the root causes of conflict and injustice.'

Two stressed harmonious relations in open democratic societies:

'Living together harmoniously in Europe'

'[The foundation's] vision is of an open, inclusive and democratic Europe in which culture is a valued and key contributor.'

One worked with Roma:

'The mission of the [the foundation] is the integral socio-economic promotion of the Roma community on the basis of respect and support for their cultural identity. Our mission is to promote the access of Roma to rights, services, goods and resources on an equal footing with the rest of the citizenry.'

Another worked with sex workers:

'To strengthen and ensure the sustainability of the sex worker rights movement by catalyzing new funding specific ally for sex worker-led organizations and national, regional and global networks.'

Yet another, worked on social inclusion:



'Promoting social inclusion of people with achondroplasia'

One worked on environment:

'The Foundation supports the development of initiatives in Belgium and at European level that provide sustainable solutions through a « 4 P's » approach, altogether good for the environment (Planet), the well-being of all (People), a thriving economy (Prosperity), and with Participatory governance as a red line, today and tomorrow.'

There were a range of more general approaches focussing on poverty and inequality:

'To help the poor and sick of Dublin'

'Supporting the development of the North West of Italy in different domains'

'To promote equality and lessen disadvantage'

'To support efforts that promote a just, equitable and sustainable society'

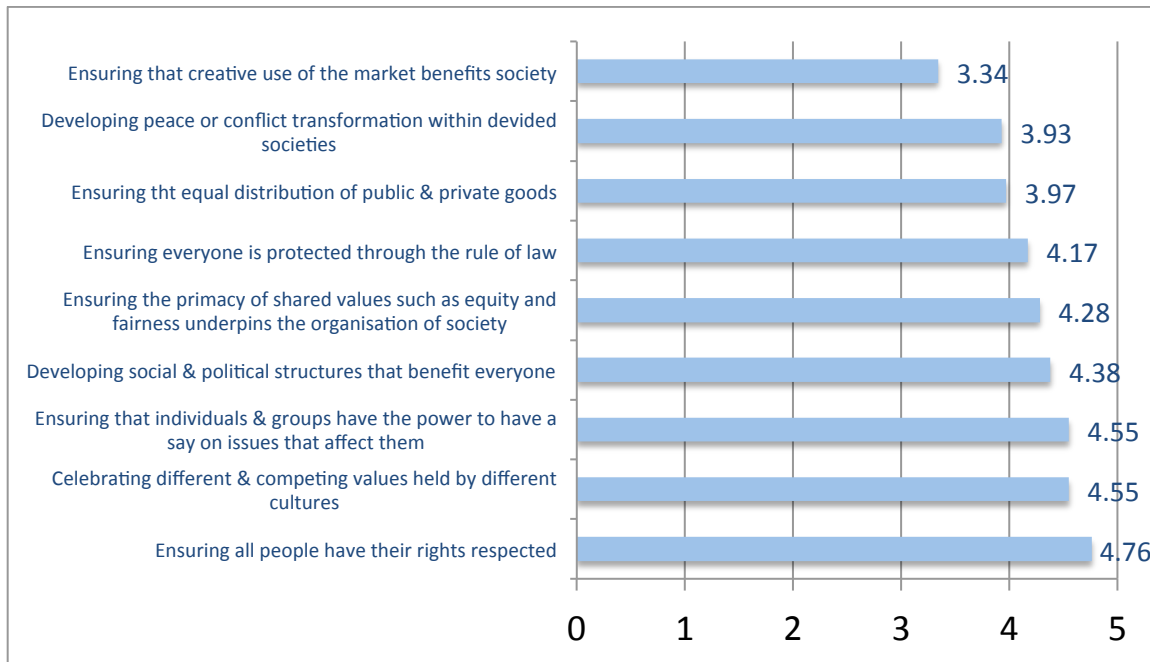
'We support initiatives that aim for development and renewal on a social, cultural and spiritual level.'

'To make a lasting difference in the lives of disadvantaged communities.'

'To bring humanitarian aid and promote human development, taking into account the Human Rights and the Millennium Development Goals in health, social and environmental, anywhere in the world, regardless of race, gender, age, nationality, language, politics, religion, philosophy or social standing, looking at each person as unique, irreplaceable, and worthy of attention and care.'

Commonality in social justice

Notwithstanding the variety of foundations, notably in their size and the specificity of the missions, it is clear that they share social justice values. Using a set of criteria derived from the traditions paper (plus a question about peacebuilding based on work with Foundations for Peace), we asked foundations to rate how important the various items are on a five-point scale (from very unimportant to very important). Results are in the following bar chart.



As can be seen, the issue of rights has the highest priority and it is this characteristic that binds the group most closely together. Other factors are important. In common with other parts of the world, peacebuilding and using the market to benefit society are the lowest priorities in the group.

It is noteworthy that on one of the items above, namely the highest item on human rights, there was a significant difference between NEF members and non-members. NEF members were significantly less likely than others to rate human rights as being central to their work. There were no other significant differences between the groups on the social justice and peace criteria.

Examples

We gave people the opportunity to give an example of their work. Reflecting their missions, the examples were all very different though there is an underlying current of social justice running through all of them

Examples include:

- A participatory panel for senior citizens
- Creating the conditions in which migration policy could be fair to migrants and to established communities
- Soup kitchen
- Services for violence against women
- Efforts to bring full citizenship for Roma
- Combat stereotypes between migrants and local communities
- Improvement of the conditions in prisons



- Provision of paralegal advice for poor people
- Advocacy for human rights
- Organising for sex workers

Hurdles and quandaries

We asked people: 'What are the main difficulties you face in achieving outcomes related to democracy, social and economic stability, and peace in Europe?'

When it came to hurdles and quandaries in their work, the foundations that responded had much to say. There is a strong sense from the responses that they feel 'up against it' and their work is flowing against the tide.

Many mentioned the economic crisis and how this is making everything harder to deal with. This is not just a problem of resources, though many cite the lack of public money as a serious problem in addressing issues of poverty and inequality, but it is also a battening down of the hatches. Several mentioned a sense of powerlessness among populations, a weakness of community groups, but also a retreat from politics and engaging with public affairs. For their parts, governments appear to be retreating into their shells, focussing on economic matters at the expense of social ones (as one put it 'homo-economicus rather than homo-universalis'), and are unsympathetic to progressive social change.

The climate of opinion is hardening against the poor. While there is rising inequality, there is no concern with the consequences for Roma, for women and for marginalised groups. Racism and xenophobia are on the rise. The domination of vested corporate interests and a biased media mean that issues of fairness and equity have slipped down the political agenda.

One interesting strand of argument is the lack of effective tools among foundations – to manage the complexity of what is needed to address change, to tackle the EU system in all its Kafkaesque nature, to strengthen civil society, or to mobilise populations to engage with these issues. There is a strong sense of powerlessness among respondents, and this often manifests itself in the sense that they feel alone with too few resources to tackle the depths of the problems properly. People complain of the lack of a widespread vision about what could be different. There is no cadre of donors working together on these issues to address them. Some mentioned the lack of good evaluation tools to measure their success.

What would help?

We asked: 'What would help you to overcome problems and quandaries?' When it came to what to do about the problems, people had less to say and were less articulate.

There were broadly two sets of responses: those that looked outwards towards societal solutions and those that looked inwards and reflected on how philanthropy might change to address some of the problems.



Looking outwards, there is an important strand about doing things differently. There was a sense that, because what we have is not working, philanthropy had a particular role in developing new visions for society and thinking through methods of implementing those. There was a strand here about finding effective ways to reduce poverty and inequality and another about how to build the capacity of civil society. The issue of measuring success was an important dimension here.

Beyond the development of ideas, there was a second strand of increasing resource flows. Many people mentioned this. A strong theme was the importance of raising more money for human rights, and one person mentioned better use of EU structural funds for Roma.

Looking inwards, there was a strong theme of 'together is better'. There appeared to be two main dimensions to this. One was about the opportunity to share and learn from one another. The second strand was more action-based, with people seeking collaborations to change things. One interesting idea was for a champion to work with foundations to promote rights based approaches within philanthropy.

The responses to what people would like to get out of a discussion with peers were, not unexpectedly closely connected to how they would like to overcome the hurdles they faced in their work. Five main agenda items emerged:

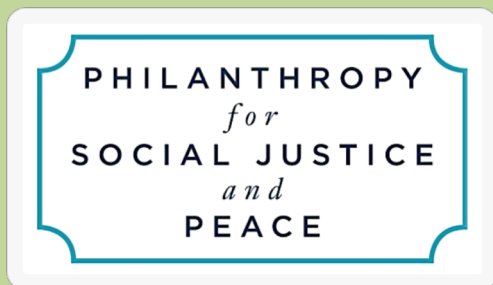
1. Peer sharing – learning what others are doing
2. Skills development, particularly in practical tools such as evaluation of impact measures
3. Peer collaboration – what can we do together
4. How can we develop new ways of working (e.g. how can we find a new economic model, effective strategies to combat poverty and inequality, dealing with xenophobia, how can we improve participation in society)?
5. How do we get more funders to work on human rights and related issues?

Barry Knight

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