

MAECENATA STIFTUNG

MEMORANDUM

Date 24 May, 2019
From Timo Unger
To Interested Parties
Re **Philanthropy.Insight**: Meeting on 23 May 2019 in Paris

On the margin of the EFC AGA 2019 a meeting took place at the Goethe-Institute of Paris on 23 May, 2019, to introduce and discuss the findings of phase 1 of the Philanthropy.Insight Project, directed by Rolf Alter and generously supported by the Carnegie UK Trust. These findings had been published beforehand and were made available to participants (see: http://web.maecenata.eu/images/MO-31_Philanthropy.insight.pdf). These were:

- Max von Abendroth, DAFNE
- Soma Barsen, OECD
- Rosalyn Benjamin, Stavros Niarchos Foundation Greece
- Filippo Candelo, Compagnia di San Sao Paolo, Italy
- Denise Greene, OECD
- Roy Virah Sawmy, Civitates
- Rachel Heydecker, Carnegie UK Trust, Scotland
- Barbara Luria Leopold, Center on Philanthropy and Civil Society, City University of New York
- Flavia Moscauolo, Compagnia di San Sao Paolo, Italy
- Hannah Stähle, Association of German Foundations
- Hannah Surmatz, EFC
- Leonie van Tongeren, Civitates
- Tobias Troll, EDGE Funders
- Emilio Rui Vilar, Fundacao Calouste Gulbenkian, Portugal
- Inga Wachsmann, Porticus, France
- Ruth Williams, Verband für gemeinnütziges Stiften, Austria
- Bettina Windau, Bertelsmann-Stiftung, Germany

Rebuilding and strengthening trust – including self-trust – were widely recognised as key challenges of the philanthropic sector. The proposed criteria of Philanthropy.Insight – Commitment, Public Purpose, Relevance, Performance and Accountability – and their underpinning qualities were seen by participants as a valuable instrument of a trust-driven philanthropic renewal. Comments and suggestions referred to reviewing the exact wording, the formulation of the questions attached to the qualities and ensuring compatibility with different cultural or religious

contexts. A number of valuable recommendations were taken note of. The methodology of using a category model was approved.

The intention to go far beyond an impact-driven assessment towards a stronger, better defined and more accountable role of philanthropy within civil society was applauded. In the same vein, it was stressed that the use of Philanthropy.Insight as an auto-evaluation framework as well as an external evaluation framework made sense. Another question raised concerned the frequency of the application of the instrument: Should it be used as a rather selective approach to evaluation, or will it be part of a continuous and circular evaluation schedule?

Support was expressed for Philanthropy.Insight to move beyond a European/North American scope and to cover not only the OECD space, but to reach out also to the global south, Asia as well as to religious philanthropy. It will also be key to identify a path that grants both sufficient leeway and autonomy to the diversity and the heterogeneity of the actors involved within the sector of philanthropy as well as opening a common space for the Philanthropy.Insight criteria to unfold their full potential. Communication was added as a vital factor for the project. Philanthropy.Insight was seen by all as a comprehensive tool for ordering the thoughts and actions of the eco-system of philanthropy. These contributions could considerably improve the basis for pro-active and confident communication strategies vis-à-vis partners, policy makers, civil society and the public at large. Moreover, it can work as supportive instrument to cluster strategic directions and/or to underpin contested decisions made.

Looking ahead, in phase 2 of Philanthropy.Insight, three central lines of action were identified to establish Philanthropy.Insight as a coalition of philanthropic actors working together for a trust-driven approach of philanthropy:

1. to demonstrate the practical value-added of the Philanthropy.Insight criteria by way of a substantial number of international case studies;
2. to further develop the instrument by way of a broader academic discourse. The Centre for the Study of Philanthropy and the Public Good at the University of St. Andrews (Scotland) was mentioned as a potential partner; others to follow;
3. to seek opportunities to disseminate the progress of the project and to engage with potential stakeholders and umbrella organizations.

The next steps will be

- for the project team to assess the comments and suggestions made in the course of the presentation and in a number of bilats during the EFC AGA;
- for the project team to draft a plan and budget for phase 2;
- for anyone interested to disseminate and comment on the paper presented;
- for the team to have conversations with potential funders and partners.