

COMMUNITY-LED NEEDS ANALYSES: CURRENT APPROACHES AND PRACTICE IN EUROPE



AN ECFI GATHERING OF COMMUNITY FOUNDATION PRACTITIONERS

11–12 September 2018, Hamburg, Germany

Background

This ECFI Thematic Meeting aimed to explore the topic of community-led needs analyses in the context of European communities and European community foundations. The goal of the meeting was to strengthen the capacities of community foundations to understand and be better equipped to address broader issues. The event allowed for sharing experiences from practice (what different community foundations have done, how they assess it now, and lessons learned from the process), and created space to capture current knowledge on community-led needs assessments and distil learning based on this experience. This report provides a summary of key issues raised in discussions.

Acknowledgements

We are grateful to the meeting hosts, the Korber Foundation, and for help from staff at the Bürgerstiftung Hamburg in organizing the event and to Cathy Elliott, MJ Consultancy, who contributed her extensive experience, facilitating the meeting and providing notes for this report. Much of the value of the meeting came from the participants who shared their own knowledge and experience and actively participated in collective critical analyses.

Gathering & Reporting on Community Intelligence



Participants from six countries shared their experience in gathering and reporting on community intelligence. They commented on their motivation, challenges they faced, and the results.

Below is a summary of key points raised by participants and followed by some common themes

>> Vital Signs, started in 2016 was a way of engaging stakeholders in order to develop a thorough and shared understanding of a wide geographic area with a range of challenges and needs.

Daniele Giudici – North Milan Community Foundation, Italy, http://www.fondazionenordmilano.org/comunita-vitali-english-version/

Partnering with the university offered the use of resources (including students) and academic rigour in the analysis of existing data and gathering of new data which helped the community foundation make the case to donors.

Beata Hirt – Healthy City Community Foundation, Slovakia **www.knzm.sk**

- Tuzla Community Foundation has worked with Vital Signs since 2015 and has built an expert group around the process involving researchers and volunteers. Jasna Jaserevic – Tuzla Community Foundation, Bosnia www.vitalni-znaci.fondacijatz.org
- >> The purpose was initially to generate conversations and to identify priorities for action. The resulting Hidden Dorset reports aim to inform, to encourage collaborative action and to inspire philanthropy.

Jon Yates – Dorset CF, UK https://www.dorsetcommunityfoundation.org/who-we-help/hidden-dorset-report/ >> The Vital Signs approach enabled structured conversations around critical topics and on gathering data in order to assess impact.

Danko Nikolic – Zaječar Initiative, Serbia http://www.zainicijativa.org

>> An initial challenge was to ascertain what data were available, which of them were relevant and then to define appropriate indicators.

Vlad Odobescu – Bucharest CF collaborator, Romania http://fundatiacomunitarabucuresti.ro/

COMMON THEMES FROM PRACTITIONER PRESENTATIONS:

- Collecting and sharing your community knowledge supports the three roles of a community foundation (as a grantmaker, as a philanthropy facilitator or centre, and as a community leader).
- Community knowledge, such as Vital Signs, benchmarks your work to measure impact.
- There is a need for quality and reliable data for your work.
- Collecting and reporting on your community knowledge gives the opportunity to demonstrate yourself as a community leader and an organization which is different to other charitable organizations.

- You need to ensure public discussions and conversations take place with communities.
- Sharing your community knowledge via reports, events and engagement with donors and communities proves your community knowledge.
- There is a journey to take from a statistical needs analysis (research report) to Vital Signs (research and community consultation/conversations) to community leadership and action (e.g. aligning with Sustainable Development Goals) to achieve social change as a community foundation.

THINGS TO THINK ABOUT WHEN PLANNING YOUR COMMUNITY KNOWLEDGE WORK:

- Difference between doing own research to employing someone doing your research – the cost, your time, the knowledge you have in-house or that someone else has, e.g. a university.
- >> The difference between community perceptions or opinions and the statistics.
- The challenge of using credible and useful data whilst telling the story of your community based on citizens' concerns and aspirations as well as your research.

- Choosing the right partners to support you and verify your findings.
- Being credible and protecting your reputation whilst putting out research and consultation results to start a conversation and deliver your work.

OPEN SPACE GROUP DISCUSSIONS I

Participants then considered topics for Group Discussions and agreed on four:

- >> How do you collect, utilize and share data?
- >> How do you create a participatory process in your community knowledge work?
- >> What do you do with your report when it is published?
- >> How will this work for my country?

Below is a summary of key points that were raised.

>> How do you collect, utilize and share data?

- Use and analyze existing data and lay over community voices to create a Vital Signs report/project or similar document.
- Consider types of data to use via analysts and statisticians.
- Look at all indicators available, e.g. if you have 170 available to you, then choose 10–20 for your work.
- Data collection approaches can include volunteers and YouthBank.
- Experts should be involved to share information and verify data.
- Report on some statistics every 2–3 years as they may not change every year.

 Questions: Is there training available for the Vital Signs methodology? Yes, via Community Foundations of Canada (CFC).

http://communityfoundations.ca/ vitalsigns/international-vital-signs/

 Question: Can your national network provide your data or access to data sources, or can you find data by working with other community foundations? In Canada CFC provides the baseline data for participating community foundations, and UK Community Foundations (UKCF) has agreed a deal with a company for access to a database of many data sources which community foundations in the UK buy into for baseline data (the more participants, the lower the price).

>> How do you create a participatory process in your community knowledge work?

- Hybrid process needed.
- Independence is important for credibility.
- If we give everyone a voice, there is a risk in them saying things that don't fit with our plans and values. Issues can be different in different areas, there are politically diverse views. Need to maintain and assert your values as community foundations.
- Who can participate? Donor giving group can give and vote, partners can be experts and verify data, YouthBank can collect information and give a young person's perspective, universities give credibility, data and expertise – the community foundation must be the intermediary.
- Sometimes it is difficult to ask people to engage – use the right people to interview or engage with the right people.
- Start with something to be proud of what are the good things that are going on, or ask people about their hopes and aspirations.

- Grading social issues A to E can work to create a conversation, but can also create a negative view of an area – community foundations can choose to grade or not – it is their view.
- Create and work with focus groups by social theme and geography.
- Hold an event or conference to test findings and prioritize issues or social themes to focus on as a community foundation, especially when your research has identified a big or broad topic or when the social theme or issue is not your specialism.
- Influence your Board to influence external stakeholders, such as local politicians.
- Use an open source website to share all your research and findings to create transparency and accountability.

>> What do you do with your report when it is published?

- Make sure your report does not sit on a shelf – it should inform your work and PR.
- Is your report focused enough to have a conversation and engage?
- How do you move from your general report to focus on priorities? Should you change your mission? Your findings will guide what you should prioritize.
- You should listen to the data, but maintain your role and mandate as a community foundation – there is a priority to focus on priority needs/issues and gaps in information.
- Engagement with stakeholders should focus on themes and priorities, e.g. politicians, at the right time.

- What is your role as a community foundation? Should you engage, convene and advocate? By area, sector or demographic? Create equality in neighbourhoods.
- You should decide when and how your findings inform your work to be a grant-maker, philanthropy centre or community leaders, including lobbying or campaigning.
- Use technology to engage and share information with your stakeholders and community.
- Stage events, e.g. the Munich Sustainability Congress.

>> How will this work for my country – in particular where it has not been done before?

- Explore what your community foundation is for based on your community knowledge.
- Independence in a community foundation's community knowledge work is a priority.
- Adapting Vital Signs for your country must work for your country, but ideally connect back to Vital Signs as a brand and community foundation initiative.
- The name of your community knowledge work needs to work for your country, for example: 'Vital Communities' in Italy, 'Mirroring our community' in Hungary and 'Citizens' Barometer' (working title) in Germany.

USING AND SHARING YOUR COMMUNITY INTELLIGENCE

The UK Vital Signs experience



Cathy Elliott, former Chief Executive of the Community Foundations for Lancashire and Merseyside and 'founding Chair of UK Vital Signs from 2012–2016', shared her considerable experience of implementing Vital Signs at a national level.

>> Vital Signs becomes an operating system.

Our learning

- Learn from others, but adapt to your country's use.
- Ensure Vital Signs works for everyone: large and small community foundations in urban and rural areas, rich and poor areas.
- **Reduce costs by sharing resources,** e.g. neighbouring community foundations should be open to sharing the costs of researchers, printing and marketing.
- Protect the brand and content quality to ensure a good reputation.
- Agree common data sources but be flexible to everyone's needs.
- Co-design and learn together as community foundations.
- Fund Vital Signs every year as it will become essential from reserves, grants, etc.
- Profile Vital Signs work to demonstrate benefits it is not just a report!
- It takes time: it took 6 years for 50% of the UK network to join!

COMMUNITY FOUNDATIONS OF CANADA & SUSTAINABLE DEVELOPMENT GOALS (SDGs)

Vital Signs and the Sustainable Development Goals



FONDATIONS COMMUNAUTAIRES DU CANADA

9 September 2018

Alison Sidney, Coordinator of Outreach & Special Projects with Community Foundations of Canada, described how Vital Signs had evolved there with particular reference to integration with the SDGs.

- SDGs are a new approach and give a new language to frame our community knowledge work.
- A way to talk about your social change goals in communities with or without indicators.

- As an internationally recognized tool SDGs provide a way to talk to local and national government and the private sector about aligning your work together.
- SDGs give you the opportunity to highlight the goals you are working on, demonstrating action from your community knowledge.
- SDGs link with quality of life and provide new programme and donor opportunities for community foundations.

SUSTAINABLE MUNICH



Petra Birnbaum, Munich Community Foundation, described a process of engagement with the City Council around the SDGs.



The Munich Sustainability Initiative (MIN) consists of more than 40 civil society organizations that are engaged in diverse aspects of sustainable development in Munich. As a platform and collective voice for

NGOs, economy and science in matters of substance and organization, it offers stakeholders a structure to network and commit themselves to a sustainable urban society. Following a commitment by the City Council to put into effect the 17 Sustainable Development Goals (SDGs) of the Agenda 2030 in a participative process with the local populace, MIN has linked them to the most urgent challenges to the city and established eight working groups with the aim of fostering longterm cooperation among stakeholders.

The Munich Community Foundation is playing an important role by hosting a congress in February 2019 and initiating a participatory process, and encouraging the participation of civil society groups to establish a strategy of sustainability for Munich.

Support available for integrating SDGs in community foundation work in Europe

Representatives from the Academy for the Development of Philanthropy, based in Poland, reminded participants of the Global Challenges Local Solutions fund, which offers support to community foundations to help them solve global challenges at the local level and to connect their work to the SDGs. Examples of actions taken have been published in the brochure 'Change comes from the bottom up.' http://www.localsolutionsfund.org/european-grant-competition/

TALKING POINTS: USING THE REPORT – WHAT IS GOOD PRACTICE?

Below are some questions and suggested answers that arose from the presentations.

>> How often should you report?

Regularly to keep the conversation going with stakeholders and the community. Publish a full report or broad data every three to five years and in between share special topic or thematic reports or impact reports. Some data does not change that often.

>> Who are your target audiences?

Donors (face-to-face meetings, requests for funding, designing or revising their grant/fund schemes); policy officers and government; programme and funding partners; grantees & NGOs; businesspeople and the private sector; local citizens / general public; local and national media.

>> What should the response be?

The community knowledge you share should stimulate discussions and inspire people to respond and get involved.

>> Use and format of the report – is a printed report too traditional?

A printed report works well for certain stakeholders, such as policy makers, for events to demonstrate your work and for certain generations in communities. An electronic document in an accessible forma t that is easy to read is a standard way to report. Accompanying content, such as films or podcasts, and storytelling formats, such as social media, are effective. Ideally, data information should be available online.

>> How do you share the report?

Use of films; identification of 'killer' or 'shocking' statistics which the media will want to cover (balance out with grantee or philanthropy stories of how an issue is being tackled). You must however protect the integrity and independence of your community knowledge work.

OPEN SPACE GROUP DISCUSSIONS II

Topics for the second Open Space discussions were:

- » Getting started
- >> How do you present your report to your community?
- » Use of technology

Key points arising are summarized below:

>> Getting started

- Start with the 'big picture' and undertake broad research across social themes and your geography to determine the biggest issues and most interesting findings. From there consult or begin citizen conversations to delve into / explore initial findings and gain the participants' feedback and suggestions on priorities. Then you can research priority social themes or geographies for this or future reports and community knowledge work.
- Find out what you do and do not know and verify the current work you have been undertaking. Be aware of your blind spots. There may be gaps between your research findings, consultation results and the work you currently do. You need to consider what to do about this. For example, you have focused your programmes on children & young people when the research and consultation says the priority is in fact older people. What do you do next?
- Be brave in making decisions with your Board on deciding on the focus of your community knowledge work, e.g. Vital Signs, and how the findings will inform your future work as a community foundation. Your community knowledge work needs to bring you credibility and independence.
- Be flexible with your approaches to gathering community knowledge and do not create an exact science. You need to work with the data and the community interest available. A balance of research and community consultation is desirable, but work with what you have got. If your community work is more informed by community consultation due to a lack of data, begin there.
- Decide how you will talk about disadvantage. A locality may well know it has big social issues. Be positive in your language – social change and aspirations as well as recognizing the issues. If you need to talk further about a big social issue, talk to experts and community leaders who work in that area/field and ask them how you should talk about the issue.

- Follow your community foundation's values and your city or locality's motto.
- Your detailed report should sit behind your accessible and easy-to-read public report to demonstrate the background research.
- Be prepared to deal with the facts of data disagreeing with the perceptions from consultations, e.g. statistics about

crime in a wealthy area show that crime is low, but the residents think it is high.

- Link Sustainable Development Goals (SDGs) to give a focus and create social action.
- Explore bottom-up approaches on creating goals, setting priorities and beginning new work, e.g. a participatory process.

>> How do you present your report to your community?

- Keep your community knowledge work within your community foundation – protect the brand of your knowledge, such as Vital Signs, as it demonstrates the community foundation's independent expertise to then be shared publicly.
- There are a number of ways to share the format as shared previously, including printed format, events, films, Facebook, newsletters, etc.
 A public presentation of the report can be beneficial to give citizens the opportunity to discuss findings, themes and give feedback.
- Ensure a positive presentation of your report to engage and continue the conversation with your community to create social change. Grading of

social themes A to E via Vital Signs works for some community foundations to prompt discussions on issues, but for other community foundations grading creates negative views and is not helpful for an area which already knows there are big issues. Listing or highlighting citizens' concerns and citizens' aspirations is another way.

 You can use your community knowledge to sell or promote the community foundation to your stakeholders.
 Outlined in a professional format, your community knowledge demonstrates the community foundation as an expert and professional organization that can tap a rich pool of knowledge and experience and that distinguishes it from other charitable organizations.

>> Use of technology

- You need to know the data you want to collect.
- For quantitative research use online search engines, data licences to access a national or local database and make formal requests for data to universities or government.
- For qualitative research use online surveys, results from consultations or citizen events and interviews.
- Consider using Tableau or Google Analytics as a tool.

- Know your narrative and early research results to ask the right questions in consultations and at events.
- Be professional in gathering and checking your data for credibility.
- Present data via film (e.g. YouTube) or infographics (e.g. Piktochart or Canva).
- Promote conversations or consultations, findings and requests for feedback via social media, and even live stream events and citizen discussions.

TAKING OUR LEARNING & PUTTING IT INTO PRACTICE

>> Grant researching against your community knowledge findings

- You need to be open-minded to have flexibility in your grant-making based on your community knowledge findings and to fund new projects and end funding for other projects. You need to ensure your work is acceptable to the applicant as well as in line with the aims of the community foundation.
- You need to consider supporting communities and organizations for the long term if you choose to focus on specific social priorities that need longer-term support to achieve social impact. This means more sustained funding at a deeper level, for longer, moving away from broad, open funding schemes.
- Explore new partnerships via your research and consultation work to verify your findings and support your community foundation, especially if moving into a new area of work.
- Explore briefing and training opportunities on community knowledge and new areas of work for the team and your Board to ensure effective delivery of your work.

Working on and developing community knowledge practice as a movement, including ECFI's role in community knowledge practice

- Share case studies of work in community knowledge, e.g. Vital Signs and SDGs, to improve practice across community foundations internationally. This includes stories of success and failure, how to report and what happens after you have reported and shared your community knowledge.
- Explore a common time of year or date to share community knowledge publicly across Europe to create a movement,

e.g. as the Canadian Movement and UK movement have done in sharing their Vital Signs reports during the first week in October.

 Advocacy work is needed at a country and European level to support community foundations with the development of community knowledge work, especially for countries without a national membership body.

- ECFI has committed to keeping Vital Signs and SDGs on the agenda for future forums, peer learning and in its newsletter.
- Ensure that best practice sharing works across a number of languages. For example, the UK Vital Signs toolkit was adopted by the Italian movement for its Vital Signs.
- Support is needed to help community foundations take a lead role in gathering and understanding intelligence about their local community.
- Consider establishing an on-line peer group for sharing of good practice across Europe, possibly in conjunction with Community Foundations of Canada and UKCF.and UKCF.

- Attendees were encouraged to apply for ECFI peer exchange grants.
- Recommended for this community knowledge peer forum to meet once a year.
- Community foundations working on community knowledge are encouraged to attend Community Foundations of Canada's Vital Signs conference session and masterclass every two years – the next one in June 2019. International bursaries are available from CFC on application.
- More ECFI masterclasses and peer learning forums would be welcomed in the future on aspects of community knowledge work..

>> Now you have your research and community consultation results, what next?

- A community foundation's community knowledge work should be well informed.
- Public information should be a positive message and about how to improve an area or tackle a social issue.
- Your philanthropy or funding 'ask' needs to be thought through and included in your community knowledge work, such as a Vital Signs report. Does your report help you recruit a new donor or request funding? Have you decided to present your work by social theme

or geographic prioritys to then secure new donors and funding against those priorities? Or does the report present your community knowledge and then give the opportunity to discuss a donor's interest based on your findings?

 It takes time to develop your community knowledge work – your community foundation, including your Board, will learn from from each report and then decide how you work with stakeholders, donors/funders, NGOs/charities and citizens.

- Share your social change goals in your work – be an advocate.
- Be prepared for negative feedback and comments – your data or chosen social priorities might be challenged

 make sure your decisions and public information have been researched and verified. Negative responses might suggest that you should update your data or campaign/lobby for policy change, change the views of donors or improve the work of government.
- Ensure you know what your community knowledge work is saying about you as a community foundation, e.g. 'we care,' 'we have the right to talk about this as strategic philanthropy, etc.
- Your community knowledge becomes your operating system for grant-making and philanthropy advising to donors for their funds, securing new donors and funding, media work, social impact reporting and community engagement work.

AGENDA

TUESDAY, 11 SEPTEMBER 2018

Meeting venue: Körber Foundation, Kehrwieder 12, 20457 Hamburg, Germany

DAY ONE: GATHERING & REPORTING ON COMMUNITY INTELLIGENCE

Arrival from 9.20 a.m.

9.20 a.m.–9.45 a.m.:	Networking and informal sharing of information Participants are invited to bring along printed copies of their Vital Signs, community needs assessments and research to share with participants.
9.45 a.m.–10.00 a.m.:	 Words of welcome European Community Foundation Initiative Meeting the host foundation – Körber Foundation Hamburg Community Foundation
10.00 a.m.–10.10 a.m.:	Short introduction of participants
10.10 a.m.–10.20 a.m.:	Overview of the two days by Cathy Elliott, Meeting Facilitator

EXPERIENCES OF GATHERING & REPORTING ON COMMUNITY INTELLIGENCE

10.20 a.m.-11.05 a.m.: Actual experiences made in gathering & report on community intelligence Why did you choose to produce a community-led needs analysis report? What were the challenges & opportunities in gathering the intelligence, what were the results, e.g. a report, new community engagement, an event or a new donor?
1. Daniele Giudici – North Milan CF, Italy
2. Beata Hirt – Healthy City CF, Slovakia
3. Jasna Jaserevic – Tuzla CF, Bosnia
4. Jon Yates – Dorset CF, UK
5. Danko Nikolic – Zajecar Initiative, Serbia

6. Vlad Odobescu – Bucharest CF collaborator, Romania

11.05 a.m.–11.30 a.m.:	Question & Answer session – How do you deliver your work? Question & Answer session with the presenters
11.30 a.m.–11.50 a.m.:	 Suggesting & Voting for Open Space topics on gathering and reporting on community intelligence for Sessions 1 & 2 today Planning our group discussion topics with participants suggesting and voting for group discussion topics for two sessions today. Sample topics: a. How do you start a community needs analysis process, who needs to be on board? b. Challenges in gathering and combining the data c.How can you improve the process next year/time? d. Working across a country on a Vital Signs / community needs project
11.50 a.m.–12:50 p.m.:	Open Space session 1 on gathering and reporting on community intelligence Participants choose a group to join to discuss a chosen Open Space topic. One person takes notes, ideally electronically. One lead person takes responsibility for the group and stays for Sessions 1 and 2.
12:50 p.m.–1.45 p.m.:	Lunch break
1.45 p.m.–1.50 p.m.:	Review of the morning & overview of the afternoon session by Cathy
1.50 p.m2.20 p.m.:	Feedback from Open Space session 1 (5-min. slot from each group leader). Input from other participants invited.
2.20 p.m2.40 p.m.:	The Canadian experience & SDGs (Community Foundations of Canada) Presentation and questions
2.40 p.m3.05 p.m.:	 Adapting the Canadian Vital Signs model or SDGs for your work: Petra Birnbaum of the Munich Community Foundation will speak about SDGs and the process they are involved in with the local council. Cathy Elliott on developing a model for the UK Cathy was the founding Chair of UK Vital Signs from 2012 to 2016, working with 14 community foundations in the UK to adapt the Canadian model for the UK. Ulrike Reichart - Ulrike leads the programme for community foundations in Germany within the Association of German Foundations and will talk about adapting Vital Signs for the German community foundation movement, which aims to lead to the first Vital Signs reports in Germany in October 2019.

3.05 p.m3.20 p.m.:	Question & Answer session with afternoon presenters
3.20 p.m3.35 p.m.:	Tea/coffee break
3.35 p.m.−3.55 p.m.:	Suggestions & voting for Open Space topics on gathering and reporting on community intelligence for Session 2
3.55 p.m4.45 p.m.:	Open Space Session 2 Opportunity for participants to join another group to discuss a second topic they are interested in. A lead person takes responsibility for the group, including note taking, ideally electronically.
4.45 p.m5.10 p.m.:	Feedback from each lead from the Open Space session groups
5.10 p.m.–5.20 p.m.:	Recommendations from the Open Space sessions & Agree priorities for day two
5.20 p.m5.30 p.m.:	Reflections on day one
5.30 p.m7.00 p.m.:	Free time
7.00 p.m9.00 p.m.:	Reception dinner – Hamburg Community Foundation BürgerStiftung Hamburg Schopenstehl 31, 20095 Hamburg, Germany

WEDNESDAY, 12 SEPTEMBER 2018

DAY TWO: WHAT'S NEXT? USING AND SHARING YOUR COMMUNITY INTELLIGENCE

Arrival between 8.45 and 9 a.m. to network and share information

9.15 a.m9.25 a.m.:	Overview of the day and the agreed priorities from day one
9.00 a.m.–9.15 a.m.:	Presentation and Q&A of the Grant Programme: Global challenges, local solutions of the Academy for the Development of Philanthropy, Poland

MORNING SESSION 1: USING & SHARING COMMUNITY INTELLIGENCE

9.25 a.m.-9.50 a.m.: What next? Using & sharing your community intelligence Discussion on what you do with your Vital Signs or community needs assessment reports. Vlad Odobescu on work in Bucharest

- Beata Hirt on work in Slovakia
- Examples from Canada

9.50 a.m.–10.05 a.m.: How do you deliver your work? Question & Answer session with the presenters

MORNING SESSION 2: TAKING OUR LEARNING & PUTTING IT INTO PRACTICE

10.05 a.m.–10.30 a.m.: 	Taking learning into practice: voting on group session topics for Open Space session 3
10.30 a.m.–11 a.m.:	Tea/coffee break Voting on topics to discuss in one Open Space session
11.00 a.m.–12.00 p.m.:	Open Space session on chosen topics to take learning into practice Participants choose a group to join to discuss a chosen Open Space topic. One person takes notes, ideally electronically. One lead person takes responsibility for the group.
12.00 p.m12.30 p.m.:	Feedback on Open Space sessions
12.30 p.m.–1.00 p.m.:	Reflections on day two and actions from the meeting
1.00 p.m2.00 p.m.:	Lunch
2.00 p.m.:	Meeting ends

COMMUNITY FOUNDATION PRACTITIONERS

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