

## *Chapter 19*

# **Community Foundations: Agility in the duality of foundation and community**

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Differentiated from either individual giving or endowed private foundations, the community foundation presence in organised philanthropy offers a distinctive opportunity to see philanthropy in the round: from the perspectives of multiple donors, 'community' and recipients. Although the definition of a community foundation is evolving as new adaptations emerge, the original model refers to an independent, publicly accountable grantmaking body that is controlled by community members, derives its funds from multiple sources – including individuals, governments, corporations and private foundations – and, through its grantmaking and leadership, seeks to enhance the quality of life in a specific geographic locale (see Graddy and Morgan, 2006; Ostrower, 2007; Thompson, 2012). The core purpose of a community foundation can be expressed both philosophically and functionally as 'an institution that seeks to be a central, affirming element of the community, *foundational* to the places it seeks to serve' (Mazany and Perry, 2014: x). That 'service' is envisaged to cover a spectrum of ideas, including: being reflective of, and advocating for, a locality's philanthropic needs and preferences; responding to, seeking, and supporting multiple donors for that locality; stewarding and distributing funding for community needs; and building bridges among different groups within a community (Daly, 2008; Charles Stewart Mott Foundation, 2012). The way in which community foundations cast 'community' differs

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widely; it can range from very specific geographic locations, to more abstract ideas associated with 'belonging' and 'sense of place' (Jung et al., 2013).

Originating in the US in a century ago, community foundations have experienced major global growth. This has been particularly noticeable over the last two decades: around 74 percent of community foundations were established within the last 25 years (Community Foundation Atlas, 2015). With around 1,800 community foundations currently in existence, they can be found in over 50 countries and cover every continent, except Antarctica (Charles Stewart Mott Foundation, 2012; Community Foundation Atlas, 2015). Notwithstanding the old stereotype that community foundations are the 'poor cousins' (Hodgson and Knight, 2010) in the family of philanthropic organisations, they are emerging as a major force: in the US, of the 100 biggest grantmaking foundations, 16 are community foundations (Sacks 2014); in the UK, community foundations are amongst the largest grantmakers to the nonprofit sector (Pharoah, 2011); while in Germany, where community foundations have only been around since 1996, they already have a combined endowment of €265 million (Initiative Bürgerstiftungen, 2014).

To illustrate and better understand community foundations, their roles and challenges, a number of metaphors have been applied. These range from 'agile servant' (Magat, 1989) and 'glue' (Rogers and Keenan, 1990), to 'matchmaker' (Daly, 2008; Graddy and Morgan, 2009), 'borderland institutions' (Ruesga and Knight, 2013), 'impact multipliers' (Rhodes, 2014), and 'anchors' of, and for, community (Perry and Mazany, 2014). Highlighting the diverse roles, hybrid nature, and evolving contexts of community foundations, these images point to the deep embeddedness of these organisations: their need to balance multiple purposes, the requirement to ensure that donors are well-served, that donor interests are aligned

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appropriately with community needs, and the potential of community foundations to act as vehicles of, and for, community cohesion and empowerment. The weight of these expectations, the ability to effectively balance multiple purposes and be adaptable to quite diverse, and often less than hospitable contexts, raises the question of whether the agile may also be fragile.

Our chapter critically reflects on these metaphors. After providing an overview of the emergence and growth of community foundations in the next section, we explore the ideas and implications of these metaphors and how community foundations engage with them. We particularly focus on the dual challenge and potential paradox inherent within the community foundation idea, the need to be philanthropy-led and community-responsive. While to-date scholarship on community foundations has predominantly been US-centric, reflecting their US roots and popularity, we have tried to be as inclusive as possible of the limited research from other countries, particularly in considering recent developments.

## **COMMUNITY FOUNDATIONS' GROWTH: FROM MODEL TO MOVEMENT**

The first community foundation was established in 1914 in Cleveland, Ohio, by Frederick Harris Goff, a lawyer-turned banker. Seeing the potential for greater efficiency in the management of bequests in a manner that could be directed for the betterment of community, part of Goff's vision was to sever 'the dead hand of the past', referring to the various wills and trusts that were frequently left to very specific charitable causes and, thereby, could not be easily redirected when causes became obsolete or when more pressing community priorities emerged (Grabowski, 2002). Consequently, the idea was to pool resources from a

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diversity of donors, not just the wealthy few, into permanent endowments. These would be under the control of citizen boards, focus on community needs as defined by the community, and exercise leadership in identifying new challenges and opportunities (Newman, 1989; Grønbjerg, 2006). The efficiency of this new philanthropic model came through the professionalisation of grantmaking: while financial experts at banks would continue to manage the trust, the appointed citizen committees were to decide on their distribution, thereby moving from a focus on donor control towards one based on public representation (Sacks, 2006; Grønbjerg, 2006).

This model quickly spread across the US; by the end of the 1920s community foundations existed in most major American cities. As the model was transferred, some cities emphasised a community-responsive focus, often commissioning studies to identify the most urgent community needs, while others took a more donor-centric approach, initially concentrating on serving donor interests although many later assumed more reform-oriented agendas (Hammack, 1989; Grønbjerg, 2006). Subsequent expansion in the US was uneven: negligible in the 1930s, rapid growth in the 1950s, a new wave in the 1970s, and essentially flat-lined since 2000 (WINGS, 2012).

From the US, the community foundation idea was quickly exported to Canada. With the central involvement of another banker, who knew of the Cleveland experiment and who made a substantial personal gift, Canada's first community foundation, the Winnipeg Foundation, was established in 1921. Through the next few decades, community foundations followed in major centres. A very active national infrastructure organisation was founded in 1992, followed by 'explosive' growth in smaller centres since 2000 (Feurt and Sacks,

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2000:25), with a current total of about 190 community foundations across the country

(Community Foundations of Canada, 2015).

Outside of North America, community foundations were next to mature in the UK. Although they were not introduced until 1975 and remained poorly understood and under-utilised for some (Leat, 2006), they eventually started 'hitting their stride' during the 1990s (Feurt and Sacks, ND). However, the size and role of community foundations varies greatly across the UK, with only one national community foundation in each of Scotland, Wales and Northern Ireland, and 44 quite different ones across England (Jung et al., 2013; Jung and Harrow, 2014). In England, many of those created after 2000 developed as grantmakers and managers for statutory funds. As such, they are much more reliant on state flow-through funding than the original model of a community foundation envisaged (Daly, 2008); they are not that dissimilar from other publicly funded voluntary organisations which have been seeking a revised resources base (Nevile, 2010). Notwithstanding the 'community' label, most English community foundations are not ground-level upwards organizations: they are better understood as an elite project driven by the global vision and ideas of major private US foundations on the one hand, and UK government actors interested in reducing state spending on the other (Leat, 2006; Vogel, 2006; Baroness Prashar, 2010; Jung and Harrow, 2014).

Since the mid-1990s, community foundations have established themselves worldwide. Their international growth continues unabated, growing by 86 per cent from 2000 to 2010 (WINGS, 2010; Mott, 2012). Within Europe, the last decade has seen a six-fold increase in community foundations with a total of around 650 community foundations as of 2015 (Community Foundation Atlas, 2015). This expansion has been especially marked in Germany. Here, the numbers has risen from 10 community foundations in 2000 to 275 by

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2014 (Hellman, 2010; Initiative Bürgerstiftungen, 2014). In Russia, there are now 43 community foundations (Charles Stewart Mott Foundation, 2012), and the idea is taking hold in Brazil, India, South Africa and China. Due to different philanthropic traditions, the limitations of legal frameworks that define the sector, and the agendas of governments for it, community foundations are, however, still a relative rarity in East Asia (Wang et al., 2011). While numbers for these areas are often uncertain, and expansion is affected by the increasingly blended and boundary-less approach to what constitutes a community foundation in the 'new public philanthropy' thinking, Asia and Africa are widely considered as regions for major future growth of that field.

The global expansion patterns of community foundations testify to the transferability of the idea: the very 'adaptability of the concept makes it possible for communities to mould it to their own circumstances' (Feurt and Sacks, 2000:17). As part of this, however, there seems to have been a shift from conceptualising community foundations as a specific model towards a broader recasting of community foundations as a movement focused on social justice, giving voice and redefining place (e.g. Jung et al., 2103). This is especially prominent in the global 'new generation' of community foundations. Illustrated by Silicon Valley Community Foundation's (2015) mission to 'strengthen the common good locally and throughout the world', these 'glocal' community foundations - combining the global with the local - are representative of, and deeply embedded in, new forms of community philanthropy focusing on empowerment and social change. Many have common characteristics which they share with what might be called 'new public philanthropies', including women's funds, human rights and peace funds, as well as community foundations per se (WINGS, 2012: 23). The characteristics of public philanthropies include: raising money from the public rather than relying on endowments from private wealth accumulation; combining donors and

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beneficiaries in a group; taking an approach that is community-based and bottom-up rather than externally driven and top-down; focusing on correcting injustices in these communities, and; activities being 'generally about more than money', such as community facilitation, technical assistance, advocacy and various degrees of activism (Hodgson and Knight, 2010: 8; WINGS, 2012: 23).

This willingness to be more political is nicely illustrated in Egypt, where it seems that they are 'better positioned than private foundations to support democratic transition and consolidation' (Herrold, 2012: 35). It also highlights that community foundations resist simple classifications alongside organisational types (Hodgson et al., 2012); there is a need to remember that this evolving philanthropic form requires a constant reiteration and reflection on what community foundations are and why they exist. Such redefining, or reminding, may, however, place community foundations in some settings at continuing disadvantage to other, 'easier', forms of philanthropy.

## **THE DRIVERS OF TRANSFER AND THE IMPORTANCE OF INTRA-PHILANTHROPY MENTORING**

While direct emulation and a sense of opportunity (Hodgson and Knight, 2010) partly account for the diffusion of community foundations, critical, if not the critical, factors in this process have been the intra-philanthropic support by national or regional organisations (WINGS, 2010) and the financial support and technical assistance provided globally by leading private foundations. Some community foundations are, therefore, both benefactors – through their grantmaking on others' behalf – and beneficiaries within the wider philanthropic community. In Germany, for example, the founder of the Bertelsmann

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Foundation established the country's first community foundation, the Stadt Stiftung Gütersloh, in 1996 as 'an enthusiastic homage to the American community foundation model' (Spallek, ND). Development in southern Italy was fostered by the *Fondazione per il Sud*, a grantmaking foundation specifically intended to facilitate the creation of viable social infrastructure in the region (Bolognesi, 2012), while in Russia, supporting growth was a leading project for the Charities Aid Foundation (CAF) Russia (ND). In the UK, the Esmée Fairbairn Foundation was central to community foundations' initial growth during the 1970s (Daly, 2008) and it recently supported the 'Philanthropy Fellowships' network. Managed by the UK umbrella body, UK Community Foundations this was aimed at inspiring 'a greater culture of philanthropy in the UK' (Philanthropy Fellowship, 2013). In addition, the US-based Charles Stewart Mott Foundation has played a key role in helping UK community foundations at a critical time during their development in the early 1990s to build their endowments through challenge funding (Leat, 2006: 259). For over three decades, the Charles Stewart Mott Foundation (2012: 6) has also provided a prominent, sustaining, presence for the worldwide development of community foundations, concentrating its major geographic focus on Central/Eastern Europe, Russia, South Africa, and the US.

While endowed foundations might therefore be understood as an essential and key strategic partners for community foundations (Graddy and Morgan, 2006), the transplantation of the community foundation idea, while not lessening the 'movement' claims, might create problematic dependencies; it certainly makes for contradictions. On one hand, community foundations through their focus on locality seek to project an identity of difference from the bulk of organized foundation philanthropy; on the other hand, as beneficiaries, they in some sense become its client, and through efforts at their own endowment-building, become its analogue.



The level of growth of a multi-faceted philanthropic delivery form, at some odds with the overtly private, often single-donor style and substance of private foundations, points to community foundations being regarded collectively as a social movement. This social movement orientation is a strong central theme within the field's practitioner and leadership literature. The 2004 Berlin Symposium on the theme of 'a global movement', for example, emphasized that 'community foundations – and their donors – make a long term commitment to their communities', and while 'many community foundations link their grantmaking to social justice... even where this language is not used, their commitment is to the whole community' (Sacks, 2006: 5). For Canadian community foundations, achieving social justice perspectives on their work was articulated as among 'our toughest challenges', recognizing the importance of 'aiming at solving social problems rather than treating their symptoms over and over again' (Community Foundations of Canada, 2006: 2). Such commentaries accord with scholarship that stresses the significance of transnational social movements during transitional times (e.g. Smith and Wiest, 2012). However, research on community foundations' social movement credentials and characteristics is largely absent. The case that 'foundations can fund movements, not create them' (Masters and Osborn, 2010: 12) adds further complexity: can community foundations *become* a movement? Further research in this area, to accompany practitioner assertion, would be welcome.

Whether regarded as model or movement, with both the terms 'community' and 'foundation' themselves open to contest and debate, the emerging picture is one of an institution necessarily in flux, needing to be dynamic in its multi-purpose actions and increasingly fluid as it develops across time and location.

## **MATCHMAKERS: BEING BOTH DONOR AND COMMUNITY-FACING**

Research and professional practice, particularly in the US, has been dominated by a debate over the extent to which community foundations pursue, or should pursue, an approach that is donor-focused – seeking to raise and manage funds as an expression of individual philanthropy – versus one that is community-oriented – whereby the measure of success is the extent to which community needs are met (Carson, 2003; Guo and Brown, 2006). Although it is increasingly clear that community foundations ‘aren’t just one thing’ (Kasper et al., 2014: 6) and that successful leaders need to attend to both, the pressures of asset building, donor advised funds (DAFs) and public expectations of impact are creating new dynamics in the donor-community nexus.

In a US context Guo and Brown (2006) set out to explore this dilemma for community foundations; they look at variations in the fiscal efficiency and grant-making performance of community foundations and at some of the reasons behind those variations. They found that where there were a larger number of community foundations in a particular state, they were all better at attracting donations. This might be because of greater public awareness, and thereby perceived legitimacy, of the community foundation as a phenomenon. Conversely, in densely populated regions, community foundations appeared to be less efficient at grantmaking. This might be attributable to a ‘crowd mentality’, each assuming that others were meeting community needs (Guo and Brown, 2006: 281-2). Imbalances between raising funds and distributing funds may also occur, with continuing tensions around donor

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expectations as well as those of communities. In some contexts, however, the dominance of, or preference for, donor-facing work is becoming increasingly clear.

Asset building, as an aspect of sustainability and as an expression of a donor serving orientation, remains a central concern of most community foundations. Sustainability is directly related to their ability to acquire and steward their assets and, as Guo and Brown (2006) note, only indirectly related to how well they manage their distribution of funds. A continued emphasis on asset development is also a legacy of a community foundation's history, particularly for those in their 'adolescent' years. In a US study, Millesen and Martin (2014: 841) observe that, in order to grow, many younger community foundations, i.e. those less than ten years old, had spent their start-up years aggressively attracting a variety of different types of funding; when they reached a more mature stage, they continued to do so while 'struggling to define a clear role for themselves in their communities'. In addition, by attracting a broad range of donors and a substantial amount of restricted, donor-advised funding, many found themselves in a position in which they were expected to manage these funds without the administrative capacity to do so (Millesen and Martin, 2014).

Our research in the UK context (Jung et al., 2013) also identifies a marked shift towards emphasis on internal endowment building, whether driven as a functionalist expression of making more certain getting the job done in a sustainable manner during difficult economic times, or as a means to secure and sustain long term community leadership roles. A good illustration of a purposeful reorientation to more donor-facing work are the former Scottish Community Foundation's rebranding in 2012 as 'Foundation Scotland' and the Community Foundation for Greater Manchester's move towards its 'Forever Manchester' brand. As yet, it is difficult to assess whether such recasting – or abandonment – of the 'community

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foundation' title represents a move of building on, or away from, the community foundation as a known, valued institutional form. In effect, where increasing competition for limited resources and falling away of government flow-through funding had occurred, a necessary focus was developing on 'independence through endowment maximization and an emulation of private foundations' funding models' (Jung et al., 2013: 420). From Foundation Scotland's perspective (2015), the benefit has been that, on behalf of its donors, it is able to continue to distribute around £3.5m a year, making it one of the largest funders of the voluntary sector in Scotland.

While asset building has enabled community foundations to make significant contribution to overall philanthropic grantmaking, an endowment emphasis points to a growing institutional paradox: endowment growth draws community foundations increasingly closely towards the private foundation model and to elite donors whereas their creation owed much to a distancing from such an emphatically non-public institutional form. The underpinning of large endowments, however, could to a great extent free community foundations from the pressures of a few donors' control so that "Independence for what" becomes a serious institutional and managerial challenge (Jung and Harrow, 2014).

A major question, however, is the extent to which community foundations have strategic control over their 'assets'. This question is becoming more pertinent with the growth of donor advised funds (DAFs). Pioneered in the 1930s, DAFs are contractual relationships between a donor and a public charity. In essence, the donor's contribution – which has provided a tax benefit where applicable – is held in a separate account. The donor retains the right to advise on when, to whom, and in what amounts distributions are to be made. The legal control over those contributions sits, however, with the charity (Hussey, 2010).

For a high net worth (HNW) donor, DAFs offer a flexible philanthropic means of giving. They combine advice and administration from a trusted institution, knowledgeable about the 'community', without the complexity, costs, or control of setting up an individual foundation. Another factor appealing to donors might be the perpetuity of a DAF, especially in instances where a donor has doubts that his or her 'zeal and vision will be sustained by subsequent generations' (Hoffstein, 2007: 29). To a community foundation, DAFs provide valuable assets that might otherwise have been held with a commercial investment fund. The community foundation can offer advice and matchmaking with suitable projects in line with the donor's interest(s), and the management fees from DAFs can be a significant source of income. The extent to which community foundations actively link their priority projects to donor interests varies considerably. For example, the UK's largest community foundation, the Community Foundation Tyne & Wear and Northumberland (2013, 2014), reports being a very active matchmaker, directing donors to the priorities it has established and in so doing incurring the additional staff resources this entails, while many North American counterparts are more passive holders of DAFs.

The growth of DAFs over the last 10 years has been remarkable. In the US, for instance DAFs have grown more than 10 percent annually, and currently constitute more than 50 percent of contributions and grants from community foundations (CF Insights, 2012: 5). There are widespread aspirations among community foundations to grow DAFs further, to use them to strengthen the local impact and capture 'strategic value' (CF Insights, 2012: 6). Many are actively competing with financial institutions by advertising their advantages for the management and uses of DAFs. The extent to which the importance of DAFs will grow as a both a hallmark of, and lever for, community foundation-led philanthropy beyond North

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America remains to be seen. So, too, is community foundations' capacity to compete with commercial DAF products.

The growing emphasis on DAFs has, however, drawn some sharp criticism. Leat (2006: 267), for example, argues that their disadvantages include 'raising legal issues, being expensive to administer, may lead to the community foundation being seen as little more than a club for the wealthy and most significant, may conflict with the pursuit of community benefit'.

Notwithstanding that a strong emphasis on DAFs and similar instruments may position community foundations as essentially little more than charity banking institutions, the availability of DAFs can also be seen as sound evidence of community foundations' responsiveness to donor needs.

Closely related to this is another challenge levelled at community foundations: that they should move from simply growing DAFs and endowments towards putting them to use for a social, as well as a financial, return through impact investing (Cheney et al., 2013: 45). As community foundations see themselves as stewards of public funds, it is unsurprising that they have been cautious in venturing into program- and mission-related investing. In the US, about a dozen community foundations – mainly those in urban centres that have experience in managing complex assets – were involved in some form of impact investing in 2014, although the portion of assets used in that way is small, averaging 1 to 2 percent (Feuss et al., 2014: 5). Some, however, have set much higher targets. For instance, the Community Foundation of Ottawa (Canada) has an objective, as yet unrealized, of investing 10 percent of its assets in impact investing. The main impediments in meeting such aspirations, once risk averse boards can be convinced, are that the charity markets in which to invest are only

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slowly emerging and still lacking in attractive opportunities. Furthermore, in many jurisdictions the regulatory frameworks are unclear or restrictive.

## **COMMUNITY ANCHORS: EMBEDDEDNESS, REPRESENTATION AND LEADERSHIP**

As institutions of place-based philanthropy, community foundations are necessarily embedded in community. Thus, community foundations present, or seek to adopt, strong local identities, thereby creating an action-orientated lever for philanthropists, capitalizing on existing feelings of belonging to place and wishing to contribute to a place where one feels attached (Maclean et al., 2012). In turn, community foundations as an expression of beneficial localism may be a significant factor in developing successful community engagement and renewal (Easterling, 2008). This may be particularly true in places such as the North East of England, where Maclean and colleagues did their work, and generally in areas where there is a strong sense of regional distinctiveness and social cohesion. Elsewhere the community foundation may play a part in supporting a sense of community pride, contributing to previously lacking community revitalization (Van Slyke and Newman, 2006) and being 'key to the geography of place and thereby "anchor" their communities in real and palpable ways' (Perry and Malzany, 2014: 4). As exemplifier of the philanthropy as well as the geography of place (Glückler and Ries, 2012) community foundations offer an attractive combination, of a recognisable ideological basis, harnessed to a quasi-representative operating structure that is predicated on a collaborative purpose.

A geographic community is not a single economic, social or cultural entity, however. Place is a complex relational endeavour, yet community foundations are equally tasked with both

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reflecting it and exemplifying it as a transformative basis for philanthropy. A fundamental question then is: how well do community foundations understand, respond to and represent in their own governance the diversity of their locales? How well do they function as 'borderland institutions' (Knight and Ruesga, 2013) linking the grassroots, particularly marginalized groups, to the other parts of community, and to what extent are they strategic agents of change for social justice? The record, at least for the well-established community foundations, is mixed. There are, however, recent indications that many are beginning to assume more strategic leadership roles.

In spite of their potential, research suggests that community foundations have tended to be closely aligned to community elites and slow to respond to real problems. In their study of US community foundations Millesen and Martin (2014: 845) find significant homogeneity of board composition and, although board members embraced the value of diversity of representation to reflect the community, they rarely practiced it. This was often justified on the basis that the work was important and required 'hard working people who can get the job done'. It appears that governance practices are changing, though, as many community foundations are experimenting with various mechanisms for engagement of different sets of stakeholders, with youth advisory committees becoming particularly popular.

Beyond mere representation of, and responsiveness to, various communities within place, public expectations and opportunities are driving community foundations to exercise strategic leadership for social change. The traditional means of leadership has been through grantmaking. In the interests of being responsive to an engaging the community at large, though, most community foundations took a 'peanut butter' approach: spreading small grants widely to a broad range of causes and recipients. As has occurred with private foundations,



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there is a growing trend among community foundations to be more strategic in their grantmaking, to identify two or three funding priorities and to direct a substantial portion of their unrestricted funding to these. The primacy of being community-based, however, provides less latitude than their private counterparts to become highly focused.

Grantmaking is not the only vehicle for influencing social change. Community foundations have distinctive opportunities as knowledge producers and brokers, as shapers of community discourses, as direct players in policy processes, and as convenors and facilitators of collaboration among multiple stakeholders to collectively address community problems (Hamilton et al., 2004; Bernholz et al., 2005; Kasper et al., 2014). The exemplar of such a leadership record is the Community Foundation for Northern Ireland: it navigated the sectarian conflicts while remaining respected by all sides, serving as a major force for peacebuilding and improving the situation of the marginalized (Jung et al, 2013). This kind of leadership has been quite rare, however. Indeed, community foundations have come under extensive criticism (Carson, 2003) in that they have not been more active in strategic leadership roles, particularly in taking on a 'social justice' agenda (recognizing the complications and debate over that particular term). Milleson and Martin's (2014: 846) examination of board practices reports, amidst some interesting examples of changemaking, considerable amounts of board behaviour focused towards maintaining 'the status quo', mainly for fear of alienating powerful community members with resource access, along with support for past, 'traditional', practices. Similarly, Wolfe (2006) found that only 2 percent of boards of US community foundations had a social change agenda, with 18 percent 'leaning' to some social change, and 44 percent seeing themselves as 'traditional' community leaders or having no leadership aspirations at all. Leadership practices, too, may be changing and

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various community foundations are taking different paths in ways that are reflective of their communities and that differentiate themselves from other philanthropic institutions.

One approach that has won international acceptance is the annual production of indicators of community well-being. These can be used to advocate for improved services and policy change. Begun by Toronto Community Foundation in 2001, the Vital Signs initiative serves as such an 'annual community check-up' (Patten and Lyons, 2009: 56). It does this by generating user-friendly 'report cards' on a range of nationally agreed upon key indicators of quality of life with the intent of animating conversations with the community and with policy makers. With around 26 annual reports now produced across Canada (Vital Signs, 2015a), this national programme provides far more than a 'strategic perch' (Patten and Lyons, 2009): for community foundations it facilitates both local and national conversations about public policy, without taking a direct advocacy role, a role most community foundations avoid. The Vital Signs approach to 'taking the pulse' of local communities has now spread globally. Examples range from Australia to Bosnia, Brazil, Ireland, New Zealand, the UK, and the US (Vital Signs, 2015b). Yet, this initiative is not without its challenges. In particular, Vital Signs is resource intensive and given that it relies upon on the media to 'carry its message', which may vary depending on the news cycle, its ultimate impact on connecting information to action and the donor responsiveness is not yet fully understood.

Overall, the exercise of leadership aimed at policy and social change by community foundations in developed countries is highly variable. What predicts whether a community foundation is likely to demonstrate such leadership? Life cycle is a partial explanation. Graddy and Morgan (2006) found that, controlling for asset size and community characteristics, community foundations generally follow a predictable pattern as they age.

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They move from an initial, necessary, focus on building donor resources towards a community leadership role. While evolving towards leadership, this was not guaranteed as less than 30 percent eventually assumed a leadership focus. In the UK, Jung and colleagues (2013) report that neither age nor size necessarily recalibrate a community foundation's focus towards leadership as there remains a prominence of endowment building by community foundations linked to the diminishing government flow-through funding. Others (see Sacks 2006) stress the essential ingredient of individual leadership: in Russia, as elsewhere, the success of community foundations is attributed to 'inspired and strong leaders' (Sacks 2006: 17).

Finally, alignment with prevailing governmental agendas will be a factor in keeping community foundations in the public eye, and in prompting them to assume new kinds of leadership roles. With the growing global expectation that private finance will play a central part in solving social problems, some governments, perhaps most actively in the UK, are encouraging an expanded role for community foundations. This is occurring through matching funding as well as through more contested means, such as proposed legislation to direct revenue from state-controlled gambling to community foundations (Sidel, 2010). While a good fit with public policy may benefit community foundations, it may also place very high expectations on them, thereby making them vulnerable to political changes, or implicating them in shifting government responsibilities relative to the nonprofit sector in a manner incompatible with their community-focus (Vargas-Hernández and Noruzi, 2010). Furthermore, the very role of engaging communities in conversations and consultations may make local enemies as well as friends. Wood (2012), for example, cites the US experience of Silicon Valley Community Foundation, encountering fierce opposition from 'Tea Party' members for being too closely aligned to central government (Wood, 2012).

For the 'new generation' of community foundations (Hodgson et al., 2012), the story is quite different. Engagement in leadership in, and for, the community is integral to their work as most are operating in contexts in which relationships between citizens and the state are being re-shaped and most see to enhance the agency of citizens. For example, as Herrold (2012: 37) observes, Egypt's two community foundations, the Community Foundation for South Sinai and the Maadi Community Foundation, in supporting the aims of the revolution led their communities to become more civically and politically engaged. This was despite the risks posed by the legal environment of participating in such activities. Community foundations in developed countries are being urged, by the community foundation 'movement' and by key supporters such as the Mott and the Aga Khan Foundations, to learn from this new wave and to 'reimagine' their own value proposition to their communities as part of innovative approaches to community philanthropy (Bernholtz et al., 2005; Knight, 2012; Kasper et al., 2014: 12).

## **THE AGILE SERVANT: REFLECTIONS ON RESEARCH OF MODEL AND MOVEMENT**

The community foundation model offers a philanthropic archetype, following its North American form as a typical original example, from which others have been copied. In the process of its worldwide spread, the community foundation model has proven to be highly agile, adapting to different contexts, power relationships and aspirations, so that many of its current forms are quite different from the original invention. Increasingly, as community foundations blend into a broader spectrum of community philanthropy, it is difficult to identify a 'simple formula' for what constitutes a community foundation (WINGS, 2012).

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Both the hybridity inherent in the community foundation model and the multiple ways in which it is evolving make research more complex, but more essential than ever.

If the institutionally-based core template is becoming substantially differentiated, it is likely that clusters of community foundation types are forming and are experiencing varying degrees of success. Most of the research, however, has been focused on the US with some international case studies (e.g. Hodgson et al., 2012) and practitioner reflections (e.g. Sacks, 2006), but little comparative analysis. There is a clear need for stronger research that addresses the implications and outcomes of what 'context' means for the shifting nature or retention of a community foundation model and its relationship to, and possible competition with, other forms of community and place-based philanthropy. The latter including established forms, such as United Ways, as well as emerging forms of collective action. Existing research has found community foundations wanting in their leadership roles, and there have been strong admonishments to step up to much greater change roles, but we actually know very little about the processes of, and factors that affect, the exercise of such leadership. Differentiation in interpretations of 'community leadership', with some overtly active, others appearing passive, is an important research topic in its own right; for example, where community foundations have found their leadership spaces through 'niche picking' that differentiates them from other philanthropic institutions (Phillips et al., 2011: 9). This line of research includes the development and effects of philanthropy networks between community foundations and other foundations and trusts, the implications of competitor organisations, including those claiming the position of anchor institutions in communities, and the nature and effects of leadership systems and structures. Importantly, it also needs to address the nature and exercise of community foundations' power. This is a strong theme in literatures critiquing and challenging private foundations, but the examination of power, not

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only in a collaborative sense as 'convening power for' (Ruesga, 2014: 140) but in a more blatant sense of 'power over', is far less emphatic in community foundation studies.

Although the buzz in the literature in recent years has been on the community aspect of the model, we should not lose sight of the foundation aspects. As community foundations continue to build significant endowments, providing capacity that brings them into the operating space of private foundations, it will be important to understand more fully any differences in strategy, and in the ways in which – and whether – they do multiply impact. As DAFs grow, the latitude for unrestricted grantmaking, the outcomes of a quasi-commercial orientation, and outright competition with for-profit financial institutions may have significant effects on the management of community foundations.

Finally, research needs to address the movement as well as the model. Although there is still a reluctance to embrace the idea of being a 'movement', the publication of the first global Community Foundation Atlas, funded by the Charles Stewart Mott Foundation, makes a direct claim for the existence of a movement and the implicit need for its strengthening:

'It is expected that the creation of an easily accessible, comprehensive information resource about the community foundation movement will build a sense of solidarity among members of the field who may not be aware of the existence of many of their counterparts abroad and the similarities of their concerns and the variations in their problem solving' (WINGS, 2013: NP).

This alone creates high expectation levels, and demanding tests for community foundations in their model and movement guises. It also presses home the importance of a strong comparative transnational research and learning agenda, in which typology and theory building form important parts, for this still rather unique philanthropic form.

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