



Time to #ShiftThePower?

Community philanthropy and durable development

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Introduction

How likely is it that a given organization will facilitate sustainable change? Untold millions of dollars are spent, and untold effort expended, in coordinated attempts to make life better for individuals and communities across the world. Iterative processes of review and reform, global initiatives and flavours of the month in philanthropic giving and development aid all testify that few organizations can claim that their efforts have resulted in truly durable development. The Holy Grail is still out there. This paper considers community philanthropy organizations (CPOs): a varied range of civil society organizations whose recognition as a category is embryonic, yet which, I shall argue, are structurally geared to support lasting change in the local communities they serve. I examine why this might be.

In early December 2016 some 400 people from 60 countries around the world descended on Johannesburg. They were participants in the first Global Summit on Community Philanthropy, convened by the Global Fund for Community Foundations. Community philanthropy as a growing and recognized movement (28, 30, 35) has branched out from the rootstock of community foundations (CFs), geographically focussed grantmaking trusts established in early twentieth-century North America. The model as traditionally realized sees CFs act as financial stewards and knowledge brokers for those who wish to invest in the well-being of a given place, usually by making small grants to groups working actively to improve it. The sustainability of older CFs, based on endowments, led from the 1980s onward to a surge of interest in the model outside its original heartlands. The global growth of CFs has been both locally generated and seeded by western donors keen to establish a resource for promoting social development and democratic engagement in post-Communist Europe and the developing world. By 2008 there were CFs on every continent except Antarctica (27, 49), and at the last count there were 1,858 place-based foundations in 71 countries worldwide (37). The strongest growth in CFs – and other types of local giving organizations covered by the community philanthropy umbrella, including women's funds, human rights funds, peace funds, and new generation CFs – has been in the developing world (30).

However, far from being a cosy celebration of philanthropy the Global Summit signalled a definitive cold-shouldering by practitioners from the Global South¹ not only of established western patterns of philanthropy but of development practice more widely. Funders in

¹ I use 'the West', 'western', and 'Global North' interchangeably to denote those developed nations whose values, grounded in Enlightenment rationalism and the economic systems it gave rise to, have shaped the growth to dominance of global capitalism. I use 'the developing world', 'emerging economies' and 'Global South' to denote countries generally at the receiving end of the development enterprise.

the Global North were repeatedly taken to task for addressing complex local problems with one-size-fits-all solutions, short-term timescales, inadequate knowledge of local conditions and lack of regard for local expertise. A majority of participants hailed from countries where CPOs are just emerging as financially small but locally important players in the development arena, sometimes as a 're-branding' of traditional practices reflecting altruism, reciprocity and co-operation (19, 28: 5, 61: x). In session after session, practitioners called for a new development paradigm, challenging traditional CFs along with private philanthropy, international non-governmental organizations (INGOs) and government aid agencies, to #ShiftThePower. This paper seeks to build on the momentum of that event, which – by bringing together practitioners from across the developing world – crystallized a shared dissatisfaction with the status quo and catalyzed a movement for change.

It goes without saying that development – simultaneously theory and practice, both academic discipline and professional endeavour – is a highly-contested concept, with a recognized gulf between research and practice (31, 39). In the already under-theorized field of community philanthropy (33) this ensures that, despite decades of development analysis and the best efforts of research institutes and others, lessons transmitted by academia largely fail to reach those at the coal face. Most delegates in Johannesburg had identified issues experientially as professionals rather than through research as academics. That their demands were in fact supported by a wealth of literature (some of which I touch on below) served only to strengthen them. They explicitly raised the issue that Kothari and Minogue (39: 13) call the 'open secret' of development, unspoken in practice if acknowledged at all, that underpins both community philanthropy and international aid: namely, the operation of power in development settings. Participants from emerging economies overwhelmingly reject development interventions that have left them effectively as subjects, obliged – often by the need for survival – to accept terms dictated by external agencies. Instead, participants urged a new approach: properly informed support by donors for situated responses to local issues, based not on three-year projects with imposed target outputs but on interventions grounded in local expertise, culture, resources and practice.

Such demands are hardly new but are all too rarely acted on. The history of development is littered with poor practice, its literature awash with analyses of its failures (5, 10, 14, 39, 48 – just a handful of examples from an enormous field). The power imbalance between funders and those they fund ensures that most donors have little incentive to adjust their approach (3, 18). But what if evidence of better outcomes provided that incentive? Philanthropists and official aid agencies alike are increasingly focussed on 'Doing Good Better', investing in interventions that can provide hard evidence of impact (16, 42). From the standpoint of Johannesburg this raises the question: should we be shifting power to community philanthropy? Can we show it to be more effective than other types of development at delivering lasting change? Why should CPOs succeed where others struggle?

In this article I consider community philanthropy as a player in civil society; how power shapes the development project, and how this plays out across the community

philanthropy spectrum. I consider how lasting social change is brought about and how different approaches to intervention may hinder or help the achievement of well-being as the object of development. Finally, I explore reasons why CPOs, especially in the developing world, may be structurally geared to deliver durable development in their own cultures and contexts.

1 Civil society, development and power

Community philanthropy in its various guises is generally accepted as part of ‘civil society’². Civil society operates independently in the space between individuals and families, state apparatus and market forces, embracing what Robert Putnam (46: 66) describes as ‘the mechanisms through which civic engagement and social connectedness produce . . . networks of organized reciprocity and civic solidarity’. The widely acknowledged product of these networks is what Putnam calls social capital: ‘social trust that facilitate[s] coordination and cooperation for mutual benefit’.

Civil society is generally held to encompass most non-governmental organizations (NGOs), civil society organizations (CSOs), not-for-profit, voluntary, community or third sector groups. This article focusses on the attributes of small CPOs, predominantly in the Global South³. Hodgson, Knight and Mathie (30: 4) note that: ‘In giving high priority to building trust and social justice in communities . . . [s]uch institutions play important interstitial roles in society, harness the power of small grants, build constituencies among people who are oppressed and marginalized, and negotiate the territory between such marginalized groups and governments’. I ask here what factors might predispose them to promote development more effectively than the more established, better-resourced NGOs that are the usual intermediaries of donor funding, whether from Official Development Assistance (ODA), private philanthropies or big international NGOs (BINGOs).

I focus on CPOs in the Global South with no intention to exclude established CFs in the Global North, many of which have retained features that enable them to work creatively towards innovation and social change (3: 288, 7). However, many established CFs are now themselves at the power-wielding end of the spectrum. With many holding millions, and a few holding billions of endowed dollars (37), many traditional CFs in the Global North follow a predominantly conservative path, supporting social amelioration rather than facilitating root-and-branch change. As I explore below, they may act palliatively – addressing symptoms rather than causes of poverty – to improve people’s lives in the short term whilst avoiding disrupting the social order. Whilst this may be felt appropriate in their local setting, they thus act to uphold the status quo, occupying

2 Amongst practitioners at least, placing philanthropic activity functionally within civil society – ie between individual, state and market – has proved more attractive than alternative academic arguments (eg 39: 12ff).

3 For the purposes of this article I follow Hulme and Edwards (31: 288) in positioning NGOs as transactional and CSOs as closer to a transformative ideal. Inconveniently, since both ‘do’ community philanthropy, I distinguish community foundations (CFs) as established Northern bodies from CPOs as less formal, Southern organizations of different types – even when (like the one I chair) the latter are called community foundations.

a position described by Susan Kenny (34) as ‘settled’, i.e. conservative, rather than socially ‘unsettling’, i.e. geared to producing change (25). Ironically, their financial stability and independence should enable established CFs to take risks in grantmaking, funding left-field causes unpopular with other donors (24, 56). However, many fall back on unchallenging donor-advised prescriptions – funding the city ballet, or – the joke stereotype of such grants – feeding the squirrels in the park. They may be more inclined to consolidate power than to shift it⁴.

I do not contend that community foundations occupy a unique niche of effectiveness: indeed, Anheier and Leat (3: 273) caution against an apparent assumption by some CFs that they can ‘do it all’ – a claim that overreaches their resources and capacity. Nor am I claiming that small CPOs in the Global South are universal catalysts of social transformation. There is still no magic bullet. However, as I will show, it is becoming apparent that small CPOs combine a set of properties which, in the right circumstances, enable them to punch well above their weight – sometimes producing results that heavier-handed, top-down development can only dream of⁵. At a time increasingly dominated by evidence-based philanthropy and impact evaluation, one might expect them to be the flavour of the month. Yet – as participants at the Global Summit made clear – this is far from being the case. This paper is an attempt to explain how and why CPOs are structurally geared to be effective change agents in their own settings. I begin by considering the niche occupied by CFs and CPOs in civil society, and at the way power operates in the context of development.

Community philanthropy as civil society

Younis (63: 6) comments: ‘There is no blueprint for community philanthropy’. However, diverse as they are in practice, CFs and CPOs do share a set of defining characteristics. They are organized, self-directed, have ‘open architecture’ (i.e. structures amenable to local change), belong to civil society, are committed to building an inclusive and equitable society, and utilize their own money and assets – both for redistribution and to leverage additional resources (30). As Kilmurray (35: 3) points out: ‘the first four items on this list could apply equally well to any non-governmental organization. It was the addition of the fifth item that was essential to the categorization of community philanthropy’.

Michael Edwards (12:9) typologizes civil society in three broad categories:

- i Associational, that is, formed by self-governing organizations to promote welfare and constructive social norms, and as a defence against intrusions by the state on individual rights and freedoms;

4 The recent turmoil in the Silicon Valley Community Foundation provides an extreme and tragically ironic example of this strategy: <https://www.philanthropy.com/article/Opinion-Growth-or-Mission-/243383>.

5 For some pertinent examples see, inter alia, Gilbert & al Jebraali (23), and a wealth of examples on the Global Fund for Community Foundations website: <http://www.globalfundcommunityfoundations.org>.

- ii As a means of producing a 'good society', combatting the alienation from community and environment resulting from modern life and reconstituting those relationships on the basis of inclusive values; and
- iii As a site of progressive politics, the 'social basis of a democratic public sphere through which a culture of inequality can be dismantled'.

CPOs are a small but increasingly important part of this upswelling of civic engagement (37). Edwards comments (12: 1) that: 'Collective action in search of the good society is a universal part of human experience'. To whatever extent this may have been true historically de Tocqueville (54) noted that voluntary associations were flourishing in North America, where CFs started, as early as 1839, it is undeniably the case now. Since the last quarter of the twentieth century there has been a major upsurge in NGOs on every continent: what Salamon (50: 1) calls a 'global associational revolution'. Unless suppressed by authoritarian regimes with no interest in promoting active citizenship, NGOs have proliferated, especially in the developing world and countries emerging from authoritarian rule (1, 31). Encapsulating norms of tolerance, trust and cooperation, they have been seen as standard bearers of what Edwards (12: 44) articulates as 'the social order to which all modern democracies are gradually working'.

As well as arising spontaneously in many societies the growth of CPOs has been encouraged by western funders in post-authoritarian environments where social capital and trust have been eroded, as a means of encouraging active citizenship in pursuit of democratic engagement. Kenny (34: 4–5) typologizes four kinds of active citizenship within her comparative analysis of NGO attitudes in the Global North and South, ranging from ameliorative actions based on maintaining relations within an existing social order, to what she categorizes as 'visionary citizenship', challenging existing structures, values and power relations.

In Kenny's first category, as in Edwards' associational type, the active citizens tend to be socially conservative. Edwards (12: 14) comments:

'... conservatives tend to look back in time to re-create what they consider to be the best of times, defined according to a particular set of moral standards. Liberals and social democrats, on the other hand, tend to look forward to better times to come, so they pay more attention to civil society as a vehicle for creating new solutions'.

This neatly binary description, whilst arguably reductionist, nonetheless highlights a salient feature of actors in the community philanthropy arena. CFs (and formally constituted CPOs) have inclusive boards which reflect what is seen as both the supply and demand sides of their communities, often with very different political complexions. The upside of this inclusivity is genuine engagement of all sections of the community, and a reasonable claim to be informed brokers of community knowledge and trust. However, most CFs suffer what Kilmurray (35: 6) calls a 'crisis of identity': the two constituencies they straddle often have contradictory agendas, needs and philosophies, embracing both inherently conservative donors and grassroots beneficiaries invested in social change

(3, 31, 34). How they negotiate this often uncomfortable position depends where they sit on a spectrum of development practice defined by Kenny (34: 1) as running from 'settled' (conservative) to 'unsettling' (more radical or visionary). Carson (7: 68–69) castigates CFs who, by strategically claiming neutrality, avoid asking donors to challenge the fairness of the socioeconomic system to which they owe their success. He views their position as an abdication of a responsibility to use their power in pursuit of social justice. Whilst some large Northern CFs have successfully championed social justice issues (3, 27), many CFs in the Global North are apt to confine themselves to affirming an associational approach to supporting networks of common interest (34: 7), or to activating giving and generating community dialogue (25: 16). They see their main contribution, according to Knight (37) as 'building the architecture for solving social problems rather than solving problems directly'⁶. These CFs have become part of what Gibson et al (18) refer to as the 'dispositif' – the network of organizations and institutions that constitute the Establishment. They can rarely afford to do otherwise, when the real power within the organization inevitably lies with those who provide and control the resources: i.e. those who err towards conserving, not challenging the politico-economic status quo. Using Kenny's typology, Harrow and Jung (25) identify CFs as 'settled', producers of ameliorative rather than transformational change.

This systemic brake on CFs' ability to pursue social justice goals, acute in CFs in the Global North but applicable also to other NGOs, has led Kenny (34: 10–12) to question whether NGOs in the developed world are organizationally suitable for their accepted role as sites of community development. However, her findings were very different in the Global South. There, NGOs surveyed showed a 'strong commitment to oppositional action and visionary attitudes and ideas'⁷. Participants – as at the Johannesburg Global Summit – were 'keen to articulate and act on ideas for a pluralist and tolerant [society]'. As Civicus' Sriskandarajah has noted: 'A new generation of citizen action [is] manifesting itself in creative, disruptive ways' (11), both seeking to change the system and providing what Gibson et al (18: 5) call 'dissensus' – stepping outside the system altogether rather than changing it from within. Yet the relationship of CPOs with their external donors may mirror the internal difficulties of established CFs, and with effects that equally hamper effective development efforts. CPOs in the Global South – often dependent in their early stages on donor funding for core support – may aim to change society but are often hostage to 'he who pays the piper' thinking: the view that donors alone have the right to lay down terms and conditions of grant support. I look now at how, in the Global South, power relations are not cloaked by Carson's 'myth of neutrality' but operate openly, much as they have done since development became a discipline.

6 I was present at a 2002 convening of the Transatlantic Community Foundation Network when Emmett Carson, then CEO of the Minneapolis Foundation and a champion of social justice philanthropy, taxed a Canadian colleague with failing to change society. 'Change society?' replied the colleague. 'I'm too busy making grants to change society!'

7 It is important to read these comments as descriptive results of specific research questions rather than value judgments: there are of course many places, especially in the Global South, where challenging the politico-economic status quo may be both inappropriate and unsafe, and many others where a strategy of working within the system by no means implies a lack of ambition to improve it.

Aid, development and 'underdevelopment'

Enormous expectations and colossal resources ride on the international development project of which CPOs are part. Development funding has never flowed with such liberality. US Net Official Development Assistance (ODA) stood at almost U.S. \$340 billion in 2016, while the OECD's 23 Development Assistance Committee (DAC) countries collectively contributed over U.S. \$145 billion. Moreover, while international ODA rose by 6% per annum between 2005 and 2012, according to Henon (26) private giving over the same period grew by an astonishing 68%. The Giving Pledge⁸, started in 2010 by Warren Buffett and Bill Gates, encourages fellow billionaires to give more than half their wealth away. By March 2016, this single initiative had persuaded the 139 individuals signed up worldwide to pledge \$365 billion, exceeding the entire annual ODA contribution of the United States.

Much of this official and private aid will find its way to the Global South – not least since almost the entire world is signed up to abolishing poverty and achieving seventeen Sustainable Development Goals (SDGs) by 2030 (55). In the prevailing neoliberal climate a high proportion of responsibility for delivering development has been outsourced under contract to NGOs, making equitable access and appropriate implementation central to achieving change in global communities. Fearing repetition of lessons not learned, delegates in Johannesburg from the Global South chose to articulate concern.

They did so by challenging the 'open secret' and invoking the notion of power. Indissolubly linked with the practice of politics, for most NGOs all mention of power is politely side-lined from the conversation – whether, as noted above, in deference to donor sensibilities, or because active involvement in politics is proscribed for most. Yet this was the discourse with which donors were challenged in Johannesburg. Rooted in left wing thinking, as Kenny (34: 2) points out, it uses the politicized language of liberation struggle rather than the more neutral language of Third Sector analysis. Now sounding quaintly old-fashioned in the post-Communist Global North, it reflects abiding realities in the Global South. The neoliberal approach that now shapes development practice may overlay this discourse but has not replaced it.

The international development project grew out of a post-1945 agreement in the developed west to transform the 'undeveloped' world in pursuit of prosperity and progress. Rooted in the assumption that western standards were the benchmark against which to measure an underdeveloped 'Third World', the project operated at many levels along similar lines to the colonialism it came to replace. Interventions were justified by a representation of large parts of the world as lacking when judged by western norms. This orientalist construction of the 'Third World' as inferior and requiring continued intervention by superior powers entrenched existing power relations and undermined efforts in newly-emerging post-colonial countries to construct their own societies, norms and cultural models (14, 45). The fact that today 99% of official aid is channelled through western intermediaries, with a mere 1% given directly to organizations in the

⁸ givingpledge.org

Global South (29) is evidence enough of the enduring power of this discourse. As Escobar (14: 13) puts it:

'Development has relied exclusively on one knowledge system, namely, the modern western one. The dominance of this system has dictated the marginalization and disqualification of non-western knowledge systems. In these latter knowledge systems . . . might [be found] alternative rationalities to guide social action away from economistic and reductionist ways of thinking'.

To many commentators the aid sector – whether bi- or multilateral agencies or private sector actors – is locked into approaches that resist evolution. Today's World Bank, UNDP, USAID, DfID et al, and their private philanthropic counterparts, are inheritors of a drive to restructure the world in a western image: what Murray Li (2007) dubs 'the will to improve'. It is a world in which 'city-based trustees distinguished by their education and technical know-how join[ed] with the transnational development apparatus to expound on how deficient, tradition-bound villagers should live' (40: 15).

Whether implemented by major bilaterals or grantee-partners of private philanthropies, this approach tends to take the same course: first, define a problem in terms amenable to the sort of solutions aid agencies can provide; then frame technical solutions to solve it. To do this requires 'othering' local people, highlighting community deficiencies rather than assets and skills, and constructing local people as responsible for problems requiring technical intervention by 'expert' outsiders. Such approaches 'depoliticize' problems, taking them out of the arena of politics – as for example in the many projects intended to tackle environmental damage attributed to overgrazing by pastoralists, where poverty in a given region is constructed as a problem of poor livestock management by local people (a 'fixable' problem), rather than one of systemic inequality caused by political relations (too hot to handle). Avoidance of political involvement, however, means development interventions may appear to tackle social issues while leaving the root source of the problem untouched or made worse (see e.g., 15, 21, 40, 44). The consistency with which this approach has been applied worldwide prompts speculation as to whether, unrecognized by its practitioners, the goal of much development aid is actually the internalization by its recipients of conservative western norms so as to produce Foucauldian 'docile subjects' on a global scale.

The workings of power in development discourse are seen also in knowledge production, where the prevailing version of reality defines what is measured and how success is described. Chambers (8: 1746) notes how the language and concepts of development both express and form the mind-sets and values of dominant linguistic groups, disciplines, professionals and organizations:

'Among professionals, words and concepts of engineering preoccupied with things, and applied economics preoccupied with quantification, still set the agenda and vocabulary of much development discourse . . . [However,] the realities of poor people and professionals are notoriously disparate. Again

and again, the realities of those who are poor and marginalized are ignored and misread’.

Logical frameworks and cost-benefit analyses leave little room for local people’s own responses and narrative structures, paradoxically defeating a common objective of development, namely to empower local people by giving them ‘voice’ (38).

A frequent effect of this use of western norms to assess societies in the Global South is the production of a sense of comparative poverty in their communities, leading people to see themselves as ‘underdeveloped’. Prior to the imposition of what Sachs (48: 4) calls ‘the spreading monoculture of economized notions of development’, people used their own yardsticks for judging prosperity⁹. In the Bedouin communities with whom I work, wealth has traditionally been expressed through generosity rather than material display (22: 49). Lummis (41: 49) comments that the idea of the common good, or ‘common wealth’, often goes hand in hand with co-operative use of resources and modest personal consumption. However, approaches to life that resist quantification and promote social or environmental values over wealth generation are discounted by funders as contributing to ‘underdevelopment’. The global reach of development thinking, Lummis (41: 48) comments, ‘dispossesses the world’s peoples of their own indigenous notions of prosperity’, leaving them newly dissatisfied with their lives. ‘This is not our life’, a Bedouin woman once commented to me, surveying newly-built apartment blocks at the edge of her desert village. ‘It’s just a copy of other people’s’ (20: 27).

In problematizing local issues using western judgments, then, donor bodies may override locally-developed responses to a society’s own challenges and discount its non-economic assets. In the process, local approaches – Escobar’s (14: 13) ‘alternative rationalities’ – may be entirely lost. The reassertion of the value and validity of indigenous systems and local approaches to community support lay behind the call to #ShiftThePower.

Virtually all major aid donors aim to reduce poverty and improve quality of life for all (43: 181). However, many donor bodies are blindsided by a working paradigm that discounts local context, assets and experience, resulting in misapprehension of how local change can best be catalyzed. Assessing the strengths of CPOs in the light of this challenge gives greater weight to their nuanced local understandings – however small, in practice, some CPOs may be. Chambers (8: 1746) calls for a new development ‘ecology’, incorporating understandings of ‘local heterogeneity, networks, dynamism, sequences, transitions and synergies . . . based on interdependence, recycling, partnership, flexibility, diversity, and as a consequence of all those, sustainability’. To locate community philanthropy as central to this new ecology I turn now to well-being as the object of development, and how durable change is achieved.

⁹ Reporting on a recent consultation which included indigenous peoples, Synergos (53: 5) noted that: ‘Poverty [is] a foreign concept for peoples who see the Earth as a sacred provider of all the things we need to survive on this planet’.

2 Well-being as the object of development

Development seeks to bring about well-being; and in order to increase well-being in an imperfect world, something has to change. Power has to shift. In White's words (57: 4–5), the search for well-being 'gives voice to desires for an alternative, a new moral economy in an emerging world failed by traditional political dispensations'. As such it provides a suitably focussed lens through which to view CPOs' diverse, responsive and situated activities.

The original objective of development activity, as noted above, was the improvement of the developing world in line with western norms of economic progress. However, it has long been recognized that economic growth alone is insufficient as the object of development. Sen – the economist architect of the Millennium Development Goals – describes development not in terms of economic growth but as an integrated process of expansion of interconnected freedoms: political, economic and social (51). Sen articulates human development as the capacity of individuals to make free choices to improve their lives according to their own norms and values. Quality of life can be improved by fostering what Sen (51: 75) calls 'valued functionings': the various things a person may value doing or being. These may vary from being properly fed and free from preventable disease to being able to participate in community life and having a sense of identity or self-respect. I explore below how, whilst CPOs may not normally be empowered to address structural causes of poverty (and in some polities are increasingly prevented from doing so¹⁰), they may provide communities not only with the capacity to achieve concrete improvements judged by their own values, but also the 'capacity to aspire' (4). Sen (51: 74) refers to this capability and its results as 'well-being' – a broad human value that is empirically defined, open to local definitions, and the ultimate end of development (8, 57).

Detailed contextual awareness of local ideas of well-being are central to its realization, worlds away from externally imposed, one-size-fits-all notions of what a given community may need, and playing directly to the strengths of CPOs discussed above. Some elements of well-being may be assessed traditionally using objective, externally verifiable criteria (e.g. level of income, education or housing provision), but others are subjective, depending on the personal response of individuals to their circumstances and societies. White (57: 6ff) identifies four approaches to well-being that can be exercised in public policy:

- i A macro approach, encouraging governments to look beyond economic growth as the marker of progress;
- ii A personal approach, encouraging individuals to take action to improve their own well-being;
- iii A utilitarian approach, assessing policy or programme effectiveness in maximizing public benefit; and
- iv A political approach, interrogating current political, economic and social provisions.

¹⁰ See for example: 1, 17, 63).

These different aspects converge to produce a portmanteau concept of ‘comprehensive well-being’ which requires a broad range of indicators over and above economic growth to measure social progress, measures things that matter to people rather than statisticians and donors, and includes subjective indicators – providing an answer to Chambers’ (8: 1747) question: ‘Whose Reality Counts?’

The use of subjective indicators is not without its problems: White notes (57: 18): ‘High satisfaction may signify the low aspiration of internalized oppression’, and points out, with Sen and others, that ‘people may state they are happy in very grim circumstances’. She cites Jackson’s (32: 61–62) comments on the Kuranko of Sierra Leone: ‘. . . it is how one bears the burden of life that matters. Well-being is . . . less a reflection on whether or not one has realized one’s hopes than a matter of learning how to live within limits’. However, Jackson (32: 59) notes: ‘Because human existence is nothing if not social and ethical, fulfilment does not lie solely in our freedom to lead the kind of life we [might] value; it consists in our capacity to realize ourselves in relation to others’.

This adds a further aspect to the concept of well-being. Relational well-being, White explains (57: 29), is newly emerging from challenges to other approaches, and positions well-being as ‘a political alternative to development’. It melds sociological, anthropological and geographical approaches in pursuit of the Latin-American concept of *buen vivir*, or ‘living well together’, and is theoretically rooted in a postmodern conception of well-being as socially and culturally constructed. Relational well-being is also promoted by cultural patterns, common (as noted above) in the developing world that valorize reciprocal relationships over individual status¹¹. Emphasizing the process-led nature of relational well-being, its analysts present it as a mutually reinforcing series of component elements including the material, subjective and relational, all of which are profoundly grounded in place, and in ‘substantive understanding of the lives of the target population’ (White 57: 32).

Illustrating the relational nature of well-being, and illuminating mechanisms through which I will argue CPOs might claim to advance it, the Psychosocial Assessment of Development and Humanitarian Interventions (PADHI) programme was established in 2006, at the University of Colombo, to assess the impacts of post-tsunami interventions on a Sri Lankan population already traumatized by decades of civil war (2: 37ff). The programme led to the creation of a framework which conceptualized well-being, grounded in the principle of social justice, as comprising five constitutive interconnected domains within a mediating dimension of power, identity and influence, and an enabling environment created (or disabled) by systems and institutions. The five domains – expressed using active verbs to emphasize the centrality of agency in achieving well-being – are articulated as follows:

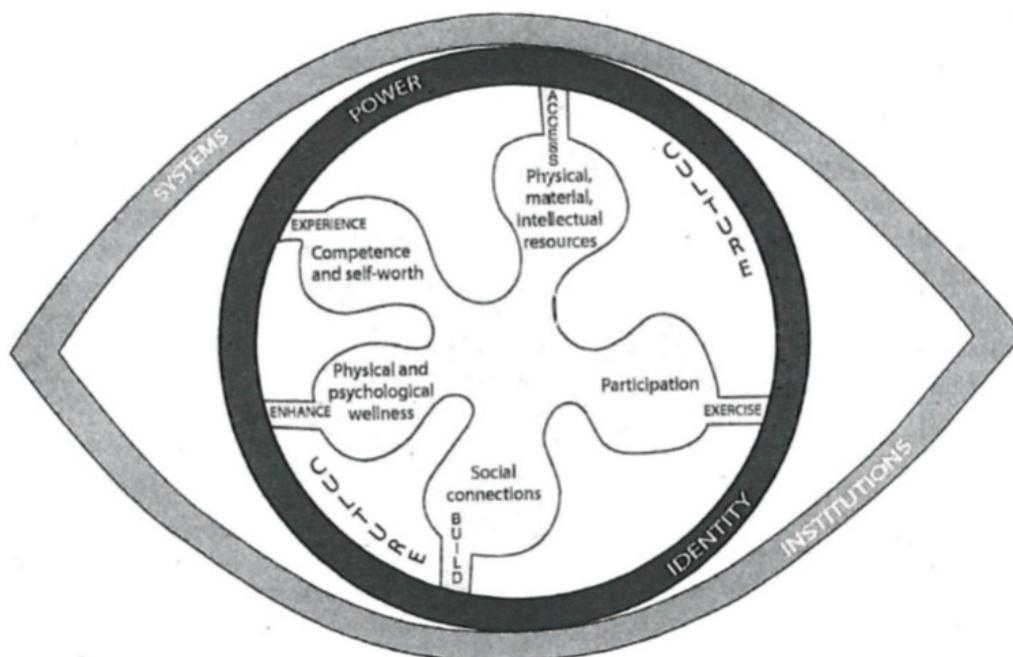
- **Access** – physical, material and intellectual resources
- **Experience** – competence and self-worth

¹¹ Quoting Howard Thurman, Ambassador James Joseph alluded to this idea in an address to the Johannesburg Global Summit: ‘I want to be me without making it difficult for you to be you’.

- **Exercise** – the ability to participate
- **Build** – social connections
- **Enhance** – physical and psychological wellness

Fig 1: PADHI psychosocial well-being framework

Five interconnected inner domains identify key elements contributing to individual or community well-being; aspects shown in the central ring – power, influence and identity – mediate the experience of well-being; and the outer, enabling environment of systems and institutions contribute to or undermine achievement of well-being (58: 41).



Abeyasekera (2) stresses that the achievement of well-being through these domains depends on everyone having the ability, opportunity and freedom to engage in them actively. This necessitates, within a social justice approach, a focus not only on economic rights but also an attention to power relations (both within and between social groups), and finding ways to channel unheard voices as well as stronger ones. A strongly transformative intention is at its heart, to which the key is agency. Both Chambers (8) and Edwards and Sen (13) stress the role of individual behaviour in accomplishing social change through what Chambers calls 'responsible well-being', while Kothari and Minogue (39: 13) emphasize the role of institutions in creating the conditions in which change can take place. As Sen (51: 11) puts it: 'With adequate social opportunities, individuals can effectively shape their own destiny and help each other. They need not be seen primarily as passive recipients . . . of development programs'.

I have looked so far at why many traditional funders – even CFs – appear to resist change, and at how existing power structures continue to marginalize change agents in the Global South. I have explored well-being – relational, situated, oriented towards social justice and effected by agency – as the object or alternative means of development.

Development, however, is rarely billed unqualified as the goal of philanthropy and other aid. The Holy Grail is *sustainable* development: improvements in well-being that outlast a three-year project brief. I look next at how social change happens, what makes it durable, and what might characterize organizations most likely to advance it.

3 Change and how it works

In Section 1 I outlined how poor development outcomes are often the product of externally-defined, donor-driven interventions grounded in western rationalism: they assume neat, linear chains of cause and effect – ‘If we take x action, then y change will result’ (62: 16). Danny Burns and Stuart Worsley (6: 5) explain the dangers of assuming that complex social and environmental systems are predictable, static and amenable to planned interventions that can be replicated in any number of contexts. Although the resulting sense of certainty is attractive to donors and international organizations because it offers a sense of control and accountability, they argue, ‘control . . . has *de facto* become a higher order value than the achievement of sustainable change’. Reported successes are often self-referential, relating to indicators defined by project technicians themselves rather than to real improvements on the ground. As the Stiglitz Report (52: 3) points out: ‘What we measure affects what we do, and if our measurements are flawed, decisions may be distorted’. Donor-defined indicators, then, do not always reflect locally desired outcomes. Western interventions in developing countries are apt to ignore the fact that, as Burns and Worsley (6: 10) put it: ‘local power dynamics are underpinned by deep-seated system patterns which are highly resistant to external change’.

These principles hold good right across the development scale, from governmental interactions to local community projects. Top-down solutions devised by outsiders, however well-intentioned, will not solve local problems – nor, as discussed above, promote well-being – unless they take account of complexity and context. The people who know best what will work in a given place are those embedded in its culture. Even at the micro scale of local projects, development practice routinely ignores the experience and expertise of local populations, tells people what is good for them, and measures progress only in its own terms. Small wonder that many development efforts spend so much money but achieve so little lasting change.

How change works

In a cogent analysis, Burns and Worsley (6) describe the mechanics of change in development contexts and signpost the characteristics of organizations likely to deliver it. They emphasize the need for development actors – donors and practitioners – to recognize the unpredictability of outcomes produced by the continual interaction of complex variables: ‘where small changes create domino effects which result in big changes; where many small changes create system-level patterns’ (6: 25). Key elements of change are identified as *emergence* – that is, an unplanned outcome of an intervention, or

one that is more than the sum of the actions that produced it; and *attractors*, or powerfully consistent patterns of thought or behaviour in a society, which change initiatives need either to harness or overcome if they are to be sustainable. A *latent attractor* is a position which people are starting to adopt, but which has not yet reached critical mass to ensure its survival as a new norm: for example, attitudes towards women might gradually be changing in a given region, but this is not yet manifest in its social norms and institutions. At a certain point when there is a critical mass of changed attitudes, material change becomes possible. It becomes visible when it reaches a tipping point, where 'all the pressure is building, and suddenly change happens'. The job of effective development – defined as seeding and nurturing, not controlling – is to identify and work with tipping points, both where they are happening and where they might become possible. Change, Burns and Worsley comment (6: 30) is highly context-specific and often emanates from tiny local interactions that can have a big impact over time because cumulatively they shift the dynamics of the wider system (which, as noted earlier, may be highly resistant to externally imposed change). Effective change agents therefore need to operate at the most local level of interactions, and to investigate, acknowledge and support the local-level diversity that produces small-scale change. Meanwhile, Vogel (62: 16) asserts that complexity can be factored into development programmes through good context analysis and critical challenge to planning assumptions – in other words, not through the pre-set logframes of major NGOs and institutions, but through thorough understanding of local environments. Backed by the focus on deep contextual knowledge demanded by well-being analysts, these insights further highlight the importance of locality to effective development and durable change.

To paraphrase Schumacher, 'Local (and probably small) is beautiful' would seem to be the desirable direction of travel. However, many major donors select projects to fund not only for their intrinsic value but for their potential to be replicated elsewhere and scaled up. This emphasis on 'scaleability' provides at least one answer to the question why budgets remain in the hands of BINGOs rather than smaller, local organizations closer to the ground. However, as Clark et al (9: 4572) point out, the conditions that produce change 'often reflect the intersection of multiple higher-order conditions in a particular place', with the result that 'the socio-economic system dynamics that shape the future will . . . seldom be the same ones that have shaped the past'. Like other aspects of development intervention, replication or 'roll-out' is fraught with risk without the attention to context that local organizations can provide. However, it is legitimate to ask how likely it is that small-scale organizations can effect improvements in many people's lives, let alone transformative system change.

How change spreads

Again, Burns and Worsley's analysis of the process (6: 43 ff) is revealing. They identify three key elements which must be present if systemic change is not only to be sparked but also sustained, and which they call the *critical process triangle*. They are:

- **Participation** in deliberation, decision-making processes and in action;

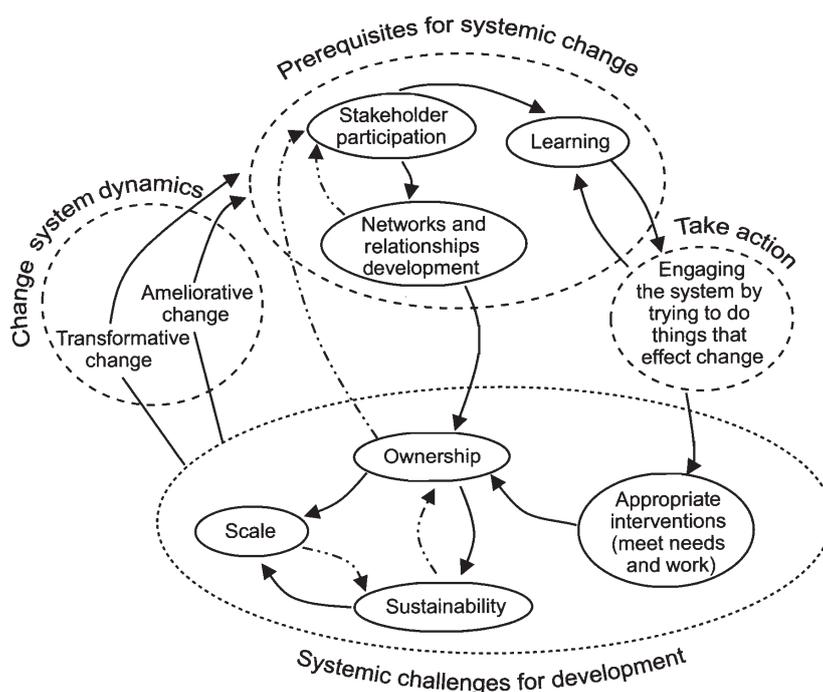
- **Learning** to identify what change is needed and what change might be possible; and
- **Relationship and network building** to spread ideas and learning and to inspire new action.

Where these factors are in play they generate:

- **Appropriate interventions** that meet needs and that work; which in turn lead to
- **Ownership** by stakeholders. These lead on to
- **Sustainability** of outcomes; and potentially
- **Scaleability** of outcomes.

These four elements – ownership, appropriateness, sustainability and scale – are identified by Burns and Worsley as the key challenges of development. All four are required in order to effect meaningful change, whether palliative or systemic (transforming system dynamics and power relations in the long term). These interdependent elements form a complex, non-linear network of feedback loops. Only when there is appropriate action is there ownership. Ownership feeds back into higher levels of participation, which in turn supports a learning process which ensures actions remain appropriate. Energy and enthusiasm resulting from appropriate action reinforce ownership, which ensures sustainability. Ideas and innovations, Burns and Worsley point out (6: 44), take off only when there is a high level of ownership, transmitted through social networks like a virus. Enthusiasm, built on a belief that an action will make a difference, is channelled through relationships.

Fig 2: Framework for understanding how to achieve sustainable change at scale (6: 44)



Who is the best judge of whether a local intervention will make a positive difference? Usually, people with experience of local system dynamics and environments. But their expertise can be harnessed only if they are heard and engaged – whether by a formal process such as participatory research, or by the encouragement of immanent development – that is, initiatives that well up from within a community. Initiatives that speak to local people will act as *attractors*, encouraging further participation, shifting behaviour and system patterns, and permitting continuous learning. Relationships and network building are crucial factors both in transmitting that learning, and in building social capital and trust. In many cases they have researched, Burns and Worsley point out (6: 48–9), the relationships resulting from interventions are as important as the activities themselves. This reinforces findings from Sri Lanka’s PADHI programme, cited above; namely, that the principles and values underlying programmes, and the way in which they were implemented, were better predictors of effectiveness than the interventions themselves (58: 39). According to Ramalingam (47): ‘The network is the development’. The implications for organizations working locally, within local norms and building on existing relationships of trust, are very clear.

Burns and Worsley’s analysis of how change happens, and what factors are needed to support it, enables us to start answering the question posed earlier: how likely is it that a given organization will be able to support sustainable change? From it, we can build a picture of an organization rooted in its place; with deep, first-hand knowledge of the systems, issues and conditions that affect its residents, and an ability to act in response to them; one that supports appropriate local development initiatives, enabling them to be owned, repeated and spread; one that has the trust of local people, and networks of relationships and resources that span the whole community. I return, then, to a class of organization described in Section 1 as ‘giving high priority to building trust and social justice in communities . . . [able to] play important interstitial roles in society, harness the power of small grants, build constituencies among people who are oppressed and marginalized, and negotiate the territory between such marginalized groups and governments’ (30: 4). They occupy territory identified by Anheier and Leat (3: 283) as a prime location of innovation: ‘. . . at cultural, political and social crossroads . . . in situations that bring different and frequently contradictory elements together’; and develop what Edwards and Sen (13:607) call ‘self-reinforcing cycles of cooperation, sharing and stewardship’. Enter community philanthropy.

4 Community philanthropy and the rise of the horizontal

As noted in Section 1, recent years have seen a rapid increase in CPOs – both ‘new generation’ CFs, local CPOs and other types of organizations harnessing local giving in the service of development and social justice. Knight (36) attributes to these CPOs five characteristics that distinguish them from traditional philanthropy:

- i To fund their activities, they raise money from the public rather than relying on an endowment resulting from the accumulation of private wealth;
- ii People from the communities that benefit from the philanthropy are part of the group of people who are donors;
- iii The activities undertaken are shaped by the communities they are working with rather than being developed from outside of those communities;
- iv The activities commonly stem from some form of injustice in those communities that results in some groups in the population being disadvantaged or discriminated against; and
- v Their activities are generally about more than money, including technical assistance, convening, and advocacy, and therefore involve a degree of activism by standing alongside the communities they are working with (30: 12).

These characteristics illustrate elements highlighted in both previous sections, in which deep understanding of, and engagement with, local context was presented as the basis for successful pursuit of well-being through social change. I have noted above that such engagement is by no means the exclusive preserve of CPOs. However, it is instructive here to refer to Hulme and Edwards’ (31: 288–9) typology of NGOs vs civil society organizations – by which they understand ‘authentic citizen action . . . activat[ing] a much broader base of civic energy for change [than NGOs]’, and for which one might substitute ‘CPOs’ as I have defined them in this article.

Fig 3: Idealized characteristics and attributes of civil society organizations and NGOs (31: 288)

	Civil society organizations	NGOs
Relationship with the state	Oppositional	Accommodating
Constituents	Members	Staff
Accountable to	Members	Donors
Programme design	Demand-side approach	Supply-side approach
Community participation	Political	Non-political
Strategy	Development as leverage	Development as service delivery
Development ideology	Development as social, political and economic change	Project-based and target-oriented ‘development’
Tackling/addressing	Root causes of poverty	‘Symptoms’ of poverty

The active espousing of a socially reformative change agenda is of course not exclusive to community philanthropy. However, CPOs do have one key differentiating feature: Knight's first point (above): publicly-raised funds. As opposed to NGOs dependent on external donors for project funding, CPOs – as Wilkinson-Maposa (60: 52) puts it – must secure a licence to operate by being responsive to community needs. Those engaged in CPOs have *by definition* committed themselves materially to their activities, whether financially, or in time, skills or goods contributed. While other civil society organizations may, of course, receive concrete support from their members, CPOs are by definition reliant on local contributions. As a result, they have guaranteed community legitimacy, because without local support they would simply cease to exist. Furthermore – and perhaps more importantly – CPOs are structurally bound to focus on the assets and capabilities in their communities: they encourage people, in White's words (57: 5) to 'express their aspirations rather than rehearse their deprivations'. Many organizations including CPOs will necessarily blend local and donor-led priorities (60: 52). However, *structural* local buy-in, harnessed in the service of local well-being, gives CPOs a serious claim to fall within Burns and Worsley's 'critical process triangle' that leads to sustainability.

Vertical vs horizontal

The structural and functional inclusivity of local CPOs has been described by Wilkinson-Maposa et al (61) as 'poor-on-poor philanthropy'. Using a spatial conceptualization of giving typologized as 'horizontal' versus 'vertical' philanthropy, this approach provides a further insight into CPOs as change agents.

As Wilkinson-Maposa (60: 52) puts it:

'The vertical aid system: i) sees gaps or needs that external resources can fill; ii) is concerned with the quantum of giving (how much, how many), favours financial resources and is concerned with the efficiency of resource use; iii) strives to help people escape poverty; iv) is based on written agreements; and v) recognizes people as legal entities – citizens with rights and obligations.'

The organic helping system, deeply rooted in socio-cultural norms and feelings of belonging, by contrast, i) sees resources within a community that can be deployed to meet that community's needs; ii) focuses on the social transaction of helping, 'no matter how little', with whatever is available – money, labour, support and skills; iii) seeks to increase resilience to cope with, or escape from, current conditions such as poverty; iv) operates according to unwritten yet widely established conventions, values and sanctions; and v) recognizes people as human beings with an identity and dignity that need to be preserved.'

Whilst her analysis makes clear that the practice of most CPOs combines some elements of verticality with more 'organic' horizontal approaches, the two axes neatly

articulate the different philosophical positions highlighted in Section 1 and Fig 3 above: associational vs more radical elements in civil society; 'settled' vs 'unsettling' NGOs; organizations concerned with preserving versus challenging the status quo. This spatial analysis locates the 'top-down' approach of traditional development firmly with the transactional, and horizontal 'grassroots' responses to development needs as potentially transformational. Burns and Worsley's analysis of how change happens makes it clear that CPOs do indeed combine a range of factors which together have potential to effect far-reaching, durable change.

Conclusion

By avoiding the common pitfalls of external development organizations, and by embodying in principle and practice features recognized as likely to support sustainable change, CPOs earn their place in Chambers' (8) 'new ecology' of development. Rooted in their own patch they operate like a rhizome, nourishing their community, and being nourished by it, through a network of cultural and material roots that spread horizontally at ground-level. To an outsider the flowers they produce may look modest, but they generate seed that takes root and thrives because it falls on home soil, and spreads underground into places an outsider knows nothing of. The challenge is to persuade donors to recognize the value of those modest blooms, and the growing harvest that can be reaped from cultivating them. The problem remains, as White and Ramirez (59: 118) put it, that the 'contradictory dynamic within Western modernity is to generalize its own patterns of thought as universal'. Recognizing Escobar's (14) 'alternative rationalities' – the varied social, practical and ethical approaches employed by non-western cultures to govern their interactions – remains a step too far for many donor bodies. To extend the agricultural metaphor, western donors are often so wedded to modern scientific approaches – to the chemical fertilizers and hi-tech machinery that produce uniform, blemish-free crops – that they will not countenance the use of primitive farmyard manure, and recoil from the unpredictably knobby vegetables that result. But they thereby cannot hope to enjoy crops with the flavour and nutrition of local organic produce, grown by hand in home soil and nourishing those who grow them. The Bedouin gardeners I work with universally despise produce imported from Cairo – 'covered in dust and chemicals' – just as they have no time for urban 'experts' who presume to lecture them on desert farming.

Most donors continue to insist on compliance with Western norms, mistrusting values, practices and metrics not validated by Western standards of 'transparency' or 'good practice'. This effectively disbars many communities from support – especially those where formal education has been neglected and culture remains largely oral. Yet no one would assert that conforming to Western standards is sufficient in itself to secure the success of a development venture that lacks other critical factors – local buy-in, for example. So donors have little to lose by being more receptive to local practice. Donor bodies – especially those in the Global North supporting development in the Global

South – must be bolder in recognizing that what usually works locally is more likely to be effective than imposed external rules designed for different cultures. This extends to the legislative frameworks in which donors operate, especially those applying public funds, many of whom are legally obliged to adhere to Western norms of accountability even while recognizing that they may be impossible to achieve on the ground. Donors need to pluck up courage and trust grantees to do things in the way that works where they are – and see what happens. Some projects may succeed brilliantly while others fail – a scenario little different from the status quo, but with the potential to bring real validation and lasting change to communities currently unable to access meaningful support.

At least donors need to consider a multi-dimensional approach that works across both vertical and horizontal axes, blending recognition of local norms with their own success criteria – albeit with the caveat, as Wilkinson-Maposa et al (61) point out, that additional burdens are not placed on poor communities – for example by making grant support conditional on local contributions. If they wish to amplify, support and extend effective local cultures of giving, rather than sweeping them aside within a top-down ‘donor/beneficiary’ relationship, donors need to fundamentally re-envisage their power within that relationship and how it can be used, to facilitate or to crush.

Over many years I have experienced this debate from all angles – as grantmaker, grant recipient and intermediary partner. Nothing is more frustrating than to see local solutions to local issues stymied by heavy-handed, and often high-handed, donor bureaucracy. By contrast nothing is more exciting than to see what people achieve when their own initiatives are facilitated – their skills and ideas recognized, their cultural norms and challenges accommodated and respected. Clark et al (9: 4571–2) stress this point in examining the requirements on researchers working to support conservation interventions in Global South settings. They note that ‘contemporary development is not sustainable development. It leaves too many of today’s people behind’. Their analysis leads them to a prescription that features rarely enough in the literature, yet which could and should stand much current development practice on its head. In what follows, for ‘researchers’ try reading ‘donors’:

‘Researchers need to realize that exogenous conditions (e.g. climate change, political unrest) may overwhelm local socio-environmental system dynamics . . . (I)n the face of the complexity of the systems we seek to understand . . . the ultimate requirement for researchers seeking to produce usable knowledge may be humility’.

For a culture of humility to flourish, western aid bodies need to set aside their reliance on universalized western approaches and learn to trust rather than monitor, support rather than control, facilitate rather than manage. In other words, they need to relinquish – or at least aspire to share – their power in the grantmaking transaction with those best-placed to effect local change. The power-shifting genie conjured by the Johannesburg Global Summit is out of the bottle. It’s time to let it get to work.

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The GFCF works with individual community foundations and other local grantmakers and their networks, particularly in the global south and the emerging economies of Central and Eastern Europe. Through small grants, technical support, and networking, the GFCF helps local institutions to strengthen and grow so that they can fulfil their potential as vehicles for local development, and as part of the infrastructure for durable development, poverty alleviation, and citizen participation.

About the report

A summarized version of this report, using the same title, is also available on the GFCF website (www.globalfundcf.org).

About the author

Hilary Gilbert's career started in the NHS with a focus on improving patient experience (including a stint at the King's Fund). In 1996 she changed tack to become the first Executive Director of Derbyshire Community Foundation, establishing both the Foundation and its nationally-recognized Vickers Art Award. She served six years on the Board of Community Foundation Network (now UKCF), and was an enthusiastic member of the Transatlantic Community Foundation Network. From 2005–2007 Hilary lived in Egypt, where her doctoral research into Bedouin lives led her to set up the Bedouin-led Community Foundation for South Sinai as a vehicle for Bedouin development. She is also co-founder and chair of its UK partner, the South Sinai Foundation. Hilary is an independent member of the South Sinai Research Group at the University of Nottingham, UK.

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