

OUR STRENGTH IS COMMUNITY



Report by
THE CALGARY FOUNDATION
on the 1998
COMMUNITY CONSULTATION

including
SELECTION AND DESCRIPTION OF A
MAJOR COMMUNITY BUILDING INITIATIVE
TO COMMENCE IN 1999

Authored by:
SAMUEL WM. AYLESWORTH, DEBORAH BARTLETT,
BRENDA L. NAYLOR, JAMES H. STAUCH
AND MONICA K. POHLMANN



Mission of The Calgary Foundation

The Calgary Foundation exists to achieve three primary objectives:

- To encourage the increased flow of resources to community needs;
- To create and manage permanent endowment funds to meet those needs, and
- To respond to emerging needs that come with changing times.

On Building Community

“Community is the capacity to come together and to act together to improve public space.”

Janice Stein, 1998

“Community is not a closed accumulation of tradition nor is it a succession of enduring monuments.

It is always being unravelled and so continually must be reknit.”

Adapted from John Updike, 'Hugging the Stone'

“Public space is more than simply a forum for transactions which nurture and sustain individuals.

Community, relationships, the public sphere, the domain of civil society ...

all these themselves have value, and we must continually work to build and sustain them.”

Based on 'The Idea of Civil Society', by Adam Seligman, pages 126 - 143

Key Challenges Of This Study

Can we as a community create a shared vision
strategies, partnerships, & action plans

which truly help us strengthen the third sector &
enhance the realm of public space and civil society?

And what is the role of The Calgary Foundation
in creating and implementing this vision?

Our Strength Is Community

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Foreword

The study that is summarized in this Report was funded jointly by The Calgary Foundation and an anonymous donor. We are grateful to the donor for their continuing confidence in the Foundation and for sharing our enthusiasm for a broadly based and well structured 'conversation' with many community leaders and organizations regarding the future of our city and possible roles for the foundation in achieving that future.

Building on the study, The Calgary Foundation has now decided to undertake the Major Initiative that is described in this Report. It is estimated that the total cost of the initiative will be \$1.21 million. This will be financed by commitments from an anonymous donor (\$560,000), TCF (\$600,000) and Community Foundations of Canada (\$50,000). As a condition of the funding received from the anonymous donor, TCF must raise a total of \$2.5 million dollars in new endowment contributions to the Community Fund and the Field of Interest Funds at TCF by June 30, 2005.

More than 140 representatives from the community participated in the consultation, and we wish to strongly thank all of them for sharing their vision, values and sense of priorities. Their names are listed in Appendices F and G.

The study was designed and implemented by a 'core group' of five individuals: two staff from the foundation and three local consultants. Ongoing counsel and feedback regarding the process and outcomes was provided by an Advisory Committee of nine individuals. The names of these fourteen individuals are provided in Appendixes A and B. We wish to thank each of them for the time and skill they devoted to this study ... a study that we believe will strongly inform and shape the Foundation for many years.

We look forward to receiving comment from the community regarding this report and regarding the Major Initiative we have chosen to pursue, beginning in 1999. Our strength as a foundation and our strength as a city comes from the widely shared commitment to building community, and the desire to applaud and enrich the relationships and the organizations that help to ensure that our community is strong.



Samuel Wm. Aylesworth,
Executive Director of The Calgary Foundation, and
Director of the Community Consultation

March 10, 1999

Executive Summary

RATIONALE FOR THE CONSULTATION

The Calgary Foundation (TCF) is Calgary's community foundation, formed in 1955 by a group of civic-minded individuals to provide a vehicle for citizens to meet a broad range of social, cultural, educational, health care, neighborhood and environmental priorities in Calgary and the surrounding area.

The Foundation has experienced very rapid asset growth over the last seven years in particular. In response to this growth, the Board and staff of the Foundation concluded it would be beneficial to our city to plan for a major community-building initiative that would be consistent with the cross-sectoral and city-wide focus of community foundations. Such a community-building initiative would also help to build donor and community support for other initiatives in the future.

The initiative should:

- strengthen the not-for-profit sector or major aspects of city life as a whole, rather than only one segment or one organization;
- address a larger, long-term issue, to clearly illustrate the impact of major proactive granting efforts;
- help ensure a proper balance in our community between the roles of the individual, the state, the corporate sector, and the not-for-profit sector.

CONCEPTS CENTRAL TO “BUILDING COMMUNITY”

The Foundation decided to organize the consultation around the following key concepts that appear to be central to a deeper understanding of “building community”:

- “collaborative philanthropic leadership”;
- “civil society” and “social capital”;
- “asset-based development” and “building capacity” (commitment, resources and skills), as distinct from a focus on problems and community deficits;
- sector-wide and city-wide partnerships and collaboration, in order to build strong links between donors, leaders and priority issues in all sectors and across the entire not-for-profit sector.

AN OVERVIEW OF THE CONSULTATION

The consultative process consisted of the following components:

- planning, co-ordination and review meetings throughout the process;
- an extensive literature review;
- a two-hour workshop with representatives from fourteen private foundations;
- three half-day workshops with representatives from 129 organizations encompassing all segments of the not-for-profit sector;
- a preliminary evaluation and screening of possible initiatives;
- two follow-up meetings with selected organization and community leaders;
- final evaluation of the initiatives and of this report by the Board of The Calgary Foundation.

TEN STRATEGIC PATHWAYS TO BUILDING COMMUNITY

The literature review and meetings with community leaders and organizations led to the identification of ten strategic pathways to building community. These pathways were subsequently used to generate and evaluate a range of possible community-building initiatives that could be undertaken by The Foundation.

PATHWAY #1	Facilitate city-wide and sector-wide visioning and develop collaborative leadership.
PATHWAY #2	Convene diverse groups and give greater emphasis to a collaborative process when addressing issues.
PATHWAY #3	Support clarification of citizenship-related values and facilitate extensive engagement in civil society activities and issues.
PATHWAY #4	Support organizational development for non-profits and foster increased information-sharing and collaboration within and beyond the not-for-profit sector.
PATHWAY #5	Increase and stabilize core funding and increase project funding. Develop a centralized mechanism to facilitate fundraising.
PATHWAY #6	Give strong priority to activities which affirm and support families and youth
PATHWAY #7	Give strong priority to activities that build healthy neighbourhoods and other smaller communities, and to agency-based activities that emphasize client involvement.



PATHWAY #8	Build broader public awareness of the role, work, and potential of the not-for-profit sector, advocate publicly for the sector as required, and encourage public policy debate and change when appropriate.
PATHWAY #9	Maximize inclusiveness, embracing diversity across all individual and group differences.
PATHWAY #10	Focus on holistic and preventative approaches, rather than on fragmented, problem-focused paradigms.

REACHING CONSENSUS: A SHORT LIST OF TEN AND THEN THREE POSSIBLE INITIATIVES

Building on the key concepts, the ten pathways, and information and insights gathered from the workshops and the literature review, ten possible initiatives were developed. The Consultation Advisory Committee and others reviewed these initiatives, and a short list of three, inter-related initiatives was developed.

The original intent was to choose and implement only one of the ten initiatives. However, as the evaluation process moved forward, it became increasingly clear that three of the projects have significant potential and that each of them complements and enhances the other. In the end, these three were combined into a single, multi-faceted major initiative entitled “Our Strength is Community.”

“OUR STRENGTH IS COMMUNITY”

1. The Calgary Foundation will act as the local coordinator of “**Our Millennium Project**,” a nation-wide program currently being developed by Community Foundations of Canada. The project will encourage Canadians to come together in communities across the country and to reflect upon the kind of community they wish to pass along to people of the next millennium, making symbolic gifts that help create that future.
2. Creation of a new “**Our Strength is Community**” **Grants Program**, with a focus on neighborhood and inter-community development and linkage, and a **Technical Assistance Program** for community-building initiatives. This component was selected because of TCF’s growing interest in projects that encourage civic engagement, values clarification, community development, and the experience of community.
3. Design and implementation of a ‘**Building Community**’ **Information Centre** to build stronger links between philanthropic community leaders, assist in monitoring community issues and priorities, and facilitate fundraising by registered charities. Core to all of this is an elaborate, web-based network of information channels through which those who seek to build community can link with one another with much greater ease than is currently possible.

The Foundation believes implementing these three components together will constitute a solid contribution to building both community strength and not-for-profit organizations. As a group, the three components fit strongly with TCFs unique cross-sectoral role in the community.

It is estimated that the total cost of the major initiative will be \$1.21 million, with financing coming from an anonymous donor (\$560,000), TCF (\$600,000) and Community Foundations of Canada (\$50,000). As a condition of the funding received from the anonymous donor, TCF must raise a total of \$2.5 million dollars in new endowment contributions to the Community Fund and the Field of Interest Funds at TCF by June 30, 2005.

Further, as a separate stand-alone project, the Foundation will explore creation of a **Civic Investment Loan Assistance Fund for registered not-for-profit organizations**. The purpose of this Fund is to improve the financial stability of not-for-profits through loans for capital acquisition, repair financing, working capital, earned-income venture capital, and a variety of other purposes. The use of loans rather than grants will allow TCF to leverage its capital assets and to assist not-for-profits in a new, non-traditional way. An anonymous donor has offered \$150,000 towards this Fund, conditional upon the raising of a further \$150,000 by TCF from other sources. Detail regarding the Loan Fund is provided in Appendix K.

CONCLUDING COMMENTS

The Calgary Foundation is a source of grants for a very wide range of not-for-profit organizations. But it is also uniquely positioned to offer more than grants. Building on the vision and values of those who established its very diverse endowments Funds, TCF now has the potential to become a key “meeting place” in Calgary — a “place” where donors, organizations, and others who strive to build community can work together on major projects that have an impact on city wide and cross-sectoral issues. In addition, the Foundation has the potential to become a central source of research and other information regarding the not-for-profit sector and issues relating to building social capital and civic engagement. It may also serve as a catalyst in the development of new forms of collaborative leadership that will enable our city and the non-profit sector to deal constructively with critical issues and opportunities as these arise.

The Foundation is looking forward to receiving comment from the community regarding this report and regarding the Major Initiative it has chosen to pursue beginning in 1999.



THE CALGARY FOUNDATION *and* BUILDING COMMUNITY

What is The Calgary Foundation?

The Calgary Foundation (TCF) is Calgary's community foundation. It was formed in 1955 by a group of civic-minded individuals as a vehicle for Calgarians to meet a broad range of social, cultural, educational, health care, neighbourhood and environmental priorities.

The Foundation administers endowed Funds, investment income, and new contributions that will benefit the people of Calgary and surrounding area in perpetuity. Some of these endowed Funds allow TCF's Board full or partial discretion over how the Fund's income is used. Grants from these "discretionary Funds" are used to respond quickly and appropriately to current and emerging issues. Similarly, some "donor-advised Funds" provide grants to support current projects. Other, non-discretionary "designated Funds" are used to support the ongoing operating expenses of a wide range of not-for-profit organizations. Individual donors identify the specific organizations they wish to support when the designated Funds are established. Above all, the Foundation provides a flexible vehicle for donors, enabling them to have a long-term impact on issues and organizations that are particularly important to them, to their families, and to the broader community.

Over the last seven years, the Foundation has experienced very rapid asset growth. In 1991, the Foundation administered total assets of \$9 million; as of June 30, 1998, that total had reached almost \$100 million. In 1997-98, over \$4.9 million was distributed to community groups and projects in Calgary.

Although the dollars available for discretionary grants are currently limited to \$1 million per year, this amount will increase as the Community Fund and the Field of Interest Funds builds and grows. As a granting organization, the Foundation's focus is increasingly on long-term legacy initiatives that address today's issues while building a stronger tomorrow.

What is The Calgary Foundation's Unique Role in Our Community?

Living the public trust, community foundations face an awesome task in grantmaking — to spend carefully but creatively, to honour donors while exercising independent judgement, to move inexorably forward with fairness and accountability to¹all.

As a community foundation, The Calgary Foundation contributes to the life of this city in both tangible and intangible ways. A community foundation contributes the following value-adds to a community:

- By being an endowment builder, as opposed to a fund-raiser, The Calgary Foundation can "set its clock ahead to future generations." Few funding bodies have this capability, which provides a unique opportunity to think strategically and act long-term.

¹ Magat, *The Agile Servant*, 1989, p. 52

- By growing and stewarding permanent endowment funds supported by many donors, TCF encourages individuals with sizeable resources as well as those of more modest means to work together in large-scale philanthropic project. Engaging donors and potential donors yields many non-financial benefits. It promotes neighbourliness and social responsibility. It channels our impulse of charity, justice, and compassion to serve the public good and to give of ourselves.
- Through the responsive distribution of funds, TCF provides an accessible and democratic vehicle through which local vision and commitments can be expressed in ways that build on existing assets, and address ever-changing challenges and opportunities.
- Because of its ability to link donors to the community in perpetuity, TCF can help to meet the needs in many complex areas of interest and sectors, with a citywide focus.
- Through its substantial volunteer base, TCF continuously seeks to be broadly representative of the community. Since this base includes individuals from all sectors and a diversity of positions on current issues, it serves as a microcosm and laboratory for collaboration.
- TCF does not limit its work to any single sector; therefore, it serves as a meeting ground for individuals and organizations with differing views. Because the Foundation is not controlled, either by those who give to it or by those who benefit from its gifts, it can embrace a sense of community that exceeds individual interests, and strive to be a guardian of fairness and integrity in conflict resolution processes.²

What is the Building Community Consultation Project?

In 1998, The Calgary Foundation completed a consultative process designed to address two major goals: to identify long-term community building issues currently facing the charitable sector and the wider community, and to determine how the Foundation might better respond to these issues. This report provides a summary of the consultation project, a review of key concepts and professional literature, and a description of a cluster of initiatives the Foundation intends to undertake to assist in building this city. These initiatives will enhance the vitality and cohesiveness of this already strong community. Furthermore, they will greatly facilitate the work of the very broad range of charitable organizations that currently provide so much to Calgary.

The first steps toward the consultation were taken in mid-1996 in response to TCF's rapid growth. At that time, the Foundation's Board and staff began seeking new ways to identify and respond to priority issues throughout Calgary. At the same time, long-standing supporters were encouraging the Foundation to introduce a "proactive granting program" to complement the highly valued reactive and interactive granting program. This program, which was introduced in September 1996 with modest annual funding of \$50,000, allows TCF to take the initiative when appropriate, to identify issues that are important to the city, and to address them directly, either alone or in partnership with others. TCF staff and Board also began to read more widely about the challenges and opportunities associated with such strategic grantmaking.

These local developments were buttressed in May 1997, when Foundation representatives attended a conference of Canadian community foundations organized by Community Foundations of Canada and supported by a grant from the Walter and Duncan Gordon Foundation. The focus of the conference was



community-building initiatives and processes, and the participants discussed the skills required to convene and work more closely with diverse groups from the community. Of particular note were presentations on community-building initiatives by the Ford Foundation and nineteen community foundation partners in the United States, and an inspiring address by Dr. Janice Stein, the Harrowston Professor of Conflict Management and Negotiation at the University of Toronto, who emphasized the growing worldwide need for “safe space for respectful and creative conversation.”

The Foundation also benefited from a close study of The Social Reconnaissance Project, which was undertaken by the Vancouver Foundation in 1997-98. The Vancouver Foundation’s findings led them to conclude that the appropriate role for a community foundation has six dimensions.

These include: continuing to engage strongly in responsive grant-making; strengthening both the community capacity and the capacity of the not-for-profit sector; promoting voluntarism; encouraging the development of new public policy, and promoting philanthropy.

By the fall of 1997, the Foundation concluded it would be both beneficial to Calgary and fully appropriate to TCF’s mission and role to plan a major community-building initiative which met the following three criteria:

- The initiative should strengthen the not-for-profit sector or major aspects of city life as a whole, rather than only one segment or one organization. This would be consistent with the cross-sectoral and citywide focus of a community foundation.
- The initiative should address a larger, long-term issue in order to clarify the impact of major, proactive granting efforts. This would help to build donor and community support for other possible future initiatives.

- The initiative should help to ensure a proper balance in our community between the roles of the individual, the state, the corporate sector, and the not-for-profit sector. This expresses TCF’s commitment to a very wide and realistic view of community, a view that encompasses but is not limited to any of these four facets of society.

At this point, a small number of private foundations in the city offered tentative endorsements for such an undertaking. Some indicated they might be willing to participate in funding the initiative if the Foundation identified a major project that was appropriate to its role as a community foundation and of value to Calgary. Other “friends of the Foundation” also expressed strong support in principle for the study.

In February 1998, the Foundation’s Board gave formal authorization for the consultative process to begin, and a set of screening criteria was developed to assist in evaluating possible initiatives (see Appendix J). The Executive Director was asked to lead the consultation, and he enlisted co-ordination support from the Director of Grants and Community Initiatives. A team of three local consultants and one consultant from Vancouver were hired to help design and carry out the process, and an advisory committee was created to provide ongoing feedback and counsel regarding the design and adequacy of the consultation. The committee included four Board members and four members from the community (see Appendices A and B).

Components of the Process

The consultative process itself consisted of the following components:

- Planning, coordination and review meetings throughout the process
- An extensive literature review by the local consultants and the Director of Grants

- A two-hour workshop with representatives from 14 private foundations
- Three half-day workshops with representatives from 129 organizations encompassing all segments of the not-for-profit sector (community development, health, arts and culture, social services, education, environment, and recreation)
- A preliminary evaluation and screening of possible initiatives by members of the Advisory Committee and other members of the TCF Board
- Two follow-up meetings with selected organization and community leaders, to review and evaluate the cluster of initiatives set forth in the conclusion of this report
- A final evaluation of the initiatives and of this report by the Board

In summary, the key challenges of this “building community” consultation were seen to be: Can we as a community create a shared vision, strategic partnerships, and action plans that truly help strengthen the not-for-profit sector and enhance the realm of public space and civil society? And what is the role of The Calgary Foundation in creating and implementing this vision?

Key Concepts Summarized

When any organization undertakes a process reflection and action of this magnitude, it is important to start by defining the critical underlying values and themes. TCF chose to organize its reflections and planning around the following concepts that appear to be central to a deeper understanding of “building community:”

- “Collaborative philanthropic leadership”:
“How” do foundations help to build community?
- “Civil society” and “social capital”:
“Why” do we build community?

- “Asset-based development” and “building capacity” (commitment, resources and skills), as distinct from a focus on problems and community deficits: “What” is our focus?
- Sector-wide and citywide partnerships and collaboration: “Who” are our partners within and beyond the not-for-profit sector?
- Strategic identification of community-building opportunities: “Where” are the priorities, and what is TCF’s role in meeting them?

Briefly, “civil society” is an abstract concept with a long western history dating from the Renaissance (see Appendix H). It encompasses such notions as social capital, citizen action, concern for the common good, and respect for democratic values. The concept of “civil society” is intimately connected to but not necessarily synonymous with the not-for-profit sector.

“Asset-based development” and “building capacity” refer to nurturing the innate knowledge, resources, and skills of a community, rather than focusing on its problems and deficits. This emphasis builds individual and community confidence, commitment, and ability to interact with fellow citizens and organizations to effect change. The term “collaborative philanthropic leadership” describes TCF’s preferred style and role as it works to strengthen “civil society” through building community and organizational capacity.

These concepts were selected for critical review because the Foundation believes they are central to making an informed choice amongst possible new directions and major initiatives. By taking these terms seriously, TCF believes it can play a stronger part in keeping Calgary a healthy and vibrant community and it will be well-positioned to contribute to a better future for all Calgarians. (See **Exploration of Key Concepts** on pages 1ff of Volume II, for further more detailed discussion of each of these central concepts).



COMMUNITY CONSULTATION *Summarized*

Following completion of the literature review, a meeting with the private foundations, and a study of exemplary initiatives, TCF held three workshops, which were attended by 129 representatives from the not-for-profit sector.

In order to promote discussion around community priorities and possible initiatives, the local consultants designed a process to encourage open and extended conversation among participants. The process followed the format below: (See Appendix C)

- An introduction to TCF and the community consultation process was provided.
- In small groups structured to include representatives from across the sector, participants shared stories about their “best work.” This allowed all participants to discuss the focus, values and priorities of their respective organizations and to place these within the context of the wider setting of the group. The group encompassed health, arts and culture, education, social services, environment, recreation and community association representatives.
- Participants then identified the key factors that help them to accomplish their best work, as well as the factors that limit their capacity to do more of what they value most highly. They were also asked to comment on what they perceived to be “the greatest opportunities currently apparent for strengthening community in Calgary.”
- In larger groups, participants brainstormed about possible larger, sector-wide and community-wide initiatives that would best strengthen the community. At the end of this process, 143 larger ideas and initiatives had been proposed.

- Small groups then debated and ranked the initiatives. Then, in an attempt to identify major areas of agreement and common themes among a number of initiatives, the participants shared their views in larger and larger groups.
- The workshop ended with an exercise in ‘dotmocracy’, in which each participant was given five coloured dots and asked to mark preferences among all the initiatives identified during the workshop.

The Foundation was surprised and pleased by the enthusiastic response of the participants and by the wide range of ideas generated at each session. For their part, the participants appreciated the opportunity to speak with other committed individuals from across the sector. They also welcomed the examination of ‘civil society’, which they felt provided insight into the values and vision that shape society at a deep level, taking us beyond our important but more narrow day-to-day concerns and allowing a broader understanding of and vision for our future. (For further more detailed information on the Workshops, see the **Exploration** on pages 9ff in Volume II, and see Appendices D, E, and F).

MOVING FORWARD: TEN STRATEGIC PATHWAYS *Summarized*

Based on a review of the literature and of our discussions with the 129 workshop participants, the Foundation identified ten major “pathways to community” that seem to hold promise for work in this area.

All of these pathways were used to generate and evaluate the community-building initiatives summarized later in this report.

PRIMARY PATHWAYS TO BUILDING COMMUNITY

The first five pathways are considered primary to building community in Calgary at this time. All the possible initiatives embody at least one of these five:

1. Facilitate citywide and sector-wide visioning and the development of collaborative leadership concepts, process and skills, all with a focus on capacity and potential, rather than on limitations, problems, and needs.
2. Increase emphasis within the sector and throughout the city on convening diverse groups, as well as on working collaboratively to address citywide and sector-wide issues.
3. Support clarification of citizenship-related values and facilitate extensive engagement in civil society activities and issues.
4. Support organizational development for non-profits as a complement to the current emphasis on programs and projects, and foster increased information sharing and collaboration within and beyond the not-for-profit sector about the sector.
5. Increase and stabilize core funding in particular from many sources; increase project funding. Develop a centralized mechanism to facilitate fundraising, and provide support to ensure that all agencies and the public can access this centralized source. In this way, an overly high proportion of agency resources will not be devoted to raising dollars simply to ensure programs survive. (Workshop participants deemed this fifth pathway to be critical to the building of civil society)

Collateral pathways

These five pathways serve to focus the primary pathways:

1. Give high priority to activities that affirm and support families and youth, on the assumption that the strength of community is strongly correlated with the strength of family and with the ongoing affirmation and inclusion of youth.
2. Give high priority to activities that build healthy neighbourhoods and other smaller communities, and to agency-based activities that emphasize client involvement. Civil society is defined by and is dependent upon a thick network of meaningful relationships and these relationships typically centre around issues that are first experienced at a local and personal level.
3. Build broader public awareness of the role, work and potential of the not-for-profit sector, advocate publicly for the sector as required, and encourage public policy debate and change when appropriate. Investigate the possibility of creating a Quality of Life Commission or a Chamber of Charities that would provide a focused voice for the sector as a whole and allow a forum for reflection on broader issues of importance to the entire community.
4. Maximize inclusiveness, embracing diversity across all individual and group differences — cultural, racial, economic, educational, registered versus non-registered status with Revenue Canada, social status, etc.
5. Focus on holistic and preventative approaches rather than on fragmented problem-focused paradigms.

*Extended comments and a bibliography relating to each of the ten pathways are provided **Exploration of the Ten Strategic Pathways** pages 11ff in Volume II.*



THE MAJOR INITIATIVE

The first steps in identifying and evaluating possible larger initiatives

Building on the careful definition of key terms and the list of ten pathways, the Foundation then turned to the task of identifying and evaluating possible larger initiatives to be undertaken by TCF in partnership with others in the future.

The Foundation first developed and reviewed a list of exemplary initiatives undertaken in other cities. This was followed by a careful study of the 143 major ideas and initiatives proposed during the consultation workshops. Related ideas were grouped and then linked with one or more of the ten strategic pathways to building community (see Appendix E).

Although each group focused primarily on one or two of the “pathways to community,” it soon became obvious that each group of ideas and each initiative embodied a number of other pathways. This point is emphasized throughout the report to clarify that designing and selecting effective initiatives is both an art and a science!

On the one hand, it is desirable to embody as many of the major pathways as possible in each of the possible initiatives, since the pathways reflect the assumptions, values, and priorities that are most important to the workshop participants and to the authors surveyed. However, the initiatives must also embody TCF’s primary assumptions, values, and priorities. They must reflect the unique role of a community foundation and a sense of what can truly be achieved in our city at this time.

The following themes were used to group the 143 ideas and initiatives proposed by workshop participants:

- Strengthen leadership by and within both the not-for-profit sector and the wider realm of civil society (63 votes)
- Improve funding and other resource support for the sector and for initiatives that focus on building community (58 votes)
- Develop an advocacy organization for the sector such as a Chamber of Charities — and work on improving communication about and public awareness of the sector (53 votes)
- Facilitate value clarification and cultural changes (46 votes)
- Encourage citizen engagement and community-building, with a focus on neighbourhoods and families (38 votes)
- Encourage increased sharing of information, resources and organizational skill development within the sector (33 votes)
- Encourage more collaboration and partnerships around programming (19 votes)
- Change how agencies work, in a variety of specific ways (18 votes)

Developing a Short List

In response to proposals, information, and insights gathered from the workshops and from the literature review, a list of ten possible initiatives were developed for consideration by The Calgary Foundation. The Consultation Advisory Committee and others reviewed these initiatives, and eventually a new short list of three inter-related initiatives was developed.

Each of the ten initiatives was described using the following template:

- a) Key idea driving the initiative
- b) Objectives of the initiative
- c) Linkage with the ten pathways to community
- d) Implementation strategies

This approach provided the Foundation with a brief but powerful summary of each of the initiatives. It also clarified how each of them links with the community-building strategies identified through the literature review and workshops. *(A more detailed description and evaluation of each of the ten proposed initiatives is provided in **Exploration of Possible Initiatives** on pages 19ff in Volume II.)*

At first, TCF intended to choose and implement only one of the ten initiatives; however, as the evaluation moved forward, it became increasingly clear that three of the projects have significant potential and that each of them complements and enhances the others. In the end, it was decided to combine these three into a single, multi-faceted major initiative. The initiative, entitled “Our Strength is Community,” is described both in summary form and in detail in the pages that follow.

Further, as a separate stand-alone project, the Foundation will explore creation of a Civic Investment Loan Assistance Fund. The purpose of this Fund is to improve the financial stability of not-for-profits through loans for capital acquisition, repair financing, working capital, earned-income venture capital, and a variety of other purposes. The use of loans rather than grants will allow TCF to leverage its capital assets and to assist not-for-profits in a new, non-traditional way. An anonymous donor has offered \$150,000 towards this Fund, conditional upon the raising of a further \$150,000 by TCF from other sources. Detail regarding the Loan Fund is provided in Appendix K.

Feedback from Community representatives on each of the chosen initiatives is provided in Appendix I.

THE MAJOR INITIATIVE “OUR STRENGTH IS COMMUNITY”

The over-arching theme of the community consultation has been building and strengthening community. A common thread ties together the three projects selected for this initiative. This thread relates to the network of values, commitments, civic engagement, and connectedness that undergirds and unites our community. The major initiative will, therefore, include the following components:

- Our Millennium Project
- Neighbourhood Grants Program
- Calgary Civic WebSite

The details of each component are as follows:

1. TCF PARTICIPATION IN THE “OUR MILLENNIUM PROJECT.”

Currently being developed by Community Foundations of Canada (CFC), this nation-wide program, will encourage Canadians to come together in their communities to reflect upon the kind of community they wish to pass along to those who will succeed them in the next millennium, and to make symbolic gifts to help create that future. The gifts — gifts of time, money, energy, and commitment — signify the hopes, values, and priorities of Calgarians for the future well being of the community. TCF believes the Project will both affirm and strengthen the values, vision, and widespread commitment that have built this community and will enrich it in the future. This work will be undertaken in Calgary in partnership with Calgary 2000.



DETAILS

- Early in 1999, a Millennium Projects Animator will be hired by TCF to work with the Calgary community in celebrating the millennium. The project will be a highly visible public statement of the Foundation's commitment to building community by affirming and encouraging widespread citizen participation in the life of the city.
- The Our Millennium Project Animator will co-ordinate extensively with the national campaign, beginning with the national launch of a document entitled "A Catalogue of Possibilities — Gifts to Our Communities, Gifts to our Future" in early 1999. This catalogue will contain hundreds of ideas, large and small, for individuals and communities seeking to make a difference. The TCF Animator will work with groups to develop the following kinds of projects:
 - a) **Peace Garden** Plant a peace garden in your local park, at the community centre, or in the schoolyard. This creative gift is a natural place for conflict resolution.
 - b) **Yellow Fish Road** Make a plastic stencil of a fish. Using non-toxic yellow paint and a paintbrush, mark the storm drains and sewers in your neighbourhood with a yellow fish. The symbol will serve as a reminder that what goes into these drains and sewers ends up in our rivers and streams, the natural habitat of fish and other aquatic animals and plants, and the source of much of our drinking water.

- c) **The Walking School Bus** Parents and caregivers take turns walking groups of children to and from school. The regular walks will allow everyone to get a little exercise, to explore the nooks and crannies of the neighbourhood, and to watch the changes of the seasons. This gift will cut down on the number of cars on the road and make the air we breathe a little cleaner.

Focus group participants endorsed the Foundation's involvement in "Our Millennium Project". As one of them remarked, *"These days we often feel that we cannot make a difference. An initiative such as this reminds us that there are many things, small and large, that will make a difference — because relationships and people make the difference. Building on what we can do — on our assets — will make sense to people."*

RATIONALE

1. Our Millennium is a non-monetary way to participate in building the Calgary community
2. It is an opportunity to speak about the Foundation's commitment to selected pathways to building community
3. TCF's grantmaking will be enhanced by new partnerships and understanding of the priorities and gaps in the community
4. Our Millennium will increase the profile of the Foundation and emphasize the cross-sectoral nature of the grants
5. The convening opportunity will build TCF's local leadership role and introduce potential volunteers to the Foundation
6. Our Millennium will serve as the launch of the Major Initiative, especially the Neighbourhood Grants Program

2. “OUR STRENGTH IS COMMUNITY” NEIGHBOURHOOD GRANTS PROGRAM

This new program will focus on neighbourhood and inter-community development and linkage, and will support TCF’s growing interest in projects that encourage civic engagement, value clarification, community development, and the experience of community. By focusing directly on neighbourhood and the links between them, on the values and forces that work for and against social cohesion, and on the experience of “community,” we will be challenged to learn more about our culture. This focus will help to sustain the deeper dynamics of our culture — the commitments, root values, root metaphors, generative themes, and skills that have given rise to our civil society and to the not-for-profit sector. Clearly, the Foundation’s work in this area will extend beyond charitable organizations to more clearly encompass the realms of community and civic engagement.

DETAILS

- The Neighbourhood Grants Program will —
 - a) increase the base of participation and leadership in neighbourhoods;
 - b) increase the financial and other resources available for neighbourhood visioning and self-help efforts;
 - c) increase the capacity of community organizations to plan and implement neighbourhood improvement strategies;
 - d) provide very concrete skill enhancement opportunities for individuals, organizations, and multi-neighbourhood groups (conferences, information sharing, workshops, etc.) through a technical assistance component.
- Successful projects will be chosen to reflect the following highly regarded community development values:
 - a) Community members define the opportunities, challenges and solutions.
 - b) Community members are central to all decision-making.
 - c) Community members are encouraged and supported to build their skills and knowledge.
 - d) Projects must foster respect for all, with a deepening understanding of inclusion and diversity.
 - e) An increasing emphasis will be placed on trust and openness.
- This Fund will be in addition to, and smaller than, TCF’s regular community grants program, though a formal granting process will be used to decide on the allocation of funds.
- The Neighbourhood Grants Program will involve the disbursement of \$200,000 per year. One half of this will come from TCF’s current discretionary granting budget — approximately 10 per cent of the current total — and half will come from an annual matching contribution from an anonymous donor.
- At the end of its designated five-year period, the program will be carefully reviewed to clarify its contribution to building community.
- A Neighbourhood Grants Advisory Committee will be established by TCF to review and make recommendations on community funding requests. This group will include individuals active at the community or neighbourhood level. All final decisions on the Neighbourhood Grants Program rest with The Calgary Foundation.
- The program will likely involve a mix of many small grants (to a maximum of \$5,000) and a smaller number of larger grants.



RATIONALE

1. The literature in this area is increasingly demonstrating the importance of neighbourhood-based community development.
2. Many needs and capacities are unique to specific localities; they must, therefore, be affirmed and nurtured locally.
3. Citizens and service providers are showing a preference for community-based delivery of services — e.g., health and social services.
4. Calgary has a strong and unique history of semi-autonomous community associations governing reasonably sized geographic areas. TCF wishes to become more informed about and involved with these groups.
5. Participation at the neighbourhood level is a very effective and empowering form of involvement in the community, one, which is suited to large numbers of citizens. Effective participation at this level often leads to broader civic engagement.

ILLUSTRATIVE CASE STUDIES

A Strategic Plan for Neighborhood Transformation — Mayfair, California

The Strategic Plan for Neighborhood Transformation in Mayfair, California, identified seventy-six community development projects to be implemented over the next six years. These projects will address, in a comprehensive fashion, the social and economic issues that the community deems to be of the highest priority

The plan is unique in its approach and in its recognition that all elements required to bring about social and economic change in the Mayfair neighborhood are inter-related and build on one another. Integration, coordination and cooperation are vital requirements. The plan was founded upon the belief that effective,

deep-rooted, and long-term solutions to poverty and disinvestment can be achieved only if the community itself works to bring about its own transformation.

The Boston Persistent Poverty Project

In 1990, the Boston Foundation was grappling with the question of how best to listen and respond to the needs of its community. At the end of a five-year anti-poverty program, the Foundation had come to the “sober realization that government and, by extension, the larger society, has broken its social contract with those in struggle, with calamitous results for increasing numbers of people across the community and the nation.” Clearly, it was important to redefine community needs.

The Boston Persistent Poverty Project, a broad-based campaign sponsored by the Foundation in 1991, decided to pursue a new social contract, one that would recognize and honour the rights, responsibilities and interdependence of all members of the community. The project convened a Strategy Development Group, most of whose forty-three members had experienced poverty first-hand. The goal was to develop a new approach for action, one that would reinvigorate public and private institutions by putting the will, creativity, and imagination of citizens at the centre.

Hundreds of low-income residents representative of city’ ethnic, racial, and social diversity attended roundtables and focus groups that were held in seven languages.

From this “deep listening” process emerged a 1994 report titled “Guiding Principles for a New Social Contract.”

The report outlined a map for Boston and other communities seeking to create an atmosphere of respect and encourage participation by their low-income residents.

The Boston Foundation decided to focus its funding on community-building strategies that help children and their families overcome poverty. To this end, the project’s strategy group developed seven principles focusing on individual, family and community strengths such as extended family networks, small businesses, religious and civic institutions, and cultural traditions.

3. THE “BUILDING COMMUNITY” INFORMATION CENTRE AND CALGARY CIVIC WEBSITE.

The goal of this component is to build stronger links between philanthropic community leaders, to assist in monitoring community issues and priorities, and to facilitate fund-raising by registered charities.

At the heart of the Centre is an elaborate, web-based network of information channels through which those who are seeking to build community can link readily with one another. The web-site will be complemented by an increasing emphasis on convening and partnering by TCF, and by the provision of research information relevant to the not-for-profit sector and community development. This will allow the Foundation to use its unique position to promote both sector-wide reflection and the building of community throughout Calgary.

DETAIL

A detailed proposal for the web-site was prepared by the local consultants, with input from a web-site and database consultant, and was edited by TCF's Executive Director to clarify the unique contribution TCF will bring to the project. The web-site may be implemented over a number of months, module by module, providing access to a full range of valuable information for not-for-profits, funders and donors.

The intent is to develop and maintain a one-stop, web-based information site for funders, donors, project proponents, the media, and the public. Biannual, sector-wide consultations on community issues and priorities will ensure that all information provided on the web-site is current. In the long-term, the site could also serve as a research resource, listing and summarizing research studies relating to Calgary-specific and not-for-profit sector issues, and would support a detailed analysis of key issues important to the sector and the city.

In its early stages, the focus of the web-site would be on providing details regarding TCF itself, including —

- granting priorities and summary of the grant review process;
- an Internet-based application form for direct submission of funding requests;
- a gateway to permit the review of applications in the system by donors and other friends of the Foundation;
- summaries of all grants approved in the past year and highlights of some of the major developments at TCF in the recent past;
- tax-related information for prospective donors and professional advisers.

Summary information on a broad range of other funding organizations would then be added, along with links to those groups. Private foundations could be a starting point for this, followed by links with some or all of TCF's partners in the “Funding Partners Project.”

As the system is built, detail on the other funders would be added, so they, too, can receive applications directly over the Internet. The Foundation would seek to achieve agreement on a common application form, with provision for additional specialized fields that can be customized by funders.

Information summarizing the Foundation's sense of community priorities would eventually be built in, and a coding system developed so that TCF (or some other party) could code each application relative to perceived priorities. This coding could then be used by other funders and by private donors to assist in their review of the applications. As background to this process, mechanisms will be developed whereby charitable organizations, community associations, and others interested in the not-for-profit sector and community development can provide quantifiable



input regarding their sense of community priorities. This information will be reviewed and incorporated into an applications-coding system.

Annual or biannual community consultations will be undertaken to ensure that data regarding community priorities is current and that the links between these consultations and the priority and coding used at the web-site are clear. The coding system will allow TCF to summarize the applications that were funded and how the funding correlates with TCF's knowledge of community priorities. The community, charitable organizations, and other funders will receive ongoing feedback about the use of the site by funders, planners, and applicants, as well as the funding relative to a general coding system and to community priorities.

In its later stages, the project will incorporate an annual budget that will allow TCF and other funding organizations to help not-for-profits purchase the hardware and software required to access this new technology.

RATIONALE

Calgary does not yet have a system through which donors, funders, not-for-profits, and the public can learn about and express support for the scope, successes, and challenges of philanthropic and citizenship endeavours in the city. The WebSite is proposed as a first step towards the goal of improved communication among all those concerned.

For example, individual donors and private foundations would appreciate having a centralized registry of charitable activities they can peruse at their convenience, along with a more efficient mechanism for locating and reviewing a broad range of funding requests which potentially match their own priorities and the priorities of the community. A centralized information resource would greatly reduce the time not-for-profits currently spend generating full-funding proposals, marketing their work, and seeking financial support. Ready access to relevant material

— data, studies, and services — could enhance the practice of philanthropy and citizenship by all interested parties.

The Calgary Civic WebSite will offer the following benefits:

To the donor community

- enables donors to familiarize themselves more readily with gifting, granting, and community-building opportunities
- allows donors to strategically match their priorities with community initiatives and detailed information regarding community priorities
- ensures a level of anonymity where desired

To the not-for-profit sector

- consolidates information regarding available funding and other support, increasing efficiency when searching for funds
- encourages learning from the experiences of other organizations and from funders, across the breadth of philanthropic and citizenship initiatives
- reduces time spent marketing initial proposals, enabling an efficient "match" with donors, and making it possible for multiple potential supporters to express interest simultaneously at the outset of project planning

To The Calgary Foundation

- builds on TCF's strengths in and commitment to convening across the wide spectrum of not-for-profit activity
- enhances donor access to new granting opportunities without intermediation by TCF when this is preferred
- demonstrates one important dimension of collaborative philanthropic leadership by Calgary's community foundation

For all

- helps donors, not-for-profit groups and the public come to view themselves as partners in a common project (creation of the WebSite) and in the broader task of building community
- provides a central site through which the public can learn about and support the scope, successes and challenges of philanthropic and citizenship endeavours in Calgary
- enables direct connections between agencies and donors pursuing similar goals

TCF believes implementing these three components together will constitute a solid contribution to building both community strength and not-for-profit organizations. Together they fit strongly with TCF's unique cross-sectoral role in the community

COSTS AND RESOURCES FOR THE MAJOR INITIATIVE & THE CIVIC LOAN FUND

The total cost of the major initiative and of the civic loan fund is estimated to be \$1.51 million. Pending final confirmation from various funding sources, it is intended that this amount will be funded as follows:

- Up to \$50,000 will be provided by Community Foundations of Canada, to support work on the "Our Millennium Project." It is not yet clear whether other local resources will also be required.

- \$500,000 (\$100,000 per year for five years) to support the "Our Strength is Community" Neighbourhood Grants Program will come from TCF's budget for discretionary grants. This amount will be matched by contributions from an anonymous donor, thereby providing \$1 million over five years for this new program.
- To receive this matching contribution, TCF has committed to raising \$2.5 million over the next five years as endowment capital for the Community Fund and the Field of Interest Funds at TCF.

\$100,000 (\$20,000 per year for five years) to support the design, implement and maintain the Calgary Civic WebSite, will come from TCF's budget for proactive grants, if necessary. (We will seek to raise some or all of these funds from other sources.) This \$100,000 will be supported by an additional \$60,000 from an anonymous donor in the first year, to help cover start-up costs. Depending on total costs, TCF may request additional support of \$20,000 per year from a number of private foundations for Years Two, Three, Four, and Five.

- An anonymous donor has agreed to provide \$150,000 towards the Civic Investment Loan Fund, conditional upon the Foundation's raising a further \$150,000 from other sources — i.e., corporations, private donors and other funders.



CONCLUDING COMMENTS ON THE MAJOR INITIATIVE

The Calgary Foundation's understanding of the deeper values, visions, and commitments that shape our culture and the not-for-profit sector has been enhanced by the literature review and the workshops with community organizations and leaders. This, in turn, has enriched The Foundation's understanding of the varied contributions that a community foundation can make to a city and to the many community organizations its citizen's value. The consultation has also alerted the Foundation to the significant challenges involved in a conscious commitment to the work of building community.

The Calgary Foundation is a source of grants for a very wide range of not-for-profit organizations, but it is also uniquely positioned to offer more than grants. Building on the vision and values of those who established its very diverse Endowments Funds, TCF now has the potential to become a primary "meeting place" in Calgary — a "place" where donors, organizations, and others who strive to build community can work together on major projects to have an impact on city-wide and cross-sectoral issues. TCF may also become a central source of research and other information regarding the not-for-profit sector and issues relating to building social capital and civic engagement. Furthermore, the Foundation has the opportunity to become a catalyst in the development of new forms of collaborative leadership that will enable the community to deal constructively with critical issues and opportunities as these arise.

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APPENDICES

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APPENDIX A

About the Authors

SAMUEL WM. AYLESWORTH, *CONSULTATION DIRECTOR*

Sam holds a B.Sc. in general science, an S.T.B. in anglican theology, and an M. Sc. in experimental psychology, plus additional training in accounting, finance and portfolio management. He joined TCF as executive director and CEO in December 1995, following thirteen years of work in the same capacity with the Nickle Family Foundation. His current priorities within TCF are visioning and strategic planning, clarification of approaches to building community, internal systems development, and communications and marketing relative to TCF, the not-for-profit sector and the domain referred to in the report as 'civil society.'

DEBORAH BARTLETT, *DIRECTOR OF GRANTS AND COMMUNITY INITIATIVES AT TCF*

Deborah holds a Master's and a Bachelor's degree of Social Work, and a Graduate Diploma, Human Resources Management. She has over twenty years of management experience with twelve of these as an executive director of a number of not-for-profit organizations. Deborah has strengths in program planning and development, human resources, fund raising, financial management, program evaluation and facilitation.

BRENDA L. NAYLOR, *SENIOR EXTERNAL CONSULTANT TO THE PROJECT*

Brenda holds a Master's degree in Environmental Design (Planning) and a Diploma (Honours) in Civil Engineering Technology. She has strong interest and experience in the not-for-profit sector dealing with a broad range and scale of organizations and projects, from international to provincial and local level institutions, including volunteer and staff management, strategic planning and project design, monitoring and evaluation.

JAMES H. STAUCH, *EXTERNAL CONSULTANT, RESEARCHER, FACILITATOR*

James holds a Master's degree in Environmental Design (Planning) and a B. A. (Honours) with a major in geography. Building on a strong interest in 'civil society', he has designed and consulted to a range of projects relating to development of a housing trust fund, community development for First Nations groups, policy development relative to community economic development and urban design issues, and exploration of the role of civil society in the context of resident participation in housing.

MONICA K. POHLMANN, *EXTERNAL CONSULTANT, RESEARCHER, FACILITATOR*

Monica holds a Master's degree in Environmental Design (Planning) and B.Sc. (Honours) in Horticulture. She has a strong interest in the concept of 'civil society' and in principles and planning processes for citizen participation in sustainable community development. Further, she has considerable knowledge of Calgary's community development sector, and of related current issues, stakeholders and emerging opportunities within this sector.

APPENDIX B

About the Consultation Advisory Committee

J. BRUCE DUNLOP, FCA, CHAIR OF THE BOARD

Retired Partner and former Managing Partner of Price Waterhouse Calgary, Past Chairman of Calgary United Way and Calgary Philharmonic Orchestra, Member of the City of Calgary Tax Review Committee 1995-1997, Chair of the CHRA Inner City Community Health Task Force 1995-1997, member of The Calgary Foundation Board of Directors since 1994.

DR. RALPH STROTHER, VICE-CHAIR

Dr. Strother is a retired Associate Professor in the faculties of Medicine and Kinesiology, University of Calgary. During his tenure he served on numerous University committees, taught extensively and performed research. He published several articles in the medical literature and currently serves on the editorial boards of journals. He is the co-founder and CEO of FITforeGOLF Inc., as well as the CEO of Stratimed Limited. Dr Strother has been a board member of The Calgary Foundation since 1996 and currently serves as its Vice Chair.

DR. MICHAEL P. HEFFRING

President, Environics West marketing research firm. Recently prepared Alberta survey used to guide Alberta's Growth Summit, Co-Chair of The Calgary Foundation Development Committee, member of The Calgary Foundation Board of Directors since 1992.

VIRGINIA STEWART

Ms. Stewart has been a member of The Calgary Foundation Board since 1992. As a member of the Board, she has served as Chair, Grants Committee as well as Chair, Children, Youth and Families Advisory Committee. Her commitment to community is exemplified by her involvement in a variety of committees and boards in the not-for-profit community including Carewest Development Council. Virginia sees herself as a grass roots volunteer and hopes that through her involvement in whatever way, the quality of life of the people of Calgary will be improved.

JAMES K. GRAY

Mr. Gray co-founded Canadian Hunter Exploration Ltd in 1973. He is presently Chairman of Canadian Hunter, one of Canada's larger natural gas producers. Mr. Gray has participated in a wide range of community activities and projects. Among his current activities, he is co-chairman of the Calgary Economic Development Authority, Chairman of the Canada West Foundation, a member of the Board of Governors of the Calgary Academy, Honourary Chairman of the Science Alberta Foundation, Honourary Life Chairman of the Calgary YMCA, and a member of the Board of Governors of the Duke of Edinburgh's Award Charter for Business. He was appointed an Officer of the Order of Canada in 1995.

BRIAN S. HUNT

Mr. Hunt is Executive Vice President, Corporate Development of The Westaim Corporation. Prior to this he was Executive Vice President and Chief Financial Officer, Stewart Green Properties Ltd. and Senior Manager, National Bank of Canada. Mr. Hunt has an M.B.A., University of Alberta, LL.B., University of Alberta and a B.A., University of Western Canada. He is currently on the Board of Alberta Children's Hospital Foundation and was on the Board of Directors and Executive Committee of the Calgary Regional Health Authority. Brian was also a Founder a member of the Calgary Health Trust.

HEATHER RAE JOHNSON

Ms. Johnson has a law degree from Dalhousie University and practiced law for several years before becoming a consultant for the not-for-profit sector. She is the mother of four and President of the Board of the Calgary Waldorf School.

AMAL UMAR

Ms. Umar has experience as a community programmer and facilitator, and has developed, planned, and implemented several programs for immigrant women. For the past 27 years, she has been working on equity/human rights issues. Ms. Umar holds a masters degree in political science and has participated in local, provincial and national boards and councils. She was the recipient of a few community awards including the YWCA Women of Distinction award for community work. Amal is currently a member of the Dignity Foundation and works as a Social Development officer with the Department of Canadian Heritage.

G. ROSS RAMSEY

Following completion of an Honours B.A. in Sociology at Loyola College in Montreal and a Masters of Social Work degree at Dalhousie University specializing in social policy and community development, Mr. Ramsey began his career in the public sector. In 1985, he became the founding President and a Director of a family foundation in Vancouver. In 1989, he co-founded Optima Humanus Inc., a consulting firm specializing in the promotion of health, safety and performance of organizations and their employees. He served on Vancouver Foundation's Youth Committee for six year and is the Chair of the Community Foundations of Canada. Ross provided special assistance and expertise in the initial design of the consultation process and in clarifying the value-adds of community foundations across Canada.

APPENDIX C

Workshop Agenda

- 8:30 - 8:45 a.m. REGISTRATION and COFFEE
- 9:00 - 9:30 a.m. Introduction
- 9:30 - 10:25 Small group work session 1: three tasks to facilitate
round of introductions: introduce yourself and your affiliation with TCF, ask others to introduce themselves
“our best work” exercise: participants to answer the following questions:
1. Describe your best work.
2. What makes your best work possible?
3. What constrains you from doing your best work?
Participants share the main points of their best work with other members of the group
Discuss how they accomplished their best work and how it contributes to building stronger communities.
 - Ask that they post the sheets using masking tape on the flip chart under the title “Our Best Work”
 - have post-it notes ready to hand out, five to each participant
 - ask that participants move on the second question:
“what most challenges or constrains you in doing your ‘best work’?”
 - use one post-in note for each three to five of your top challenges or constraints
 - have participants order them by priority
 - Probe **“what would be your organization’s biggest constraint if money were not an issue?”**
 - ask the group to share their top two or three challenges or constraints, then ask everyone to put all their post-it notes on the flip chart. Ask for two volunteers to group related points together. Two volunteers should then assign “names” or titles to each grouping of challenges or constraints and write these beside the post-it notes. This should also allow the group to get a sense of the types of concerns and how many others are feeling the same challenges or constraints.
- 10:25 - 10:50 COFFEE (invite participants to look around the room at other group’s results)
- 10:40 - 11:45 small group second session: two tasks
brainstorm cross-sectoral and/or longer-term joint initiatives or projects address these opportunities and issues evaluate brainstormed suggestions using the following approach and questions
 - using the prepared sheets, participants can write down their top two or three alternatives for each of the evaluation criteria;
 - in groups of three, participants compare alternatives and list four which meet multiple criteria
 - each group shares the list with the larger group discuss alternatives in more detail
Ask the following:
 - which of these ideas address the greatest need?
 - which could have the greatest impact (geographically, across clients, across organizations in different sectors, within the same sector)?
 - which are most likely to strengthen the community the most?
 - which ones best address opportunities and challenge identified earlier today?
 - which are most interesting and why?
- 11:45 Closing remarks and invite people to enjoy lunch and do on final exercise
- 12:00 noon Lunch and “dotmocracy” — everyone will be invited to review all the work up on the walls and “vote” in a “dotmocracy” for their favorite ideas — each will get five (5) votes (coloured dots) to place near ideas that excite them or merit further work.

APPENDIX D

Workshop results

“What makes our Best Work possible?”

- Collaboration /cooperation / partnerships between sectors and agencies [41]
- Volunteers [34]
- Funding [31]
- Commitment/dedication of volunteers and staff [27]
- Vision / commitment to vision / shared vision [21]
- Consumer involvement/ community participation/control [20]
- Staff / qualified staff / dedicated staff [13]
- Trust, reciprocity and relationship-building [8]
- Leadership (and leadership training) [8]
- Community Support [6]
- Flexibility/openness of organization/program [6]
- Donors [5]
- Caring/compassionate ethic [5]
- Connection to greater purpose/spirit [4]
- Creativity [4]
- Corporate Support [4]
- Risk-taking [4]
- Reputation in community [4]
- Understanding/respect for diversity [4]
- Communication between organizations [3]
- Funding from foundations [3]
- Strong active board members [3]
- Public awareness of the issues [3]
- Energy and enthusiasm [3]
- Ability to address needs [3]
- Community/neighbourhood-based service [3]
- Identification/assessment of community needs [2]
- Being community-based (not agency or issue-based [2]
- A safe environment [2]
- Using a community development approach [2]
- Faith [2]
- Welcoming environment [2]
- Professional expertise [2]
- Focus on asset development/capacity building [2]
- Dynamics of various committees [2]
- School curriculum [2]
- Inclusiveness/acceptance [2]

Constraints and Challenges limiting our ability/capacity to do our best work

- Lack of Public Awareness / Recognition [54]
- Lack of Funds [40]¹
- Lack of Networking / Collaboration Between and Within Sectors [37]
- Lack of Time [32]
- Specific Funding Concerns [30]
- Societal Attitudes/Prejudices [25]
- Lack of Education /Skill Development [19]
- Lack of Volunteers [17]
- Role of Government [17]
- Lack of Staff or Administrative Support [15]
- Gaps in Service Delivery [15]
- Physical capital / Infrastructure [15]
- Fragmentation / Individualism [13]
- Systemic / Structural Problems [13]
- Uncertainty of Funding [13]
- Lack of Preventative/Holistic View [12]
- Political Issues [12]
- Lack of Vision [11]
- Disempowerment or Apathy [9]
- Reluctance to Change [9]
- Overloading and Burnout [7]
- Lack of Community Development Approach [6]
- Business Focus / Professionalization [6]
- Lack of Leadership [5]
- Lack of Citizen Participation / Consumer Involvement [5]
- Needs vs. Assets Focus [5]
- The Media [5]
- Technology Issues [4]
- Non-participation of Business Sector [3]
- Language/Cultural Issues [3]
- Stagnant Board [3]
- Lack of Long Term Planning [3]
- Geographic Issues [2]
- Organizational Uncertainty
- Nothing really, as the “good work” continues regardless, when people come together in connection to a common vision

¹ Participants were asked to assume that funding was the first problem, but it nonetheless appeared prominent.

APPENDIX E

“Top proposed initiatives, grouped by theme”

STRENGTHEN LEADERSHIP BY AND WITHIN THE SECTOR (63 VOTES)

(Focuses primarily on Pathway #1)

1. Develop a Calgary 'Vision' for and with all Calgarians (18)
2. Identify and support key tools and resources required by organizations (13)
3. Develop a body to create an holistic vision for our city. (10)
4. Help to strengthen new collaborative forms of leadership in the sector (7)
5. Make a clear commitment to action on the major issues discussed at these workshops. We have talked about many of these ideas with other funders and community groups during the past five years. (5)
6. Balance the focus on community assets with attention to needs. (4)
7. Examine and consider government's role in building our society. (3)

IMPROVE FUNDING & OTHER RESOURCE SUPPORT (58 VOTES)

(Focuses primarily on Pathway #5)

1. Place much greater emphasis on long-term stable funding (16)
2. Work for more tax incentives to build support for the not-for profit sector (16)
3. Promote tax credits for volunteer hours and enhance volunteer recognition (15)
4. Build the continuum of funding available for infrastructure funding (4)
5. Encourage the pooling of fundraising capacities and efforts (2)
6. Create a central database of funders: who funds what (2)

DEVELOP AN ADVOCACY ORGANIZATION FOR THE SECTOR, PLUS WORK ON IMPROVED COMMUNICATION ABOUT AND PUBLIC AWARENESS OF THE SECTOR (53 VOTES)

(Focuses primarily on Pathways #8)

Advocacy for the sector (37 votes)

1. Develop a Chamber of Charities to help build collaboration within the sector The Chamber must be more than a social planning council, for it must include a broad concern for quality of life and civic engagement (22)
2. Develop coordinated responses from the charitable sector to government action that impacts on the charitable sector and on the realm of civil society. (10)
3. Help the third sector take its rightful place in the community. (1)
4. Encourage more public education regarding the role of our sector (2)

Improved communication by and public awareness of the sector (16 votes)

1. Improve media understanding of and relations with charitable sector (8 votes)
2. Celebrate our successes (2 votes)
3. Educate business as to the contribution and needs of not-for-profits
4. Redefine and validate the importance of 'community' (1 vote)

FACILITATE VALUE CLARIFICATION AND CULTURAL CHANGES (46 VOTES)

(Focuses primarily on Pathways 3 and 9)

1. Develop a deeper city-wide sense of and skills for social responsibility and civic engagement (15)
2. Promote commitment to greater simplicity of life (6)
3. Enfranchise the disenfranchised; (6)
4. Continue to focus on “unlearning” racism and sexism (5)
5. Help to remove stigma associated with approaching not-for-profit organizations for services and personal support (4)
6. Eliminate systemic discrimination (4 votes)
7. Assist in changing our approach to power, domination and fulfillment (2 votes)

WITH A FOCUS ON NEIGHBORHOODS AND FAMILIES, ENCOURAGE CITIZEN ENGAGEMENT AND COMMUNITY BUILDING (38 VOTES)

(Focuses primarily on Pathways 3 and 7)

1. Build greater community engagement (12)
2. Create new mechanisms for involving people in the community (7)
3. Use community associations more extensively (6)
4. Encourage strong linkage between schools, not-for-profit organizations, community groups and local residents. (6)
5. Focus on prevention and on the importance of learning about community in our schools. (4)

INCREASED SHARING OF INFORMATION, RESOURCES AND ORGANIZATIONAL SKILL DEVELOPMENT (33 VOTES)

(Focuses primarily on Pathways 2 and 5)

1. Establish a Research Institute to track major issues (8)
2. Establish a non-governmental information centre that is focused on the local community (6)
3. Centralize training around some very basic functions common to almost all not-for-profits (6)
4. Work broadly at building collaborative partnerships (4)
5. Create a database of community-building expertise (4)
6. Create a central database of funders: who funds what (2)

MORE COLLABORATION & PARTNERSHIPS AROUND PROGRAM (19 VOTES)

(Focuses primarily on Pathway 2)

1. Develop a co-ordinated system for brokering supplies, partnerships, volunteers (5)
2. Provide opportunities for learning how to work together (17)

CHANGE THE WAY AGENCIES WORK (18 VOTES)

(Focuses primarily on Pathways 2 and 7)

1. Encourage more co-location or programs and agencies (6)
2. Establish more ‘servant’ institutions that are designed with a community and consumer orientation (4)

ADOPT A SPECIFIC PROJECT FOCUS — AS IDENTIFIED BELOW

(The projects focus respectively on Pathways 7, 6, 9, none, 9 and 1)

1. Encourage the development of community health centres (14)
2. Focus on building youth involvement (11)
3. Ensure we have low cost housing in every neighbourhood (7 votes)
4. Strongly address poverty issues—and the need for a social safety network
5. TCF to develop its skills as a facilitator, mobilizer, and resource centre

APPENDIX F

Workshop Participants

The following is a list of local not-for-profit organizations that, through the corresponding representatives (also listed), offered input in one of the three Building Community workshops.

A.C.T.S.S.	Colin Penman
Accessible Housing Society	Dianne Nickel
Active Parenting	Al Reynar
Alberta Ecotrust Foundation	Rose Bene
Alberta Theatre Projects	Michael Dobbin
Alexandra Health Clinic	Ary Vreeken
Alternative Cancer Research Foundation	Jane Stewart
Alzheimer Society	Barbara Biggs
Arctic Institute of North America	Michael Robinson
Arthritis Society	Neil Williams
Aspen Family Services	Tom Berthelotte
Bethany Care Society	Marci Rubinoff
Boys and Girls Clubs of Calgary	Cheryl Doherty
Brain Injury Rehabilitation Centre	Gerrit Groeneweg
Burns Memorial Fund	Pamela Burke
C.A.O.C.	Greg Matwichuk
C.N.I.B.	Cathy McFee
Calgary Association of Self Help	Marion McGrath
Calgary Between Friends Club	Chris Trollope
Calgary Birth Control Association	Paulette Stroo
Calgary Boys Choir	Lynn McDonald
Calgary Bridge Foundation	Harry Yee
Calgary Centre for Non-Profit Management	Sue McIntyre
Calgary Centre for Performing Arts	Colin Jackson
Calgary Chinese Community Services Association	Sumyu Hon
Calgary Community Living Society	Sjaune Zabel
Calgary Counselling Centre	Marla McGregor
Calgary Drop-in Centre	Dermot Baldwin
Calgary Family Connections Society	Susan Himann
Calgary Family Services	Linda Tillman
Calgary Health Trust	Tamara Cohos
Calgary Immigrant Aid Society	Becky Mansour
Calgary Immigrant Women's Association	Shokoofch Moussavi
Calgary International Children's Festival	Joanne James
Calgary Learning Centre	Anne Price
Calgary Mennonite Centre for Newcomers	Carol Simpson
Calgary Native Women's Shelter	Naida Maher
Calgary Philharmonic Society	Kathleen Specht
Calgary Police Service	Rick Haddon
Calgary Regional Arts Foundation	Kathryn Hartley
Calgary Science Centre	Jodi McNabb
Calgary Vietnamese Canadian Association	Peter Phung

Calgary Waldorf School	Dinah Clark
Calgary Young People's Theatre	Valerie White
Camp Chestermere	Frank Little
Camp Horizon	Diana Gallivan
Canadian Heritage	Amal Umar
Canadian Mental Health	Trish Cameron
Cathedral	Robert Pyuu
Catholic Family Services	Greg Campbell
Child Find Alberta	Margie Niven
Child Friendly Calgary	Penny Hume and Jarett Lalonde
Children's Cottage	Patty Kilgallon
CHOOSE: The Fellowship	Maggie Hatlen
Churchill Park Family Care Society	Noreen Murphy
City of Calgary Community and Social Development	Randy Greene
Clean Calgary Association	Joan Lewin
Connaught Community School	Lilijana Miletic
Council of Sikh Organizations	Cheronjit Sanghera
Court House Educational Society	Kathy Gregor
CUSO	Cheryl Goldsmith
Developmental Disabilities Resource Centre	John Donova and Cesar Cala
Discovery House	Jean Langdon
Easter Seal Ability Council	Theresa de Waal
Elizabeth Fry Society	JoAnne Clarke
Enviros Wilderness School	Jim King
Epilepsy Association of Calgary	Kathy Fyfe
Esther Honens International Piano Competition	Jayne Johnston
Family Program @ C.C.I.S.	Celia Osenton
Fresh Start	Carole Berthelotte
Galileo Centre — RVSD	Brenda Gladstone
Glenbow Museum	Bob Janes
Grace Foundation	Jocelyne S. Daw
Habitat for Humanity	Jack Dickson
Healthy Calgary	John Donova
Hillhurst Sunnyside Community Association	Mary Jane Amey and Tim Tyler
Historical Society of Alberta	Sheila Johnston
Hospice Calgary	Lou Winthers
Huntington Hills Community Association	Randy Thornhill
Integrated Post Secondary Education Society of Alberta	Stan Nykiel
Junior Achievement	Dr. Mike Bregazzi
Junior League of Calgary	Stacy Collyer
Kerby Centre	Pat Allen
Learning Disabilities Association of Alberta	Sheila Kerr
M.S. Society	Francine Abma-Vink
Max Bell Foundation	Allan Northrott
Meals on Wheels	Eileen Beneteau
Nebula Rehabilitation Society	Terri Konoplenko
Nickle Arts Museum	Brenda Ann Marks
North of McKnight Community Resource Centre	Laura Brankovich
Ogden House Seniors Club	Anthony Storcer

Parents Support Association
Parks Foundation
Partners: Community Family Resource Network
Peer Support Services for Abused Women
Planned Parenthood Alberta
Project Ploughshares
Promotion and Prevention Services, Community
Health Resources — CHRA
Quest Theatre
Renfrew Educational Service
Schizophrenia Society of Alberta
Sir Winston Churchill High School
Southern Alberta Brain Injury Society
Stampede Foundation
STARS Air Ambulance
Suicide Information and Education Centre
Sustainable Calgary
Theatre Calgary
Tom Baines Senior High
United Way
Variety Club of Southern Alberta
Viscount Bennet Centre
Volunteer Centre of Calgary
VRRRI
Wise Women's Society of Alberta
Women's Centre of Calgary
YWCA
University of Calgary

Elaine McMurray
Tracy Tarues
Joyce Maier-Rasmussen
Rae-ann Wood-Schatz
Melanie Anderson
Rodger Mellow

Sharon Anderson
Yolanda Lavallee
Jan Mason
Beth Walker
Howard Robertson
Janet Magrum
Nancy Peters
Lina Powell
Gerry Harrington
Noel Keough
James Brewer
Lyn Moehling
Ruth Ramsden-Wood
Kim Warburton
Mary Willis
Karin Hoerning
Karen Caughey
Callie Roang and Carole Robitaille
Susan Gillies
Mario Siciliano
Patty Brennen

APPENDIX G

Private Foundation Participants

The following is a list of local private foundations, who offered input during a special meeting focusing on the Community Consultation.

Nickle Family Foundation

Devonian Foundation

The Nat Christie Foundation

Carthy Foundation

Daryl K. Seaman Foundation Fund (TCF)

Pirie Foundation

Thomas J. Ranaghan Foundation

Harry B. Cohen Foundation of Calgary

Max Bell Foundation

Calgary Flames Foundation

Scott Daniels Seaman Foundation Fund (TCF)

Rotary Club of Calgary

United Way of Calgary and Area

APPENDIX H

A very brief history of civil society

There is considerable debate about when the idea of civil society emerged. Most agree that the term arose first out of the Scottish Enlightenment. It was debated and theorized by the likes of John Locke, David Hume, Frederick Hegel, Karl Marx, Immanuel Kant. Perhaps the most widely cited real world observation of the idea of civil society is Alexis de Tocqueville's *Democracy in America*. In it he showed that the strength and effectiveness of early 19th century American democracy was intimately linked with the strength of its civil society. In contrast to the pluralism evident in France, de Tocqueville argued that the uniformity of people's morality and worldview in the United States strongly reinforced bonds of cohesion between otherwise 'free' individuals, thereby strengthening the civil society. Current scholars wish to move beyond de Tocqueville's reliance on a purely western conception of civil society, arguing that in today's world we must conceive of it more broadly and universally.

"This (civic) culture must be capable of fostering a meaning of democracy which features '... self government, free communication as between equals, unimpeded access to the common store of knowledge, protection against arbitrary external controls and a sense of individual moral responsibility for behaviour that effect the whole community'.

— Lewis Mumford, as quoted in Miller (1996:15)

Many have echoed Tocqueville's argument that a strong civil society upholds a healthy democracy. Robert Putnam, in his now famous study *Civic Traditions in Modern Italy* (1993) was able to demonstrate this connection with strong empirical evidence. Others have argued that a strong civil society is the basis of, or a necessary complement to, a strong economy.

"Excellence in management will be achieved through an organizational culture of civility routinely utilizing the mode of community. Such organizations will be so dramatically successful, that is, cost-effective, that their sister institutions — no matter how initially threatened — will flock to discover their secret and imitate them."

— M. Scott Peck, as quoted in Schaffer and Amundsen (1993: 128)

For further general reading on civil society, refer to Bethke-Elshstein (1997) and Seligman (1992). For some critiques of the idea of civil society, refer to Waites (1996) and Beem (1996). Reid (1995) and Rifkin (1995) talk about civil society's connection to a strong economy while Putnam (1995) demonstrates its strong relation to governmental effectiveness.

APPENDIX I

Feedback on the Four Priority Initiatives From Community Development Specialists

MAJOR THEMES

GENERAL COMMENTS

Participants highlighted the following issues during discussions about community building in general:

- Collaboration is needed, both cross-sectorally and particularly between all funders (funders must get away from their current isolation mode). Competitive fundraising between groups makes collaboration difficult.
- There is some need for a community-wide vision, though this task could be overwhelming and unrealistic.
- The economic health of neighborhoods must be a focus
- Citizen involvement needs to be increased by enhancing the skills of civic engagement and by fostering people's confidence and a belief that they can make a difference.
- Education is critical to community building, particularly enhancing skills and expertise.
- Other issues:
 - Focus on prevention in addition to traditional reactive problem-solving
 - Raise public awareness of the sector and issues within it
 - Turn toward social entrepreneurship by building upon the city's existing ethic of entrepreneurship
 - View affordable housing as a municipal responsibility

The bulk of the discussion focused on the four-pronged initiative proposed by TCF:

INITIATIVE #1 ("OUR MILLENNIUM")

- Overall, there was much support for the initiative
- Need to increase awareness and consciousness (especially of informal leaders and "small" work in the community)
- Is "fluffy" (i.e. an opportunity to be creative and fun)
- Need to include people, not just ideas
- Opportunity for different levels of community to be recognized
- Some concern over cost
- Need to encourage involvement of the disenfranchised more
- How do we emphasize "social entrepreneurship"?

INITIATIVE #2 (NEIGHBOURHOOD-BASED GRANTING)

- Overall, the initiative was generally supported, though participants interpreted this approach to be technical assistance rather than neighbourhood development
- Saw a great need for technical assistance in organizations, especially computer skills and accounting assistance
- This can especially help small, fledgling groups, who have some of the best ideas, but the poorest skill-base
- Need to retain the “human touch” more than emphasizing technology
- Initiatives #2 and #3 seem to work well together
- Few funders currently operate at the neighborhood level
- Citizens are not engaged enough - they feel distant and disempowered due to the way non-profits currently operate
- Unclear whether initiative is neighbourhood-based or city-wide

INITIATIVE #3 (WEB-BASED CENTRALIZED INFORMATION SOURCE)

- Overall, participants were very supportive of this initiative
- Some see this as the most critical priority of the four
- Would help corporate sector, who are swamped with funding requests
- Would help organizations decrease fundraising time
- Requires an advertising campaign
- Some concern over cost of registration/use
- Seems like subset of the Initiative #2, and should be seen as only part of a larger technical assistance piece
- Concern over limiting this to project-based funding only

FEEDBACK ON CIVIC LOAN FUND

- Overall, there is disagreement and some discomfort with this initiative
- Can be a useful tool to smooth out cash flows, helping smaller organizations with “bumpy” periods and providing valuable emergency funds
- Concerns over partnering with banks/credit unions - unclear how this ties into community building; peer-review of applications rather than banker-review suggested
- Some questioned what the point of lending is
- Organizations should not rely on this source of funding - some felt it is unsustainable (while another felt it would enhance organizational self-sufficiency); should only be for certain types of activities
- There are Revenue Canada issues that need to be addressed
- Needs to be flexible
- Must tie in with broader goal of community-building

APPENDIX J

The Major Initiatives Screening Process

Approved at TCF's Board Workshop Feb 1998

PURPOSE: TO MAXIMIZE BOARD WISDOM AND STAFF EXPERTISE

PROCESS:

1. Staff to identify and investigate possible large projects, building on internal and external research whenever possible.
2. Staff to screen alternatives through "Filters" agreed upon in advance by the Board of TCF. (The initial list of filters is provided below.)
3. Staff to prepare a list of pros and cons relative to each proposal, and to clarify how the cons will be mitigated/dealt with before, during and following the project.
4. Executive Director to recommend a particular project or projects to the Executive Committee and then to the Board as a whole.
5. Board to review the proposal, assessing the following matters:
 - were the agreed upon filters respected?
 - is the analysis of pros and cons complete?
 - Are the "mitigating strategies" acceptable?
 - is the (draft) budget acceptable
6. Board will then approve with or without changes, and subject to appropriate financing, or the proposal will be rejected or delayed.

FILTER, SCREEN, PRINCIPLES TO BE USED WHEN EVALUATING PROPOSALS

- a) Promotes awareness and asset development
- b) Engages donors
- c) Maximizes use of Board and staff knowledge, networks, time and skills
- d) Builds upon and is supported by research results
- e) Uses the Granting Mechanism (i.e.: is itself a charitable project & is not simply administrative activity)
- f) "Thematic" ... cuts across silos/sectors
- g) Practical, has some built in flexibility, is adaptable to changes in our city
- h) Consistent with the value adds of TCF as a Community Foundation, and is consistent with our values, mission, goals and practices
- i) Asset based rather than needs based
- j) Scores appropriately when assessed using some quantification approach designed to differentiate between alternative proposals (this "approach" has not yet been developed).

APPENDIX K

Plan for a Civic Investment Loan Assistance Fund for registered not-for-profit organizations

Note: In addition to the Major Initiative discussed in the main body of this Report, The Calgary Foundation is also exploring creation a Loan Fund. An anonymous donor has offered \$150,000 towards the Fund, conditional upon the raising of a further \$150,000 by TCF from other sources.

The purpose of this innovative fund is to improve the financial stability of registered charitable organizations through small, short-term loans and small loan guarantees. This idea was not raised at the workshops, but it speaks to the need for creative new ways to support registered charities in a time of dwindling resources. The Loan Fund will enable TCF to leverage its capital assets by assisting not-for-profits in a non-traditional, non-grant-making way. This fund supports the building of community by recycling limited funds, adding resources to the community not previously available, and strengthening the capacity of not-for-profit organizations working in the community.

Making a loan rather than a grant will also change the implicit message the Foundation sends to those who receive support. There will be a clear, written expectation that the recipient organization will remain viable and financially sound so that the loan can be repaid. It is hoped this will encourage greater attention to careful financial planning and sound financial management. Furthermore, as stated in the Program Related Investment Primer, 'Bringing an investment orientation to the business of philanthropy widens and deepens a foundation's ability to contribute to its community.'

Discussions are underway with Revenue Canada to ensure that this type of activity complies with Canadian guidelines

DETAILS

- An anonymous donor has agreed to provide \$150,000 towards the Civic Investment Loan Fund, conditional upon the Foundation's raising matching funds from corporations, private donors and other funders.
- Options for administering the loans have not yet been clarified, but they include assigning the primary responsibility to Foundation staff and a bank, credit union, or some other arm's length organization.
- Initially, TCF will only consider simple, low-risk loans. These steps will be taken prior to the release of any loan:
 1. Receipt of a loan application or identification by TCF staff of loan-making opportunity
 2. Initial evaluation of the opportunity and risks, by TCF or bank staff

3. Initial determination of the appropriate repayment terms
4. Review of the proposed loan by the TCF Loans Advisory Committee
5. Review and approval of the transaction by the Executive Director or the Executive Committee
6. Final negotiation with the recipient regarding terms and conditions
7. Transaction documentation and closing
8. Ongoing monitoring during term of the loan, until repayment in full has been received
9. Quarterly or semi-annual assessment of the Loan Program, with a focus on both recovery rates and impact on the recipient organization

RATIONALE

Community foundations in the United States are using their capital assets in innovative ways to meet a diverse set of community-building goals. Through program-related investments (PRIs), loan funds, loan guarantees, and a range of other mechanisms, they are supporting projects in fields ranging from community revitalization to the arts. Some foundations invest their own assets in these ventures, while others raise funds specifically to undertake larger social investment projects. Some are supporting massive housing and economic development projects; others are choosing to focus on very small-scale ventures. Many community foundations are using social investment projects as a fund development strategy. All are learning that funders can make an impact in program-related areas by following other routes apart from traditional grantmaking. Almost 80 per cent of community foundations surveyed for a recent U.S. study reported they were involved in “social investing,” a form of support for not-for-profits pioneered by The Ford Foundation.

The arguments advanced in favour of such program-related investments are that they :

- serve to leverage financial participation from traditional financial institutions and government sources that might not otherwise be forthcoming;
- serve as models for other public and private organizations interested in devoting some portion of their assets to social issues;
- expand a foundation’s contribution to the community by allowing participation in projects of a size and scale that would not be possible from the annual grants budget;
- attract donors to the foundation who are specifically interested in having their charitable funds recycled.

ILLUSTRATIVE CASE STUDIES

The Cleveland Foundation invested \$3.9 million in the Playhouse Square Complex. Its investment led to the revival of three area theatres and revitalized retail activity. The Foundation also moved its offices to the area.

Twenty-five years ago, the Indianapolis Foundation bought an \$85,000 building for a Senior Citizens' Centre. After selling the building for \$670,000, the Foundation purchased another building for the Centre at a cost of \$400,000. This saved the United Way approximately \$850,000 in rent over twenty-five years and produced a profit for the Foundation.

To address the needs of a larger number of students, the Santa Barbara Foundation established a loan/scholarship program. A Student Aid Committee makes loan decisions, and students repay 50 per cent of the loan amount. The Foundation has a 98 per cent repayment rate.

The Metropolitan Atlanta Community Foundation made a \$470,000 loan to a local theatre company to undertake much-needed renovations. The loan enabled the company to carry out all its repairs at once and to launch a fund drive that eventually paid off the loan.

The New York Community Trust has established a Loan Guarantee Program that helps not-for-profits obtain short-term financing from commercial banks and other lenders by guaranteeing loans for a maximum of \$50,000 up to three years. The Trust does not serve as a lender but as guarantor. In the event of default, the guarantee is made good with a grant.

The Minneapolis Foundation's Nonprofit Assistance Fund started out small, as an emergency source of short-term cash low loans for not-for-profits facing delays in government contracts. It has broadened its mission to improve the financial stability of not-for-profits through loans for capital acquisition, repair financing, working capital, earned income venture capital, and a variety of other purposes. In the first four years, the Fund lent \$3.8 million, relending the original base of \$265,000 more than ten times. This gives the Foundation an opportunity to practice what it preaches — creating its own financial stability through an alternative investment model.

OUR STRENGTH IS COMMUNITY

EXPLORATIONS ...



A MORE EXTENDED REVIEW *of*

KEY IDEAS

THE CONSULTATION PROCESS

and

THE EVALUATION OF POSSIBLE INITIATIVES

Authored by:

SAMUEL WM. AYLESWORTH, DEBORAH BARTLETT,

BRENDA L. NAYLOR, JAMES H. STAUCH

AND MONICA K. POHLMANN



VOLUME II
**OUR STRENGTH IS COMMUNITY
EXPLORATIONS ...**

A MORE EXTENDED REVIEW OF ISSUES AND PROCESS

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EXPLORATION OF KEY CONCEPTS

A SUMMARY OF THEORETICAL *and* RESEARCH FINDINGS

Key Concepts

As was noted in Volume I, The Calgary Foundation has consciously chosen to give priority to a number of key ideas:

- “collaborative philanthropic leadership”: “How” do foundations help to build community
- “civil society” and “social capital”: “Why” do we build community
- “asset-based development” and “building capacity,” as distinct from a focus on problems and community deficits: “What” is our focus?
- sector-wide and citywide partnerships and collaboration: “Who” are our partners within and beyond the not-for-profit sector?
- strategic identification of community building opportunities: “Where” are the priorities, and what are TCF’s role in meeting them?

Collaborative Philanthropic Leadership

“Collaborative philanthropic leadership” can be thought of as a leadership style focused on building civil society by taking an appropriate place within rather than apart from or above one’s community. This position recognizes the contributions that many others must and do make to building community. It is the “how” of community building.

Collaborative philanthropic leadership builds on the idea of safe, respectful conversation. It involves convening with others, initiating conversation and

sharing in the conversations initiated by others. It creates networks of trust and respect, and it focuses on building skills of collaboration and norms of reciprocity. It is non-hierarchical, non-adversarial, and broadly focused leadership that emphasizes process rather than short-term tactical outcomes. Successful collaborative leadership results in tangible, systemic, and sustainable change.

There are many ways to exercise such leadership. David Chrislip (1994, 1995), a prominent writer on the subject, refers to the role of the leader as “convenor, catalyst, facilitator and sustainer of collaboration.” He offers some simple suggestions for convening: be open, be inclusive, be constructive, and have good information without being expert-driven.

Leadership of community-wide visioning processes is an excellent example of how collaborative philanthropic leadership skills can be used. Such undertakings are intended to be deeply democratic. As Chrislip notes, even technically complex issues, such as environmental contamination, can engage all citizens if appropriate convening and facilitation strategies are employed. He writes:

Collaboration is more than simply sharing knowledge and information (communication) and more than a relationship that helps each party achieve its own goals (cooperation and coordination). The purpose of collaboration is to create a shared vision and joint strategies to address concerns that go beyond the purview of any particular party.¹

According to some authors, giving priority to a collaborative leadership style may greatly challenge the way foundations approach their work in the community. Organizations interested in enhancing community capacity and social capital must be willing to think about and act upon tasks such as —

¹ Chrislip, Collaborative Leadership, 1994, p.5.

- building internal and external skills for collaborative leadership;
- acting as a bridge or sinew between sectors and organizations;
- disseminating and facilitating knowledge flow in the community;
- understanding the difference between science-driven planning and more participatory approaches to community-building;
- encouraging localized, participatory decision-making;
- helping to create a community-wide vision;
- strengthening the social covenant to balance an emphasis on individual freedom and equality of opportunity with an equal emphasis on identifying common values and commitments;
- valuing racial and cultural diversity;
- shifting from an economic to a civil paradigm.

If the intent is to adopt a collaborative leadership role, then TCF will need to strengthen its convening and facilitation skills, actively participate in collaboration and partnering efforts, and take steps to feature and discuss local issues in forums, such as conferences and symposia, that generate respectful dialogue. Furthermore, as a granting organization, TCF will need to support grant applications that focus on building collaborative leadership skills throughout the city.

For a concise discussion of collaborative leadership, refer to Chrislip (1994, 1995). Community Foundations of Canada (1998), Ries (1997), Ramsey and Reynolds (1997), and Zehr (1996) talk about the unique ability of community foundations to assume this kind of leadership. Miller (1997), Potapchuk, Crocker and Schecter (1997), and Walsh (1997) each offer a set of principles to guide foundations in community building. Briggs (1997) refers specifically to foundations' roles in building social capital.

“Civil Society”

“Civil society” is an abstract concept rooted in western democratic scholarship, but many of its underpinning values and its practice are shared by societies around the globe and throughout history.

Because “civil society” is the “why” of community building, it is important to make clear what it means, why it is important, and how it can be nurtured. The notion of “civil society” serves to clarify the nature of the outcomes we seek and the values we hold. Clarity here helps us better develop and evaluate alternative community-building initiatives.

The term “civil society” has been defined in a number of ways. The following core elements, when taken together, serve as TCF’s description of the realm or domain called “civil society.”² This is the realm the Foundation wishes to support and enhance:

- The realm of demonstrated commitment to building a “public sphere” that is distinct from, but overlaps with, the realms of government and economic markets. (This sphere is strongly linked to but not identical with the not-for-profit sector.)
- The realm that values community-focused and citizenship-based action. (This refers not only to official citizenship and voting, but also to carrying out broader commitments to, and responsibilities for, one’s community and the broader society.)
- The realm of action that is motivated by a desire to support a greater or common good
- The realm of actions that express respect for shared democratic values — autonomy, liberty, and equality of opportunity, tolerance, fairness, the rule of law, choice, and non-coercion — recognizing that some of these values are given different emphasis and generate varying socially-valued behaviours in cultures around the globe

² Adapted from Miller (1997), and from Potapchuk, Crocker and Schecter (1997).



- The realm that encourages involvement in and a valuing of relationships and communications that are participatory, respectful, and cooperative and that respect and embrace diversity. (These relationships encompass those solely within one's cluster of associations, as well as those between one's own cluster of associations and the "rest of society.")
- The realm that values a conscious reliance upon and nurturing of social capital: reciprocity or mutual responsibility, trust, sense of community, and confidence and skills for participation in citizenship-related activities.

Many see building civil society simply as a call to strengthen the connection between government and citizens. Others, including the Foundation, envisage civil society much more broadly, as an autonomous sphere, a dense "fibrous" network of formal and informal values, commitments, involvement's and organizations which expresses a deeply held support for community. This sphere is distinct from and more central to our common life than is the role and work of government, even though the latter is of great value. Many believe that a strong commitment to civil society upholds a healthy democracy and is a precursor to a strong and effective system of government. It may also be the basis of a truly strong economy that benefits all citizens.

It is true that some authors argue the term "civil society" is merely the latest in a line of illusory buzzwords appealing to different ideologies for very different reasons. However, TCF believes it is a provocative and generative idea which points to the vast array of values, commitments, organizations, and forces that hold a community together and help to make it whole.

Each of the major domains (the personal, civil society, the state, and the corporate) supports and is intertwined with the others, except where the state intrudes to undermine civil society, as was the case

in the former Communist Bloc. Until recently, though, Western society has underestimated the importance of the civil domain and has failed to adequately support and nurture it and the values it represents. The Foundation believes that a renewed focus on civil society will benefit the community as a whole and the entire not-for-profit sector as we all work together at building community. This focus on civil society clarifies the Foundation's commitment to community and to the emergence of community. The not-for-profit sector is of immense value precisely because it helps all of us to share in the definition and building of community.

For a brief history of the idea of "civil society," see Appendix H in Volume I.

Social Capital

"Social capital" is a derivative term which helps to further define the term "civil society." Social capital has been described as the "glue" or the "fuel" of a civil society. It refers to key values and experiences that most take for granted: trust reciprocity, mutual responsibility, and a sense of care for and support from others. All these enable us to interact collectively to address common issues. As the Trillium Foundation points out, social capital is one of our greatest collective resources. Thus, it follows that developing projects that directly increase social capital can build society as a whole.

Pollster Angus Reid believes that Canada has a "competitive advantage" in the realm of social capital. He calls on Canadians to recognize and build on their latent social capital assets; this, in turn, will lend support to development of a stronger, more sustainable economy. "The most important challenge facing Canada's leaders," Reid claims, "is to foster a climate of sharing, mutual trust and civility. In the rush to set our economic affairs in order, let's not forget the fundamental values that have kept us together in the past and will help us secure the future."³

³ Angus Reid, *Shakedown* (1995, p.278)

The idea of citizenship is central to social capital. Citizenship incorporates two elements: confidence when playing a part in public life and commitment to do so, and skills relating to involvement in the public sphere, or “public-life” skills. Confidence and commitment rest upon a sense of both personal and collective power (or “agency”), a sense of realistic hope for change, and appropriate persistence. “Public-life” skills include the abilities to organize, to engage in persuasive argument and debate, and to manage group and individual work. The literature identifies sharp differences in the level of social capital within communities. To rebuild social capital, it states, we must actively support voluntarism, civic engagement, collaboration, and partnerships.

It is important to note that some respected writers on the subject maintain that social capital — and, thus, the strength of civil society — is in decline. Robert Putnam believes this decline began in the 1950s. Francis Fukuyama agrees both mutual trust between citizens and trust in government has declined sharply. Angus Reid echoes this observation, pointing to a decline of trust, civility, and fairness in Canada. Others challenge these beliefs, pointing out that many organizations and individuals are creating new forms of social capital and, in doing so, influencing all levels of civic life.

The Foundation believes the growth of community foundations is one sign of the high value placed upon social capital and civil society in our culture.

For further reading on social capital, Putnam (1995) is a good place to start. Reid (1995) offers a uniquely Canadian perspective. Seligman (1992) reviews the history and limitations of this concept. Fukuyama (1998) and Briggs (1997) offer more recent discussions and an in-depth analysis.

Building Community Capacity

If we agree that building civil society is a worthy vision for the work ahead, and if we agree that approaching this task in a collaborative way is essential, then what are we to focus on as we move forward? The terms “asset-based development” and “building community capacity” both point to the essentially positive process that is central to all serious efforts to build community. Building community capacity centres on mobilizing the commitment, resources, and skills that enable groups of individuals and groups of organizations to work together to improve public space and further the common good, whether this is at the individual, household, organizational, or community level. The actual effort required is unique to every situation.

The Rockefeller Foundation offers the following definition of building community:

“...continuous, self-renewing efforts by residents and professionals to engage in collective action, aimed at problem solving and enrichment, that creates new or strengthened social networks, new capacities for group action and support, and new standards and expectations for life in the community.” [source unknown.]

To be most effective, building community capacity must —

- focus on assets and strengths rather than on problems and deficits;
- build upon clearly identified innate or existing skills, resources and commitment;
- link the simultaneous development of skills, resources, and commitment, rather than attempt to develop each in isolation from the others.



There are a number of ways to translate this capacity-building theory into action. Organizational development activities and information sharing can link existing skills, resources, and commitment. Looking at a community's assets instead of its needs promotes actions that are holistic and preventative rather than solely reactive. Building community capacity can be achieved through projects that focus on children and youth and by projects that focus on community and neighbourhood development

To learn more about building community capacity, refer to Walsh (1997) and Lappe and duBois (1997), who offer thorough definitions. Solo (1997) draws a clear connection between civil society and community capacity building. Potapchuk, Crocker, and Schecter (1997) have developed a "ladder of community building" based on their analysis of social capital. Their work has been used heavily for the above discussion.

Challenges to Strengthening Civil Society

It is clear that building community is much more difficult than simply speaking about the vision and the process. A number of forces conspire to make building community and strengthening civil society a major challenge. Any initiatives undertaken or supported by the Foundation must recognize and plan to creatively address these challenges.

Those American and Canadian observers who believe we are living in an increasingly "uncivil" society point to the rise of such measures of incivility as homelessness, child poverty, job insecurity, absence of trust, and voter apathy at the national level. Indeed, our society seems increasingly individualistic, fragmented, and self-absorbed. Angus Reid, for one, laments the waning of concern for the public interest in favour of rampant self-interest. Unfortunately, determining whether or not incivility is on the rise is still a matter of debate and perception, as there is little agreement on how to gauge this construct.

While some of these trends are currently affecting Calgary, there are also large numbers of dedicated volunteers and staff in the not-for-profit sector and throughout the city who are willing and able to work long and hard, creatively and collaboratively, on broader issues.

Most writers on the subject agree that individualism is the principal challenge to civil society, for it threatens social cohesion and regards many community-focused values as irrational, among them trust, neighbourliness, giving of self and resources, acting for the greater good, etc. Others argue that our ways of organizing work and the economy also mitigate against the building of community. An increasing number of people are obliged to work longer hours just to provide the basics for themselves and their families, let alone to improve their standards of living. Consequently, there is often little time and energy left to devote to activities that enhance civil society. As David Bonior wrote in 1996, "...working people in America have been downsized and dismissed by a new corporate ideology that has devalued the dignity of work, the security of the family and the fabric of our community." ⁴

Some argue strongly that government and the corporate sector suffer from critical ailments that directly undermine civility and civic engagement. Politicians, professional lobbyists, and especially the media are often criticized for their failure to be constructive. "The growing strength of the economic paradigm which weds market and government power squeezes civil society from two sides," says Paul Miller. "On one side stands the power of a professionalized political clerisy and journalistic literati, which highlight controversy and downplay hopeful solutions. On the other side are market values based in personal self-interest, which undermine consensus for the common good." ⁵

Others feel that the failure to see diversity as a positive part of civil society stems from dated notions of community. If this is the case, we must review

⁴ David Bonior, "An Economics of Civil Society" (1996)

⁵ Paul Miller, "Strengthening Civil Society" (1997, p. 16)

our approach to diversity. Community is more than the coming together of people who are similar. Community is also about valuing differences and building trust and reciprocity across race, culture, income, ability, and other divides.

“Stories of tight communal bonds in neighbourhoods of every colour populate our history books. However, that localized capital cannot be substituted for the generalized social capital that needs to connect every race, every class, every culture and every ethnicity.”

Further Challenges, relating to links and differences between civil society and the not for profit sector

... as ... [market] values come to shape the [not-for-profit sector] ... there is a loss of commitment to the [deeper] principles of reciprocity, obligation and community solidarity ... No longer to citizens need to organize on their own behalf and engage in various forms of opposition, including social movements, rallies and other forms of dissent. Instead the NGO sector legitimized as a[n] ... organized arena of public debate with institutional and financial support from the donor community, has come to speak on behalf of the citizenry
Shelley Feldman, “NGOs and Civil Society”

A number of challenges relating to building community arise because of faulty thinking about civil society and its links with and differences from the not-for-profit sector. Three prevalent myths or misconceptions have been identified. To design effective initiatives that truly build community, these myths must be kept in mind.

First, many political figures and popular writers have assumed that the not-for-profit sector can replace government activity in a number of key areas, simply by pressing people to become volunteers and to act with greater charity. Unfortunately, empirical evidence shows the opposite. Hope and vision move voluntary work. It is diminished when the work is presented simply as a last resort imposed by external pressures. Further, the deeper dynamic of civil society is undermined when the not-for-profit sector is seen as the only sector bearing responsibility for civil society.

The second myth is that civil society can be built solely through reliance on market forces relating to competition and informed co-operation. This myth suggests that the not-for-profit sector will be stronger — and civil society more likely — if it simply takes on the assumptions and skills of the corporate domain. Jeremy Rifkin argues that this is a dangerous myth, because the private sector exists primarily to build financial capital, not social capital. The values and paradigms that serve society well as it builds financial capital are not necessarily the same as those that help to build civil society.

To illustrate, striving to operate efficiently and to do more with less money can be a laudable goal. Yet many authors argue that the more voluntary organizations view themselves simply as a different kind of “business” (and they are being pressed to do so), the less likely they are to focus on nurturing social capital and civil society. This is because fostering citizen participation in decision-making, an activity that nurtures civil society by encouraging civic engagement, requires a great deal of time and resources. Although building social capital and the cohesion and quality of community life may, indeed, be an inefficient exercise, perhaps such inefficiency is of great value in this instance.

⁶ William Potapchuk and Christopher Gates, “Making Citizen Democracy Work” (1997: 110)

⁷ Shelley Feldman, “NGOs and Civil Society,” (1997:50,59)



The third myth is that not-for-profit organizations are the primary, if not the only, champions of civil society. They alone — supported by donations from the public — have the primary responsibility to ensure that all citizens enjoy a wide range of basic services, such as basic health care, housing and education, childcare, emergency food requirements, crisis services, environmental clean-up, and more. In contrast, The Calgary Foundation would argue that the concept of civil society extends far beyond the provision of basic services, and that providing those basic services is the responsibility of all domains — the individual, the state, not-for-profits, and the corporate sector. The assumptions held throughout our community regarding this myth in particular must be widely debated and clarified. The quest for a truly civil society must be shared by all segments of our culture.

To read more about the challenges to fostering civil society see Miller (1997). Bethke Elshtain (1997) writes about individualism, Bonior (1996) and Saul (1994) describe corporatization and corporatism respectively, and Briggs (1997), Potapchuk and Gates (1997) and Beem (1996) explore the question of pluralism.

Chambræ (1997), Phillips (1995), and Heginbotham (1990) provide some sobering observations regarding voluntarism and the limited ability of the not-for-profit sector to cope with government offloading. Fernando and Heston (1997), Feldman (1997), and Whaites (1996) also speak of the blurred relationship between civil society and the not-for profit sector

EXPLORATION *of the* WORKSHOP PROCESS *and* FINDINGS

Exploring Possible Initiatives

When representatives of The Calgary Foundation met with a number of private foundations in June of 1998 to discuss a range of possible initiatives, the group expressed a strong interest in developing an information centre to facilitate information-gathering about the not-for-profit sector and community development. In addition, they wanted to efficiently build links between projects, funders and donors. This was the first possible initiative identified.

A list of exemplary initiatives undertaken in other cities was then developed. This list served as an important springboard for the group's thinking, since the initiatives are a wonderful illustration of the widespread commitment to community across Canada and the United States. They challenge the Foundation and all Calgarians to think carefully about larger, creative ways to build community together. The initiatives were deliberately selected to illustrate a wide range of possibilities:

- A New Social Contract: Boston Foundation
- Education, Arts, Identity and Community: Ford Foundation
- Building Civic Engagement: Toronto Community Foundation
- Community Visioning and Transformation: Mayfair Community Foundation
- Funding Grassroots Change: Minnesota Foundations
- Youth Philanthropy: Michigan Community Foundations

- Building Neighborhoods and Social Capital: Pew Charitable Trust
- Children at Risk: Arizona Community Foundation
- Social Investing: Council on Foundations
- Asset-Based Investing: Ford Foundation

Following completion of the literature review, the meeting with the private foundations, and study of the exemplary initiatives, three workshops were held with 129 representatives from the not-for-profit sector.

Input from the Workshop Participants: The Top Ideas and Initiatives

The top ideas and initiatives generated by the workshop participants were gathered into two summaries. One of these lists the top ideas ranked according to the number of votes assigned to them by the participants, while the other clusters the ideas together into groups of similar or related possibilities and identifies the pathway which is the focus of each group of initiatives.

The following themes were used to group the 143 ideas and initiatives proposed in the workshops:

- Strengthen leadership by and within both the not-for-profit sector and the wider realm of civil society (63 votes)
- Improve funding and other resource support for the sector and for initiatives that focus on building community (58 votes)

- Develop an advocacy organization for the sector (a Chamber of Charities), plus work on improved communication about and public awareness of the sector (53 votes)
 - Facilitate values clarification and cultural changes (46 votes)
 - With a focus on neighbourhoods and families, encourage citizen engagement and community building (38 votes)
 - Encourage more collaboration and partnerships around programs (19 votes)
 - Change the way agencies work, in a variety of specific ways (18 votes)
 - Adopt one of a number of very specific projects recommended by one or more participants. (total of 39 votes for 6 different projects)
- an interest in developing new visions for the city as a whole;
 - a desire for more open discussion about the values that inform day-to-day decision; and
 - an interest in the intricacies of developing collaborative leadership across all sectors — not-for profits, communities, corporations, and governments.

It was clear to TCF that the workshop participants are all committed to building community in a way that encompasses but goes far beyond the not-for-profit sector. As expected, the participants expressed organization-based concerns throughout the workshop: funding concerns, the desire for greater collaboration and more efficient information-sharing, the importance of dollars for organizational development as a complement to program funding, and the growing need for specialized training to deal with change. Still, the discussion about these issues was presented in the context of serious concern for broader issues that speak of community and civil society. These included —

The group also expressed a strong interest in building civic engagement from the grassroots up, beginning at the neighbourhood level and within families. Community development was seen as an essential complement to organizational development, and community associations, schools, and other local groups were clearly regarded as colleagues, not as competitors. Although competition for dollars is certainly a fact of life for all groups, workshop participants were confident that widespread commitment to the greater good and to social cohesion would overcome the challenges posed by competition and fragmentation.



EXPLORATION *of the* TEN STRATEGIC PATHWAYS

PATHWAY #1 Visioning and new approaches to leadership

When building community, knowledge, engagement and skill development need to be the focus and the positive tone provided by visioning and collaborative leadership.

Perhaps more significant [than skill training] are the insights, determination, and human characteristics needed to cope with and embrace complexity and uncertainty in pursuit of a self-chosen vision, coupled to translating a vision into organizational goals... A starting point for this leadership requirement is self-awareness. Then come insights into how societies work and the translation of a morality of caring into appropriate civic institutions, power relationships, and divisions of labour. In short, the pressing issues relate to NGO identity and position in society. Knowledge and skills are derivative; they come later

- The City of Phoenix engaged in a massive collaborative visioning process that focused on the year 2015.
- The Mayfair Community Foundation in California's Silicon Valley spearheaded a community visioning process culminating in seventy-six community development projects strategically designed to transform the community in the direction of that vision.
- The Toronto Community Foundation has proactively invested in a vision effort — "Taking Toronto's Vital Signs" — that is aimed at defining and measuring the city's current and desired quality of life.
- The Calgary COMMUNITY NETWORKS group, inspired by the visionary community builder Milenko Matanovic, advocates a city vision that includes and encourages the city to openly adopt a community development philosophy.

Further, capacity building efforts, by definition, must involve nurturing local leadership identified within and by the community itself. This emphasis is illustrated in each of the following initiatives where leadership is emphasized:

- Community foundations involved with the Ford Foundation initiative played a local leadership and convening role that involved gathering advice from diverse perspectives, learning when and how to "stay neutral," and when to move beyond talk into action.

As Chrislip (1994) has noted, the kind of leadership required to ensure community cohesiveness and vitality may be very different from the outcome-focused, tactical leadership that is currently so highly valued throughout our culture. The Foundation believes that our community must give significant attention to nurturing local and regional leadership, based on strategic, long-range thinking and meaningful community engagement.

⁸ Alan Fowler, International Development Consultant (interview)

To this end, the Volunteer Centre of Calgary, The Calgary Foundation, McConnell Foundation, Muttart Foundation, United Way of Calgary, Enbridge Inc., Canadian Airlines and other Calgary corporations plan to introduce a collaborative citizenship-building initiative called Leadership Calgary” early in 1999.

PATHWAY #2 Convening and Collaboration

The literature review and the consultation workshops indicate that the new task for community foundations and others is to encourage and to fund the “sinew” of community — the thick network of connections which cuts across and helps to unify the life of our city. A major part of this task is to focus on how to support strategic connections that already exist or could be better structured.

Collaboration, co-operation, and developing partnerships within and beyond the not-for-profit sector were all cited as very critical undertakings in almost all the case studies reviewed. Building these skills and links within Calgary’s not-for-profit sector and beyond was also one of the strongest recommendations made at all three of the consultation workshops. Indeed, the Foundation’s growing role as a bridge between very diverse areas of interest may be more helpful to the process of local community building than was previously recognized. This is because initiatives with this goal must transcend traditional barriers separating individual organizations and fields of endeavour and the mandate of the community foundation.

Mary Anne Zehr (1996) expresses support for this emphasis on the larger community and notes that community foundations are well-positioned to —

- notice connective structure between formal, ad-hoc, informal and non-official groups;

- notice non-legislative, non-programmatic forces that build community;
- see people first as citizens rather than as clients, interest groups, or a general audience;
- appreciate the capacity of the community to act together with a focus on the long-term rather than on short-term issues and outcomes.
- *“Every institution in the city should have concern for the whole city ... A voluntary group may be profoundly and high-mindedly committed to care of the terminally ill and never notice that the community of which it is part is itself terminally ill.”*

PATHWAY #3 Citizenship and Civic Engagement

Citizenship-related activity is the pathway perhaps most closely linked with building civil society and social capital. Engaged citizens are persons with commitment to deal with — but not necessarily solve — societal problems and issues. Engagement involves much more than commitment to national identity or the official rites of citizenship.

Rather, it encompasses building confidence in oneself and others to assume a larger role in public life and to strengthen the commitment, values, and skills required to do so. Building on such insights, Peter Drucker notes that the not-for-profit sector can provide an important venue for the development of citizenship-related values and skills.

Even more important may be the role of ... third sector institution[s] in creating for its volunteers [and staff] a sphere of meaningful citizenship. Now that the size and complexity of government make direct participation all but impossible, it is the human-change institution ... that is offering volunteers a sphere of personal achievement, in which the individual exercises influence, discharges responsibility, and makes decisions.

⁹ John Gardner, Building Community, 1989.

¹⁰ Peter Drucker, The New Realities



The Toronto Community Foundation has initiated an effort to stimulate civic engagement by supporting participatory decision-making, knowledge and skill development, and animated dialogue between diverse community members, and by fostering a shared concern for the common good. The Pew Charitable Trust in the U.S. also runs a program intended to improve civic engagement and rebuild social trust by strategically funding a broad range of community development initiatives.

In Calgary, a new organization called “Celebration Canada” has been formed to promote an understanding of and greater commitment to citizenship. Initiated by former Prime Minister Joe Clark, this organization combines efforts to foster civic engagement and promotes a greater understanding of our unique national identity. Some of this work is carried out under an agency agreement with The Foundation, which has provided financial support.

PATHWAY #4

Organizational Development and Related Information Sharing

The change process of building community capacity stems, in part, from each individual’s and each group’s current capacity to accept and make changes. Therefore, a very basic but fundamental way to build community is to directly support organizational development efforts and organizational capacity building, as a complement to providing support for programs and projects.

The community foundation in Spokane, Washington, sponsored organizational development efforts that other funds had not, such as strategic planning, fundraising, board development, and volunteer recruitment. In Calgary, this kind of organizational development is strongly supported by the Centre for Non-Profit Management, which TCF helped to create, and by the Volunteer Centre, which is supported by TCF and many others in the community.

However, the community consultation workshop participants pressed for even greater effort in this area. They called for more extensive collaboration between agencies around organizational skill development and for more systematic and extensive information sharing relative to capacity building and support for administration activities. More information ought to be exchanged among not-for-profits, between the private and not-for-profit sectors, and between funders and groups seeking support.

Another issue related to organizational development and information sharing is the accountability and governance systems of not-for-profit sector organizations. There has been much discussion about this recently, inspired in part by the Panel on Accountability and Governance in the Voluntary Sector, chaired by Ed Broadbent and created by the Voluntary Sector Roundtable in Ottawa. After conducting a broad survey of the sector, the Panel will make recommendations to government, other funders, and the sector itself. The Panel’s overriding goal is to “help enhance the effectiveness and credibility of the voluntary sector in its ongoing role of strengthening civil society.”

The Panel’s work is guided by five principles:

- The voluntary sector’s role in building social capital must be strengthened.
- A diverse and active voluntary sector promotes a healthy democracy and should be encouraged.
- A healthy and accountable voluntary sector requires capacity, which needs to be strengthened.
- The autonomy and self-governance of the sector must be recognized.
- The diversity of the sector should be more widely recognized.

In their preliminary discussion paper, the Panel recognizes an intimate link between governance, accountability, and community building. Specifically, the paper stresses participatory decision-making. “To the extent possible,” the Panel says, “members, constituencies, users and beneficiaries should be involved in the governance and connected to the leadership of voluntary organizations.”¹¹ Further, not-for-profit organizations must have the capacity to provide staff with time to plan for and move in new directions and to better support the non-paid participation of community members.

PATHWAY #5 Core Funding and a Centralized Site To Facilitate Community Development

The most common and strongest concern expressed by those who participated in the consultation workshops was the need for more secure core funding to support the work of non-for-profit organizations.

Further, the participants believe the community and not-for-profits would benefit greatly from a centralized web-site or similar tool that would enable not-for-profits to submit grant applications to a large number of donors simultaneously. Such a tool would also allow for a better match of applications to different funder interests and priorities. As noted earlier, a number of private foundations also spoke of the potential value of such a web-site.

The Civic WebSite could also be a home for extensive information about major community priorities (determined annually or once every two years), funder priorities, not-for-profit organization programs and priorities, relevant research reports, and broader civic issues. To be most effective, the site should be combined with opportunities for cross-sectoral and city-focused meetings involving a broad range of philanthropic leaders. (A related discussion of a “Chamber of Charities” appears under Pathway #8.)

The five following “Pathways to Community” were also judged to be of great importance; however, they are somewhat more tactical and less holistic than the first five. Making use of them when designing and evaluating initiatives brings a sharper focus to the community building work The Calgary Foundation wishes to undertake.

PATHWAY #6 Children, Youth, and Families

This pathway is unique in that it refers primarily to a population group rather than to an activity or means of action. As is the case in the literature, where children, youth, and families are frequently referred to as a key source of concern, the workshop participants talked at length about focusing on this area because it is where our future lies. However, this concern did not receive a high priority when participants were asked to describe major initiatives that would be helpful in Calgary at this time.

The Ford Foundation community-building initiative referred to earlier saw a number of community foundations engage in youth-oriented community capacity-building programs. Arizona’s Children at Risk initiative, for example, included the development of a Children’s Trust Fund, high-profile public debate on children’s issues, a granting emphasis on prevention and early intervention, and the formation of a public-private coalition. East Tennessee, Central New York, Madison, Baltimore, Rochester, and Greenville, South Carolina, have all engaged in similar initiatives. Memphis and Greater New Orleans focused specifically on teen pregnancy, the latter through a decentralized citizen’ dialogue process. The Mott Foundation has also focused on teen pregnancy, building on the potential that teens displayed through their program “... Youth at Promise, Not at Risk.” Tucson started a community-based family resource centre program. Richmond, Virginia worked more broadly on enhancing family life.



¹¹ E. Broadbent panel report, Building on Strength: Improving Governance and Accountability in Canada’s Voluntary Sector.

Boston and New York modeled a cross-sectoral approach to gang elimination that included representatives of education, social services, arts and culture, and religious institutions.

One way of promoting civic engagement is through fostering community service in secondary schools, teaching leadership skills and the value of participation, tolerance, and social responsibility. The State of Maryland actively encourages community service, partnering high schools and the voluntary sector as part of the core curriculum. A group of Michigan Community Foundations intending to engage in meaningful citizen-building studied a number of local, all-teen youth advisory committees that are responsible for fundraising and grant-making to youth-oriented projects and programs in all fields. The United Way of Calgary and area is currently giving considerable priority to projects that provide learning opportunities for children and youth. Child Friendly Calgary has both a volunteer youth corps and a youth-granting foundation.

For further information on the community foundation initiatives focused on children, youth, and families that are supported by the Ford Foundation Leadership Initiative, see Mayer (1994, Chapter 6).

PATHWAY #7

Community and Neighbourhood Development

Some writers see community and neighbourhood development initiatives as the cornerstone of community building. Julie White, of the Trillium Foundation in Ontario, argues that neighbourhood development efforts, particularly those concerned with creating gathering places, are integral to building social capital. However, the need to address major urban community development issues may not be as acute in Canada as in the U.S., where the majority of the community-building literature originates. Canada has fewer problems with the infrastructure

of its cities as well as fewer concerns relating to personal safety and security and to the concentration of intense poverty, though these concerns are growing. Yet, even in the midst of our less dire circumstances, the focus on neighbourhoods as meaningful places for citizen action remains relevant. People are most able to see the results of their efforts at the local level. Work at this level helps to create the thick network of meaningful relationships that civil society is defined by and dependent upon, the relationships that centre around substantive issues first experienced at a local and personal level.

Mayer and Sheie (1989) have written a guide for community foundations supporting low-income neighbourhood organizations.

They point out that such an initiative involves risk-taking, given the commitment to inclusiveness, social justice, empowerment, and the full participation of citizens in community affairs. They identify the four main goals of a typical neighbourhood-granting program as follows —

- to increase the base of resident participation and leadership in developing solutions to neighbourhood issues;
- to increase the capacity of neighbourhood organizations to plan and implement neighbourhood improvement strategies;
- to increase the linkages between neighbourhood organizations and other institutions capable of providing support;
- to increase the financial and other resources available to neighbourhood self-help community-building efforts.

Technical assistance is generally provided as one part of such programs. This assistance may come through direct involvement of community foundation staff, or through the financial support of a local

organization or individual hired to plan and operate a program of response assistance within the community. Technical assistance may be directed to the neighbourhood as a whole, to individual organizations within the area, and/or to activities that reach across a number of neighbourhoods simultaneously — e.g., through open workshops.

Neighbourhood building takes many forms. Neighbourhood-based visioning processes, sweat equity projects, community gardens, participatory urban design, and the creation of a neighbourhood “common area” all build neighbourhood. Little Rock, Arkansas, for example, took a multi-sectoral approach to neighbourhood development, with the explicit purpose of enhancing and broadening social capital. In Roanoke, Virginia, the public convened in a vigorous, citywide planning and neighbourhood revitalization process that set a precedent for collaboration based on shared values. The Pew Charitable Trust has established a fund intended to enhance the physical, economic, and social revitalization of Philadelphia’s disadvantaged communities. Through its recent reorganization towards asset-based social investing, the Ford Foundation has become involved in community economic development, forging inter-sectoral partnerships, capitalizing revolving loan funds for micro-businesses, and investing in affordable housing.

A host of Calgary organizations — formal and informal, registered and non-registered — are currently engaged in various forms of community and neighbourhood development. Some examples include:

- Inner-city community organizations
- Business Revitalization Zones
- Housing co-operatives
- Community gardens

- The Bow Chinook Barter Community
- The Mennonite Central Committee
- Habitat for Humanity

The City of Calgary is addressing neighbourhood development through some activities of the Calgary Police Service, and through the Departments of Parks and Recreation, Community and Social Development, and Planning and Building. The Calgary Foundation has recently funded a number of neighbourhood development initiatives that are considered to be an important complement to its other granting efforts.

PATHWAY #8: Advocacy for the Sector and Clarification of Community Values

Many foundations in North America have played a key role in reflecting and shaping public values and in planning for major systemic and policy changes; collectively, they must continue to engage in advocacy. Susan D. Philips from the Canadian Centre for Philanthropy sees representing sectoral issues and community values to the government and the corporate sector as a critical task for not-for-profits. (Philips, 1995) Indeed, organizations that adopt an “intermediary role,” representing the entire voluntary sector, and that enjoy widespread citizen involvement, are seen by many authors as crucial to the formulation of public policy. Without such organizations, some relatively more marginalized groups such as the poor, First Nations’ peoples, the disabled, new immigrants, and inadequately financed not-for-profits often have only a limited voice. Others argue that the not-for-profit sector must also engage in creating a new set of shared community values.



As expressions of community, [voluntary organizations] and youth issues in Arizona, Tucson, and Baltimore. represent the identities, interests and concerns of their communities, memberships and clients with a view to changing public policy, educating the broader public and influencing the behaviour of society at large. In so doing, they create and maintain political spheres in democratic discourse for their constituencies, often-disadvantaged ones.

One example of an advocacy rallying point is the position of the voluntary sector relative to provisions of the Canada Income Tax Act. A number of possible changes to the Act were strongly endorsed by workshop participants. Similarly, the Broadbent Panel on Accountability and Governance in the Voluntary Sector recommends amending the Act's definition of "charity", as they believe the current definition is out of step with the values and priorities of Canadians.

Should community foundations become involved in advocacy? To some degree, they already are — when they grant, they advocate. But is there a place for more overt forms of advocacy? Should community foundations encourage citizens to organize and bring forward their views? Should foundations take an explicit stance on an issue? Some argue that advocacy is a crucial responsibility of foundations. Philanthropist Charles Halpern maintains that "advocacy gives voice to those who are silenced by a lack of resources or access, and assures that all points of view are adequately heard on critical questions ... advocacy touches on the very essence of the democratic process." Concrete examples that Halpern's foundation have been involved with include funding anti-censorship initiatives to support the arts, supporting public transit awareness, awarding grants to student environmental groups, and supporting an organization which examines and critiques public and budgetary policy.

Building coalitions around particular issues is an excellent example of the "sinew" funding that was referred to earlier. Community foundations have sponsored coalition building on children

and youth issues in Arizona, Tucson, and Baltimore. However, David Chrislip (1994) cautions that coalition building for advocacy can work against the processes of true collaboration, since coalitions can polarize a community.

The Minnesota Headwaters Fund, established by a partnership of Minnesota Foundations, funds only those organizations engaged in advocating for social change. The Boston Foundation set out to define and establish a new social contract between citizens and public and private institutions. This contract sets out goals to "recognize and honour the rights, responsibilities and interdependence of all members of the community." Called a "value clarification" project by some, this effort involved an inclusive, participatory process of "deep listening."

It is important to note that the Canada Income Tax Act prohibits charitable organizations from engaging in advocacy if this activity constitutes more than 10 per cent of their total work. Furthermore, there continues to be considerable confusion in the not-for-profit sector as to how Revenue Canada defines "advocacy," and many registered charities are very reluctant to become overtly involved in advocacy activities.

An excellent study of the need for a "Chamber of Charities," a new agency that represents and speaks for the not-for-profit sector, has been prepared by the Volunteer Centre of Calgary, sponsored by the Muttart Foundation (Stewart, 1998). The Calgary Foundation served on the Advisory Committee that helped to develop this report. The proposal was very strongly endorsed by consultation workshop participants.

PATHWAY #9: Maximizing Inclusiveness and Responding with Care to Diversity

Increasing cultural awareness and understanding diversity across the divides of race, culture, income, ability, and other variables is a key, cross-sectoral

¹² Susan Phillips, "Redefining Governmental Relationships with the Voluntary Sector" (1995, p.9)

pathway that will help to build community capacity in Calgary. There is a natural, logical connection between a foundation's convening role (see Pathway #2) and the willingness to invest in mutual understanding.

[Building community involves] doing more than investing money. Foundations have the capacity to convene people who are doing civic work in their communities, so that they may learn from each other and support each other. It's about supporting the people who are out there in communities, working to broaden participation and democracy, to help them cross some of the lines of divisiveness — such as race and class — in society

Many have noted that measuring civic engagement based only on traditional or somewhat exclusive organizations is insufficient. If we are to capture the diversity of our city, we must look beyond those organizations that have charitable status and include the many other organizations that also build community— community associations, fraternal groups, cultural agencies, and others. Convening must encompass all areas within the charitable sector (education, social services, arts and culture, health, environment, and recreation), but it must also reach out to include all other major sectors of our society if it is to be broadly effective. Though some argue that civil society is undermined by a pluralist society, TCF feels that an understanding and acceptance of diversity can, and must, be part of a new shared set of community values.

Chrislip (1995) identified a good example of convening across race and class lines: The Baltimore Commonwealth, where African-American grassroots groups formed what was at first an uneasy partnership with predominantly white business leaders around the issue of reinvesting in education. The Dade Community Foundation in Miami and a variety of Minnesota Foundations foster community cohesion by supporting grassroots groups actively involved in promoting cultural understanding.

The Ford Foundation's "Education, Media, Arts and Culture" program is attempting to immerse the value of tolerance in teaching democratic values through cultural, arts, and media studies. In Calgary, the Diversity Learning Institute and the Arusha Centre are two organizations that promote tolerance and understanding of racial and ethno-cultural differences among citizens.

PATHWAY #10: Holistic and Preventative Approaches

Workshop participants frequently mentioned the need for a holistic and preventative approach to service delivery. This is probably the broadest concern addressed in this report.

Holism and prevention are distinct but overlapping concepts. In an organization focused on health care, for example, a holistic approach might take into consideration diet, exercise, quality of life issues, and alternative therapies. Obviously, such an approach could also be seen as preventative. Many of the youth programs described earlier in this document could also be considered to be preventative. As is the case in convening and collaboration, virtually all case study initiatives reviewed by the authors are guided by an emphasis on holism and prevention.

The Calgary organizations engaged in holistic and preventative approaches are too numerous to mention. They cut across the entire not-for-profit sector. While most organizations, such as those in the fields of recreation or arts and culture, do not actively consider their work to be holistic or preventative, their work does fit under the umbrella of holism.

¹³ Mary Ann Zehr, "Getting Involved in Civic Life" (1996, p. 22)



EXPLORATION *of* POSSIBLE INITIATIVES

The extensive literature review summarized earlier in this volume helped us to better define the five key concepts that gave initial focus to our interest in building community:

- Collaborative philanthropic leadership
- Civil society
- Asset based development
- Building capacity (commitment, resources and skills)
 - Building community capacity & building organizational capacity
 - Building TCF's capacity to build capacity
- Building stronger links between donors, leaders & priority issues in all sectors *and across the not-for-profit sector*

The review and our discussions with workshop participants also led us to identify ten strategic emphases, ten “pathways”, that will inform the detailed planning we must now do to implement the major initiative. Each of the pathways has been summarized in the previous “Exploration” section of this report.

Building on all of this material, the consultation team and the Advisory Committee then turned to the task of identifying and evaluating possible larger initiatives that could be undertaken by TCF in partnership with others during the months and years ahead. Ultimately a list of ten possible initiatives was developed, and each of these was subjected to a careful evaluation. Some were rejected, others were combined, and others were refined and expanded. Information

regarding each of the ten possibilities, and comments on the evaluation process are summarized in the balance of this report.

As an initial response to the information and insights gathered during the consultation, a list of ten possible initiatives was developed for consideration by The Calgary Foundation.

First, each of the ten initiatives was carefully described, using the following template:

- a) Key idea driving the initiative
- b) Objectives of the initiative
- c) Linkage with the ten pathways to community
- d) Implementation strategies (not shown below)

This approach provided TCF with a brief but powerful summary of each initiative and clarity regarding how it links with the community-building pathways gleaned from the literature review and from the workshops. The ten initiatives are presented in abbreviated form on the following pages.

1. City-wide Visioning, with a focus on civic engagement

IDEA Convene a citywide public participation initiative to establish a shared vision of Calgary life in the future.

- OBJECTIVES**
- 1) Establish a shared holistic vision of Calgary life in the future.
 - 2) Generate public discussion on the value and role of civic engagement, philanthropy, the not-for-profit sector, and citizenship responsibilities in order to promote concern for the common good.
 - 3) Give the not-for-profit sector a stronger voice alongside others on the public stage, so that its stature is raised relative to that of government and the private sector.
 - 4) Convene a diverse group of people in a respectful way to encourage mutual understanding and empathy.



2. Healthy Neighbourhoods Program

IDEA

Establish a "Healthy Neighbourhoods" program through which TCF would engage more directly in community development initiatives, and support capacity-building among local leaders.

OBJECTIVES

- 1) To enhance the role and visibility of neighbourhood communities within the larger city
- 2) To improve the quality of neighbourhood life of Calgarians
- 3) To bring services into closer linkage with people's lives
- 4) To encourage citizens to build and use community-based services
- 5) To encourage greater involvement in community issues and -enhance opportunities to participate at a local level



3. Web-based Information Site and Project-funding Process

IDEA

Develop an Internet-based system to provide information about community priorities and funding and project information, helping to build efficient links between individual donors, funders and project leaders.

OBJECTIVES

- 1) Streamline the funding application process to allow some redeployment of resources away from fund development and towards the “best work” of each organization.
- 2) Foster widespread and efficient information sharing by non-profits
- 3) Facilitate increased knowledge of non-profit and citywide issues
- 4) Improve and expand collaboration between funders
- 5) Link donors and funders with community priorities and project outcomes, to help deepen reflection on granting decisions

PATHWAYS

Visioning and Leadership

• **CONVENING AND COLLABORATION**

Citizenship and Civic Engagement

• **ORGANIZATIONAL DEVELOPMENT AND INFORMATION SHARING**

• **CORE FUNDING AND A CENTRALIZED SITE RE: COMMUNITY DEVELOPMENT**

Children, Youth and Families

Community and Neighbourhood Development

Advocacy and Value Clarification

Maximizing Inclusiveness and Care Regarding Diversity

Holistic and Preventative Approaches



4. Serving Together: a focus on building stronger links between marginalized communities and a broad range of not-for-profit organizations

IDEA

Undertake an initiative designed to build collaboration and share learning among not-for-profit agencies serving, or wishing to extend services to, particularly marginalized communities.

OBJECTIVES

- 1) Foster cross-sectoral collaboration and sharing to become more efficient, effective, and integrated
- 2) Enhance the involvement of consumers in agency programs in order to bring services closer to people’s lives
- 3) Create ways of more actively and meaningfully involving citizens in programs, thereby building citizenship values and skills
- 4) Foster extensive team building among and within organizations
- 5) Seek to better understand and meet consumer needs



5. Partnership Academy: practical skill development for collaboration

IDEA Initiate a mentoring program that focuses on “building partnerships,” beginning with The Calgary Foundation’s own partnership with another community foundation.

- OBJECTIVES**
- 1) Investigate ways of enhancing the skills of not-for-profit groups to define and implement shared initiatives and joint programs with each other and with other sectors
 - 2) Support existing and new collaborations and partnerships between organizations and sectors so they can become more efficient and effective
 - 3) Provide funding for training, mentoring, monitoring, and evaluating partnership and collaboration activities

PATHWAYS

- Visioning and Leadership
- **CONVENING AND COLLABORATION**
 - Citizenship and Civic Engagement
- **ORGANIZATIONAL DEVELOPMENT AND INFORMATION-SHARING**
 - Core Funding and a Centralized Site re: Community Development Children, Youth, and Families
 - Community and Neighbourhood Development
 - Advocacy and Value Clarification
 - Maximizing Inclusiveness and Care Regarding Diversity
 - Holistic and Preventative Approaches

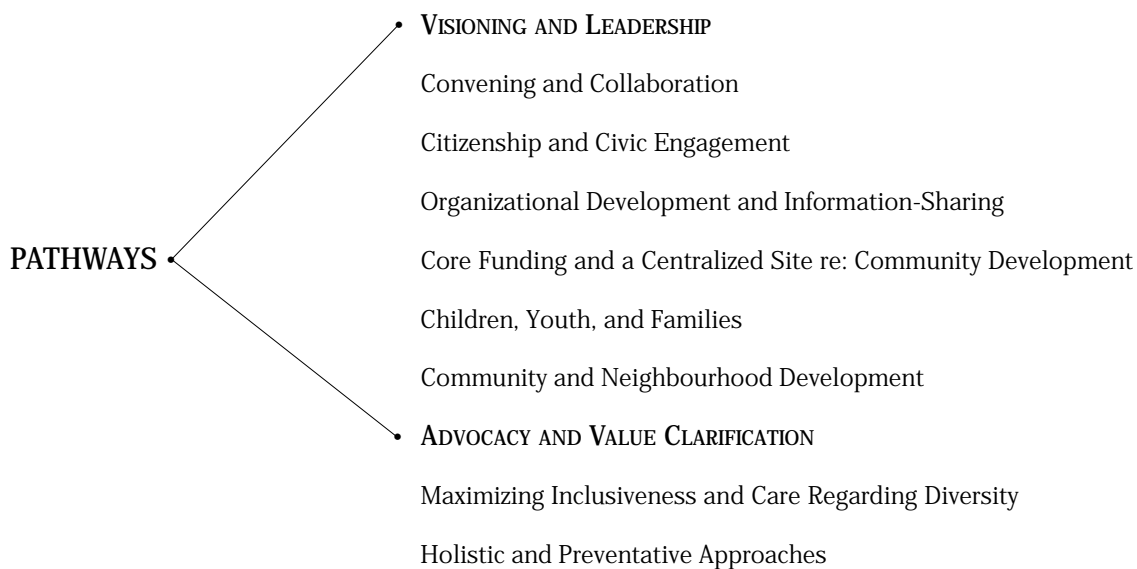
6. Philanthropy and You: A Social Marketing Initiative

IDEA

A social marketing endeavour intended to raise the profile, and understanding of the not-for-profit sector,

OBJECTIVES

- 1) Generate extensive public discussion on the value of philanthropy, the not-for-profit sector's role in society, and citizens' responsibilities as a way of achieving greater civic engagement
- 2) Develop a joint, focused "voice" and/or representative body for the not-for-profit sector so that it is more widely known, valued, and supported
- 3) Raise philanthropy and citizen responsibility to new levels of awareness in order to strengthen civil society



7. Philanthropy and Youth

IDEA

A youth-oriented, philanthropic initiative designed to engage Calgary’s youth in all aspects of grant-making and not-for-profit activity (possibly partnered with Child Friendly Calgary).

OBJECTIVES

- 1) Raise the profile of children and youth and their contribution to community life in Calgary
- 2) Deal with societal issues in a preventative and holistic way by focusing first on young people
- 3) Be future-oriented, recognizing that youth engagement is the key to the future health of a civil society
- 4) Increase the opportunities available for Calgary youth to volunteer in the community



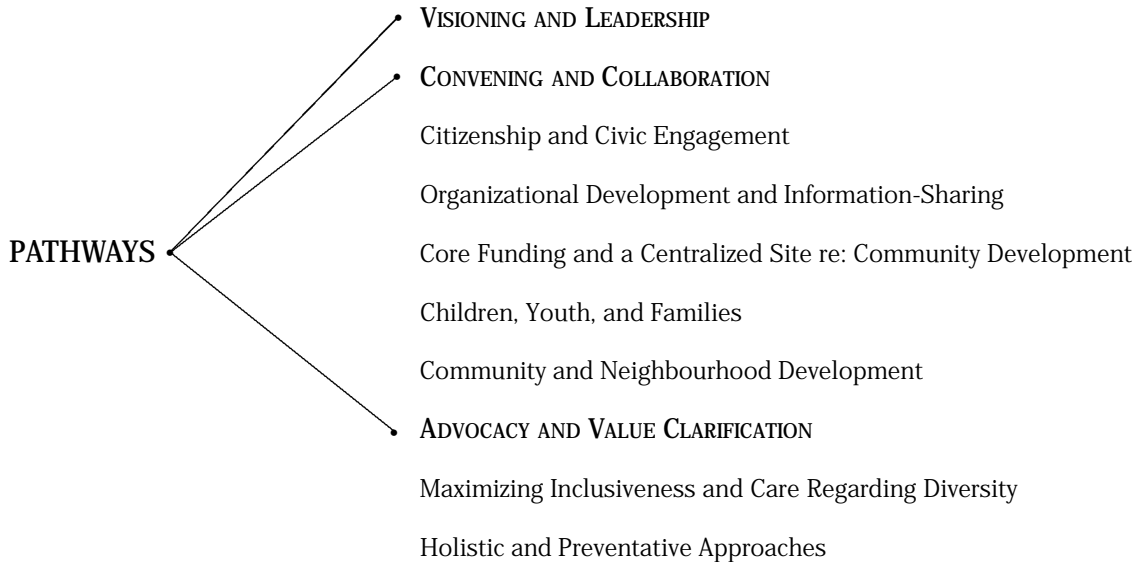
8. Establish a “Chamber of Charities” (as defined by the Muttart Foundation)

IDEA

Partner with the Muttart Foundation, the Volunteer Centre, and others to establish a “Chamber of Charities.”

OBJECTIVES

- 1) Develop a joint, focused “voice” and/or representative body for the not-for-profit sector in order so it will be better recognized and supported in the community
- 2) Address the not-for-profit sector’s desire to seek tax system changes and develop ways to address the need for stable, longer-term funding



9. Investing in Public Venues that provide focus for Building Community

IDEA: The Calgary Foundation would focus on creating opportunities to partner with citizens, donors, and the government and business communities to develop public venues where citizens can come together to create, celebrate, debate, work, and be together.

- OBJECTIVES**
- 1) Create spaces and ways for citizens and organizations to come together for safe, respectful, and creative dialogue
 - 2) Provide spaces for the exercise of citizenship rights and responsibilities at both a community and citywide level
 - 3) Help foster a sense of place and of community identity
 - 4) Recognize a holistic vision of community life and health



10. The Our Millennium Project, developed by Community Foundations of Canada.

IDEA:

This Canada-wide initiative will encourage Canadians to come together in small groups to reflect upon the kind of community they wish to pass along to the people of the next millennium, and to make symbolic 'gifts' to help create that future. The gifts — gifts of time, money, energy, and commitment — will signify the hopes, values, and priorities of Canadians for the future well being of our communities.

OBJECTIVES

- 1) Generate extensive public discussion on the values and visions that are cherished by our citizens, affirm these reflections, and encourage engagement in activities that help to build community
- 2) To help promote a deeper understanding of and commitment to the domain called "civil society"
- 3) To raise public understanding of the role that not-for-profit organizations and other civic-minded groups play in maintaining the quality of our common life



EVAUATION *of* POSSIBLE INITIATIVES

Each of the ten initiatives was evaluated in terms of its potential impact on the community and its suitability for TCF at this stage in the Foundation's development. The evaluation involved structured discussions with the following groups:

- the Consultation Advisory Committee;
- seven organizations who work in the area of community development and who had recently applied to TCF for funding support;
- fourteen individuals with specialized experience and knowledge relating to community and neighbourhood initiatives;
- the Foundation's Board of Directors.

As comments and ratings were received from each group, the project's definitions were modified and refined. Although the discussions with each group were structured somewhat differently, each included direct or indirect reference to the following questions:

Will there be significant payoff for Calgary and the surrounding area?

- a) Is there significance for the broader community in the idea and the objectives?
- b) Will the initiative have an impact on the depth and quality of community in our city?
 - Can some of this impact be immediate?
 - Can the impact be sustained for at least three years?
- c) Does the initiative focus on community assets and on the development of capacity, rather than

on deficits and the resolution of problems?

- d) Will the outcomes and benefits be clear and meaningful?
- e) What projects are more likely to attract funding support from organizations other than the Foundation at this time?

Will there be community support for TCF's involvement with and leadership around the key issue, and will the initiative build linkages within and beyond the not-for-profit sector?

- a) Will local organizations and leaders support the Foundation's involvement?
- b) Is the Foundation's involvement in this issue seen to be appropriate?
- c) Does the issue invite convening effort, partnerships, and collaboration?

Is the initiative compatible with the mission and internal priorities of TCF?

- a) Is it consistent with the cross-sectoral emphasis of a community foundation, and consistent with TCF's current values, goals and practices?
- b) Does it maximize use of current Board and staff knowledge, networks, time, and skills?
- c) Does it build upon research results regarding effective approaches to building community and to the development of collaborative leadership skills?

- d) Does it qualify as “charitable activity,” as defined by the federal regulations that govern TCF?
- e) Is it practical, and adaptable to changes that may occur in our city during the months and years ahead?
- f) Would it promote both greater awareness of TCF and asset development?
- g) Will it engage other funders who are committed to building community?

The evaluation of the ten initiatives unfolded as follows:

First, TCF decided not to pursue the city-wide visioning process (Initiative #1). A similar process was undertaken by the City of Calgary in 1990, and was followed in 1994 by a supplementary review of the economic impact of the arts on Calgarians, initiated by Dr. Tom Wood, President of Mount Royal College and prepared by Dr. Douglas West. More recently, Reuben Nelson, a futurist, has organized a province-wide discussion of the visioning and leadership skills required to adequately address the future.

Rather than modify and repeat those initiatives, The Foundation decided to build on them, working on initiatives that are more narrowly focused and more likely to yield tangible results during the next two or three years.

TCF then agreed to combine Initiatives #2, #4, and #9 into a single “**Healthy Neighbourhoods Program.**” Further, It was recognized that elements of the Philanthropy and Youth Initiative (#7) could be built into this program.

This decision to focus on building community at the neighbourhood level serves to address TCF’s growing interest in projects that encourage civic engagement, value clarification, community development, and the experience of community. Focusing directly on neighbourhoods and the links between neighbour-

hoods, as well as on the values and forces that work for and against social cohesion and the experience of community, serves an important purpose.

It challenges the Foundation to learn much more about and to help sustain the deeper dynamics of our culture — the commitments, root values, root metaphors, generative themes, and skills that have given rise to our civil society and to the not-for-profit sector.

Considerable debate followed relating to the Web-based Information Site and Project-funding Process (Initiative #3) and the Chamber of Charities (Initiative #8). The following positions emerged:

- Some believed the two are complementary and belong together. By emphasizing the need for dialogue to identify common issues and concerns, the Chamber gives a “more human touch” to the proposed Web-based Information Site. By building efficient links between donors, funders, and project leaders, the Information Site adds greater immediate utility to the Chamber of Charities initiative. It also helps to soften any sense of division and tension between the not-for-profit sector and the other sectors — i.e., government, the corporate sector, and neighbourhood communities.
- Others felt the proposed Chamber of Charities addresses a very strong need for advocacy for the not-for-profit sector, and that this emphasis may be diluted by the focus on linking donors, funders, and project leaders that is built into Initiative #3. Further, the Muttart Foundation wishes to undertake further study before deciding whether support the proposed Chamber of Charities. Given that Muttart funded the research that underlies this idea (Stewart, 1998), it seemed appropriate to some to delay further review of a stand-alone Chamber of Charities at this time.



- Some argued that a centralized source of information and a centralized mechanism for linking all that are interested in building community was highly recommended by the private foundations and by many workshop participants.
- Others argued that there are major technical and inter-organizational difficulties associated with the development of such a Centralized WebSite, and that it is likely to become an unwieldy and unworkable tool.
- Some noted that the WebSite is simply a means to an end — a way of increasing linkage between all who are interested in building community — and that it should be bundled together with other ways to achieve the same end. It may be a good idea, but it is not sufficiently important to stand alone as a truly major initiative.

Based on this, TCF decided to develop a more detailed proposal for the **Web-based Information and Funding Site** (Initiative #3), and to delay further review of the stand-alone Chamber of Charities (Initiative #8). In addition, working collaboratively with others around the design and creation of the Information Site could provide an excellent opportunity for TCF and others to learn more about the many involved in effective collaboration and collaborative leadership. Thus, this initiative could also encompass Initiative #5, the Partnership Academy.

The Foundation then turned to an evaluation of the social marketing initiatives, #6 and #10. It was decided to focus on participation in the “**Our Millennium Project**” (#10), working closely with Calgary 2000. From TCF’s perspective, this Canada-wide initiative being developed by Community Foundations of Canada has the potential to evoke thousands of positive expressions of vision and commitment, as citizens from across Canada and locally give “voice”

to the values, hopes, and priorities that give meaning and direction to their lives. As such, this project could strongly complement and reinforce the two priority initiatives: Healthy Neighbourhoods and the Web-based Information Site. Furthermore, it is very strongly linked with Pathways #1 (Visioning) and #3 (Citizenship and Civic Engagement), two pathways that TCF values highly.

Finally, careful consideration was given to the creation of a **Civic Investment Loan Fund** that would be accessible to registered not-for-profit organizations. This idea arose from review of a number of successful loan funds established in the United States by various community foundations. Such a fund would allow TCF, in partnership with other donors and funders, to leverage some portion of the limited assets currently available to the not-for-profit sector in a new way — by recycling a portion of its capital via civic investment loans. Making a loan when appropriate, rather than a grant, recognizes that not-for-profits are sometimes confronted with financing and cash flow issues rather than with revenue requirements, and that creative assistance in this area may be another important way to strengthen this sector. U.S. experience has shown these loans to be very successful: the rate of repayment is very high, and the impact on the charities and on the community foundations has been very positive. This initiative relates primarily to Pathways #4 (Organizational Development) and #5 (Concern for Core Funding).

Combining the short list into one Multi-faceted Major Initiative

Initially, TCF intended to choose and implement only one of the ten initiatives. However, as the evaluation moved forward, it became increasingly clear that each of the four projects referred to above has significant potential and that each of them complements and

enhances the other, in a way that effectively embodies TCF's commitment to building community in a cross sectoral way. Thus, the first three were combined into the single, multi-faceted major initiative which includes: the Our Millennium Project, the Neighbourhood Grants Program, and the Building

Community Information Centre and Calgary Civic WebSite. Each of the components has been described at length on pages 8 to 14 in Volume I of this report. The Civic Loan Fund has been described in Appendix K. This will be pursued as a separate stand-alone project, separate from the Major Initiative.



CONCLUSIONS

The Calgary Foundation believes implementing the Major Initiative as a single project will constitute a solid contribution to building both community strength and not-for-profit organizations. Further, the initiative builds on the “value adds” of a community foundation in the following ways:

- It has a very broad and long-term focus, which is consistent with a community foundation’s emphasis on building endowment funds that help to enrich all facets of community in perpetuity.
- It focuses directly on the network of values and commitments that undergird community, thereby helping to strengthen both the broader community and the entire range of not-for-profit organizations that are valued by Calgarians.
- It challenges the Foundation to bring together diverse Calgary voices and to encourage increased collaboration both within and beyond the charitable sector.
- It encourages continued tracking of community priorities through the WebSite and allows for systematic review granting decisions with reference to these priorities. This has the potential to increase the capacity of the sector as a whole and of individual organizations within the sector.
- It helps to address the quest for longer-term funding stability and sustainability for a broad range of not-for-profits, by reducing the costs involved in raising funds simultaneously from many different funders.
- It enables the Foundation to leverage resources in new and innovative ways, and so has the potential for new links between private, corporate and government funders.

We look forward to working with others in the detailed design and implementation of all components of the major initiative.

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