

Study Visit Information Package
Community Foundations
Slovakia
June 5-9, 2007

Community Foundations

Community Foundations are a specific type of philanthropic organizations, usually geographically based, focused on development of communities through mobilization and distribution of funds. Community foundations may cover a variety of issues that are relevant to communities where they are active - social, cultural, education, public spaces etc. Community foundations focus on engaging a wide variety of donors and making grants to nonprofit, community actors active in the supported fields.

Community foundations have a specific niche in the nonprofit field. On one hand, they seek funds offering potential donors opportunity to be engaged socially through specifically designed mechanisms (a variety of funds). On the other hand, they act as a grant-maker in support to community initiatives. While they seek to engage multiple community stakeholders – such as companies, nonprofit organizations, governmental institutions, they also seek to maintain independence from these organizations and build public trust through existence of independent board, clear and transparent grantmaking procedures, wide communication of goals and financial operations.

Community foundations have began in United States at the beginning of the last century. Presently, there are 1,175 community foundations in 46 countries, on all continents. The first country to successfully adapt community foundations outside North America was United Kingdom. In the last ten years, community foundations have been developed in countries in Central and Eastern Europe, including Slovakia and Poland.

Association for Community Relations (ARC)

ARC contributes to mobilizing local financial resources for the benefit of communities. For this, ARC builds better relations between nonprofit organizations, companies and citizens, so they can work together and support each other.

In its five years of existence, ARC has developed a growing and continuous range of programs and services to support nonprofit capacity to mobilize resources from private sources – such as companies and individuals, to support company social involvement as well as to promote the specific resource mobilization opportunities and mechanisms. ARC offers training and consulting services for nonprofits, acts as a partnership broker for nonprofit-company projects, stimulates exchange and learning between socially involved companies, promotes successful examples of private resource mobilization. In the last two years, ARC has started to test out opportunity and potential of community foundations in Romania – identifying key actors interested to learn more and initiate such organizations in 2-3 pilot communities. We see in community foundations a long term platform for transparent and effective mobilization and distribution of funds for community benefit. More information at: www.arcromania.ro

Center for Philanthropy Slovakia

The Center for Philanthropy's (CfP) mission is to promote and develop philanthropy and identify traditional and non-traditional resources for the benefit of non-profit organizations. It is registered as a non-profit organization providing public benefit services. Its staff is 6 full time program managers with a variable number of part time assistants. Center for Philanthropy (CfP) was formally formed (spun off) in August 2002 from its 10-year operation as ETP Slovakia in response to the need for promotion and development of philanthropy in Slovakia. Currently CfP provides services to domestic corporate donors. Its clients are large, multinational corporations (Orange, Tatra Banka, Slovak Gas Company) and the Center provides them technical assistance in designing, implementing and evaluating their corporate philanthropy programs and takes care of their foundations.. Also, the Center promotes learning and exchange in the field of community foundations, both in Slovakia and in the region and is an active actor in the dialogue between the government and NGOs on legal and fiscal environment. . The Center's staff has organized in last five years number of exchange visit to Slovakian community foundations for groups from the following countries: Latvia, Lithuania, Ukraine, Moldova, Croatia, Macedonia and Slovenia. The Center is a member of the WINGS-CF Network.

Scope of the visit

With all the unique characteristics of community foundations a full understanding of role, niche and specific mechanisms relevant for their work can be only built in time. One way to contribute to such understanding is through direct observation and discussion with key stakeholders in communities where such organizations operate.

In this context, we see a 3 day visit to 3 community foundations in Slovakia and to community foundations support organization as a key tool to support increased understanding of:

1. niche and specificity of community foundations as actors in local development and key contributors in national development;
2. specific mechanisms used by community foundations to perform their resource mobilization and redistribution functions (e.g. setting up and administering transparently specific funds).

Additionally, participants will be able to engage in dialogue related to relevance of community foundation in own town as well as specific institutional framework for setting up and administering the foundation (e.g. role of boards, functional committees, executive and staff).

Participants

The visit aims to bring together various actors from 3-4 communities in Romania that so far manifested interest in such framework – Cluj, Alba Iulia, Satu Mare and Odorheiu Secuiesc. The groups usually include representatives of key businesses, government, media and nonprofit organizations from the 4 communities.

Program Facilitation

Program facilitator and Coordinator – **Mr. Marcel Zajac** is responsible for maintaining group focus and program continuity. The program facilitator is experienced in philanthropy concept, fundraising of NGOs, understanding of the overall political and legal context, and strategic issues in order to lead discussions and ask questions on behalf of the participants when necessary. The facilitator accompanies training participants to all program sessions and site visits in order to prevent repetition and ensure that each session is linked to the goal of the study visit. He is responsible for all logistics connected with the lodging, common meals, transportation, translation of materials and interpretation during the training.

Community foundations included in the site visit

The visit will start with an introduction on Slovakian community foundation field – evolution, recent developments, map of community foundations, types of funds used, income sources, cooperation between community foundations. Center for Philanthropy consultants will also facilitate debriefing session at the end of the visit with summary of relevant information, key learning points as well as further questions raised through the visit.

The visit will also include 3 – relatively different community Foundations.

Bratislava Community Foundation

<http://www.knb.sk/>

Bratislava has approximately 450,000 inhabitants. Bratislava community foundation has been established in 2000. It has 4 staff. The Foundation`s vision is to develop giving as well as build good relations among Bratislava residents. We are eager to motivate Bratislava people to become local patriots and have a stake in improving the quality of life in the city.. Unlike all other CFs in Slovakia this foundation has been established by individuals. It is different also because it is very focused on generating local income that shall be oriented for grantmaking – other CFs do organize variety of operational activities. This is one of the youngest CFs in Slovakia), very strong in innovative fundraising and fund development activities and in its orientation on cooperation with the business sector. Its main corporate partners are Citi Bank, CSOB Bank, Orange, Slovak Savings Bank. The foundation is looking for ways how to modify program concepts from abroad for local conditions but also develops onw program concepts. (Y4BA - Youth for Bratislava as a modification of Youth Bank concept) or (Give a Book) or Cup of Coffee for Bratislava.

Income by donors	As of 31. 12. 2006
Citibank (Slovakia) a.s.	700 000 (€ 21,200)
Association of CFs in Slovakia	365 000 (€11,000)
2% of the tax assignation of individuals and corporations	2 412 000 (€73,100)
Gifts to funds	1 402 000 (€42,500)
Individual donors	228 000 (€6,900)
Total Income	5 107 000 (€154,700)

Exchange rate: € 1 = 33 Sk

Liptov Community Foundation

Hotel Smrek, SNP 172

033 01 Liptovský Hrádok

tel.fax: +421 44 5221298

e-mail: hotline@frl.sk, www.1percento.sk

<http://www.knl.sk>

Executive Director is Jana Ilavská.

The mission of the Liptov Community Foundation is to improve a quality of life in the Liptov region through the development of giving and supporting activities focused on: development and protection of spiritual and cultural values, protection of the environment, preservation of the values of nature, health protection, children and youth rights, development of science and education, financial support for public benefit activities in Liptov region and promotion of the cities and villages of the whole Liptov region. Liptov community foundation serves 2 cities in its region Ruzomberok and Liptovsky Hradok, each of approximately 50,000 inhabitants. The foundation has been established in 2003 as a offspring of the Fund for Development of Liptov Region, which existed since 1998. It has a staff of 3.

REVENUES BY SOURCE 2005

Income from sale of services	151.000,00 Sk	9,42 %
Interests	2.408,00 Sk	0,15 %
Revenues from stocks and securities	24.207,00 Sk	1,51 %
Received gifts from corporations and foundations	982.289,00 Sk	61,30 %
Received Gifts from individuals	266.219,00 Sk	16,62 %
2% Tax assignation	176.119,00 Sk	11,00 %
Total Revenues	1 602.242,00 Sk	100,00 %

Prešov Community Foundation:

Address:

Požiarnická 17, 080 01 Prešov

Tel/ fax: 051 7721 857

E-mail: knp@knpresov.sk

www.knpresov.sk

Executive director: Katarína Minárová

KNP seeks to develop local philanthropy and to support the building of social capital in the city of Prešov. To its donors, KNP offers possibilities to support meaningful activities that improve living standards for the entire community. KNP effectively targets raised funds to support solutions to the most pressing issues of the community and to seize interesting opportunities that can make life in Prešov nicer and better.

KNP in numbers:

Year established : 1996

Coverage: 110 000 inhabitants

INCOME BY SOURCE 2005

City of Prešov	300,000 Sk	(€ 90,000)
Ekopolis Foundation	55,299 Sk	(€ 1,675)
Gifts and contributions	759,846 Sk	(€ 23,025)
2%	1 299 728 Sk	(€ 39,385)
Revenues from securities	16,908 Sk	(€ 512)
Interests from bank	1,276 Sk	(€ 38,6)
Revenues from long term investments	72,200 Sk	(€2,187)
Exchange rate profit	10,710 Sk	(€ 324)
TOTAL	2,515,967 Sk	(€76,200) app.
Registered endowment	36,000 EUR	

Itinerary

The whole duration of the visit including travel is 5 days. Proposed itinerary goes as follows:

First day, Tuesday, June 5th

Start in the morning (between 8:00 and 11:00 depending on location)

Lunch time (decide location)

Arrive in Bratislava in the evening

Dinner in Bratislava in 1st Slovak Pub at Obchodná street.

Accommodation: Hotel Sorea, 3 stars

Kralouske Udolie 6, Bratislava

+421/2/544 14 442

www.sorea.sk

Second day, Wednesday, June 6th

8:30-9:30 Breakfast at the hotel

10:00-12:30 Visit introductory discussion with Center for Philanthropy
Venue: Society of Planned Parenthood, Palisády 44

12:30 Lunch in nearby restaurant in Tatra Center at Hodžovo nám. 5 min.
walk from the venue

14:30-17:00 Visit Bratislava Community Foundation
Venue: Society of Planned Parenthood, Palisády 44

18:00

(optional) Walking city tour – Bratislava center (is it possible to arrange?) – we have to check.

20:00 Dinner TBD

Accommodation:

Hotel Sorea, 3 stars
Kralovske Udolie 6, Bratislava
+421/2/544 14 442
www.sorea.sk

Thursday, June 7th

- 8:30 Breakfast at the hotel Sorea
- 09:30 Leave Bratislava for Liptovsky Hradok
- 12:30-13:30 Lunch in Hotel Smrek (seat of the CF). Meals should be ordered beforehand.
- 14:30-17:30 Visit to Liptovsky Hradok Community Foundation
- 19:00 Dinner with a possible visit to High Tatra Mountains, 30 minute drive.

Accommodation:

Penzion Horec Liptovský Jan
Jánska Dolina 432
044/528 0800
www.penzion-horec.sk

Friday, June 8th

- 8:30 Breakfast at the hotel.
- 9:30 Leave to Presov
- 12:00 Lunch in Presov
Lunch will be in Pension ELDORADO, which is the place where you will be accommodated. Meals will be ordered beforehand in order to save time. First will be the check-in the rooms, then lunch.
- 13:30-16:00 Visit at Presov Community Foundation
- 16:00-16:30 Coffee break
- 16:30-18:30 Visit debriefing
- Optional Walk in city center
- 19:30 Dinner TBD.

Stay at:

Penzi3n Eldorado
N3bren3n3 3. 1, 080 01 Prešov
tel.: 00 421 (0) 51 7710 814, 7711 359
fax: 00 421 (0) 51 7711 358
www.penzioneldorado.sk

Saturday, June 9th

- 8:30 Breakfast at the hotel.
- 10:00 Coffee and informal debriefing.
- 12:00 Lunch
- 13:00 Leave back for Romania.

Arrive between 17:00-20:00 depending on location.

Alternatively we can leave earlier and have lunch and informal debriefing on the way back.

More information on community foundations

Key criteria to define the work of community foundations

Used by World-Wide Initiative for Grantmaking Support – WINGS in their 2005 Community Foundations Global Report:

Community foundations are grantmaking organizations that:

- seek to improve the quality of life for all people in a defined geographic area;
- are independent from control or influence by other organizations, governments or donors;
- are governed by a board of citizens broadly reflective of the communities they serve;
- make grants to other nonprofit groups to address a wide variety of emerging and changing needs in the community;
- seek to build a permanent resource for the community, most often through the creation of endowed funds from a wide range of donors, including local citizens, corporations, governments, and other foundations and nonprofits;
- provide services to donors to help them achieve their philanthropic goals;
- engage in a broad range of community leadership and partnership activities, serving as catalysts, convenors, collaborators and facilitators to solve problems and develop solutions to important community issues;
- have open and transparent policies and practices concerning all aspects of their operations; and
- are accountable to the community by informing the general public about their purposes, activities, and financial status on a regular basis.