

ERNOP Pre-conference

# Safe Spaces for Philanthropy

June 28<sup>th</sup>, 2023  
Zagreb, Croatia

**PRACTICAL INFORMATION:**

DATE: **June 28<sup>th</sup>, 2023**

TIME: **12.00-17.15**

LOCATION: **Faculty of Forestry and Wood Technology,  
University of Zagreb, Croatia**

IN COLLABORATION WITH:



# Welcome to the ERNOP Safe Spaces for Philanthropy 2023

This event, taking place the day before the ERNOP Research conference, will host and facilitate in-depth exchanges between academia and philanthropy professionals. The event will connect academics with professional philanthropy practitioners, foster learning from academia and practitioners, and create safe spaces where participants address themes that include a high level of trust. Furthermore, we aim that the output of the safe spaces will be looped back into research on related topics and an edited volume of 'Dialogues' that the Journal of Philanthropy and Marketing will publish.

What are 'Safe Spaces'? Safe spaces are intended to be free of bias, conflict, criticism, or potentially threatening actions, ideas, or conversations where people can speak freely, and are being treated with openness and respect, without losing individual integrity. Universities are, by definition, places that should function as safe spaces and integrating them into ERNOP brings a valuable format part of our association and provide a mean to deepen our understanding of the topic we all care about: philanthropy. By collaborating with Philanthropy Europe Association (Philea), we aim to make these Safe Spaces relevant for all working in, with and for philanthropy in Europe. We are grateful for their assistance in developing the format and kick-starting the conversations by hosting the icebreaker.

This initiative will create new partnerships between academics and professionals working in and for philanthropy by creating safe spaces for philanthropy. For practitioners, it will create an opportunity for peer learning and exchange on topics essential to philanthropic organisations' functioning but often create friction and frustration. Also, practitioners are provided with academic reflections on the topics on the table – it gives them a way to better understand the processes and possibilities to overcome these frictions, stay on top of the most recent research, and connect their daily practice and strategic thinking with research evidence. For academics, it provides an opportunity to engage in an in-depth conversation on important issues with philanthropy professionals and integrate their feedback into their work. The discussions will provide a platform to share knowledge and raise new avenues for innovative research and collaborations.

Trust is essential for Safe Spaces: All joining this event have formally agreed on the Chatham House Rule: participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed.  
I wish you an inspirational afternoon and lasting relationships.

**Barry Hoolwerf**  
*ERNOP Executive Director*



# Speakers bio's

## Chairwoman

**Rita Kottasz** is Associate Professor of Marketing within the Department of Strategy, Marketing and Innovation at Kingston University, London. She is Editor-in-Chief of the Journal of Philanthropy and Marketing (previously: International Journal of Nonprofit and Voluntary Sector Marketing). Her main research interests lie in the areas of arts and non-profit marketing, notably issues to do with fundraising, donor psychology and cultural consumption.



## Moderators and panellists

**Tobias Jung** is the director and founder of the Centre for the Study of Philanthropy & Public Good, Scotland's first research centre dedicated to the growing field of philanthropy studies. Alongside exploring philanthropy's different expressions and traditions, his research focuses particularly on the nature and roles of philanthropic foundations and trusts. He is the President of the European Research Network on Philanthropy (ERNOP).



**Delphine Moralis** is the Chief Executive Officer at Philea and is responsible for the organisation's overall functioning, overseeing the secretariat's strategic direction, and playing the lead role in liaising with Philea's President, boards and committees. Before joining Philea, Delphine was Secretary General of Terre des Hommes International Federation, Secretary General of Missing Children Europe.



**Olga Torasov** leads Rockefeller Philanthropy Advisors' thought leadership efforts, developing original research, publications, and internal and external programs to advance philanthropic growth and innovation, and accelerate philanthropy in pursuit of a just world. In this capacity, Olga also leads hallmark programs, including the Theory of the Foundation and Strategic Time Horizons initiatives.



**Reinhard Millner** is a senior researcher and lecturer at WU Vienna (Vienna University of Economics and Business), and co-founder and head of the WU Social Entrepreneurship Center. Reinhard was a member of the GECES subgroup on social impact measurement, a group of experts developing a methodology for the European Commission to measure the socio-economic benefits created by social enterprises.



**Kate Sullivan** works as the Monitoring, Evaluation and Learning Manager with the corporate foundation of Generali Group, overseeing the impact measurement strategy of the Foundation to guide its work. The Foundation fits into the Group's sustainability strategy and as such contributes to measuring corporate social innovations. Previously she worked as the Research & Evaluation Director and similar roles of local NGO, INGOs and UN Agencies.



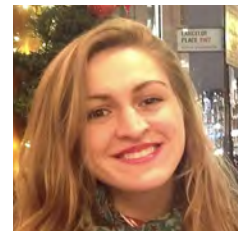
**Laetitia Gill** is an Executive Education Associate at the Centre for Philanthropy (University of Geneva), researching diversity in philanthropic governance. She is co-author of the first report in Switzerland on Diversity in Swiss Foundation Boards (2022). Formerly the Executive Director of the University of Geneva's Centre for Philanthropy (2017-2022), she co-defined and implemented the strategy of this unique interdisciplinary academic centre in Europe.



**Maja Spanu** is Head of Research and International Affairs at Fondation de France. She directs its research hub and manages European and international projects and partnerships. Before joining the foundation, Maja was a research fellow and lecturer at the University of Cambridge. She holds a PhD in Political Science from the European University Institute.



**Janis Petzinger** recently finished her PhD on Relational Philanthropy within UK-based foundations, Janis remains in the Centre for the Study of Philanthropy and Public Good (CSPPG) for a postdoctoral research fellowship. Her research interests include knowledge mobilisation within grantmaking, theories of pragmatism, foundations and trusts, and democracy in philanthropy.



**Dennis Arends** is a Senior Analyst for the Effective Philanthropy Group at Porticus. Based in Amsterdam, providing strategic advice on Strategy, Monitoring, Evaluation and Learning. Also, leading a working group on meaningful participation to make Porticus' philanthropic practices more participatory and inclusive. His experience includes child and human rights, multidimensional poverty, public policy, and education in displacement and migration.



**Theo Schuyt** is a professor of philanthropic studies at VU University Amsterdam. In September 2007, he founded the European Research Network on Philanthropy (ERNOP), functioning as president between 2008- 2021. He chaired the EC – DG R&I Expert group “Foundations, Venture Philanthropy and Social Investments” in 2017-2018. From 2014- 2018 he was also an endowed professor “Philanthropy and Social Innovation” at Maastricht University.



**Volker Then** is the first Chief Executive Officer and Member of the Executive Board, of Fondazione AIS – Advancing Impact and Sustainability, Bologna, created as a new foundation at the beginning of 2022. He served in an entrepreneurial role as the Founding Executive Director of the Centre for Social Investment, Heidelberg University, in 2006 and held that position until 2011.



**Hanna Surmatz** has been the Legal Counsel for foundation law at the European Foundation Centre AISBL (EFC) in Brussels since May 2004. Her main responsibilities include monitoring and mapping/analysis of relevant national and European developments that affect foundations' operating environment; coordination of benchmarking exercises; and facilitating information exchange on foundation law matters through publications and events.



**Georg von Schnurbein** is a full professor at the Faculty of Economics and founding director of the Center for Philanthropy Studies (CEPS) at the University of Basel, Switzerland. His research focuses on nonprofit governance, the financial health of nonprofits, and impact assessment.



**Sufina Ahmad** is the Director of John Ellerman Foundation, a UK-based endowed grantmaker distributing circa £5.8m annually in the arts, social action and environment. In 2022, she finished an Executive MBA with a specialism in strategic leadership at Warwick Business School, with her dissertation exploring what leadership qualities and skills today's philanthropic leaders need.



# Dialogues

*The Journal of Philanthropy and Marketing* will publish a special issue of 5 open access 'Dialogue Papers' that include showcases of forward-thinking 'central pillar' articles and reflections from the practitioners. The 'Dialogue Papers' will be written by academics and practitioners that moderate a safe space. An editorial committee of representatives from ERNOP, Philea and JPM will facilitate the publication process.

The primary aim of the *Dialogues* special issues is to stimulate discussion and debate around a trending theme pertinent (primarily) to the third sector and philanthropy-based activities. The overarching aspiration is to revolutionise current thinking and praxis within the fields of philanthropy to help develop philanthropic practice, set an agenda for future avenues of research, and publish ideas through a unique format of open peer commentary.

The 'ERNOP Safe Spaces for Philanthropy' *Dialogues* special issue will showcase five forward-thinking 'central pillar' articles related to impact, diversity, inclusion, empowerment, advocacy and leadership in philanthropy and , alongside this, present a dialogue around these themes contributed by academics, practitioners and/or policymakers.

*Dialogues* aim to stimulate discussion around trending themes within the discipline of philanthropy through 'central pillar' articles and 'commentaries'. Central pillar articles can have practice-based, philosophical, methodological, or pedagogic foundations and will be written primarily by experts with academic backgrounds.

In turn, the respondents to the central pillar article (commentators) will (respectfully) offer their critical reflections, highlighting lines of agreement, outlining points of discord, and diagnosing potential means to reconcile any divergent views. Commentaries can be written by anyone with expertise related to a specific theme. Commentaries will be written in the first place by the participants of the ERNOP Safe Spaces (under Chatnam House rules) but can also be written by others.

# Program

**12.00-13.00**    **Registration and lunch**

**13.00-13.05**    **Welcome by Barry Hoolwerf, ERNOP Executive Director**

**13.05-13.45**    **Who's afraid of?**

This panel of key representatives from academia, philanthropy and philanthropy advisory will address opportunities and hurdles for effective collaboration (Tobias Jung (ERNOP President), Delphine Moralis (Philea Chief Executive), Olga Torasov (Senior Director, Inquiry and Insights, Rockefeller Philanthropy Advisors), *moderated by* Rita Kottasz (Journal of Philanthropy and Marketing).

**13.45-14.15**    **Break-out groups**

Ice Breakers organised by Sevda Kilicalp (Philea)

**14.15-15.45**    **Safe spaces**

In dept exchanges between academia and practice

Every session will start with an introduction on the related topic – what do we know? How does this apply to philanthropy? Moderators will share (im)possibilities and achievements in dealing with the topic, struggles and pitfalls. Together they will invite participants to share their experiences and possible ways to overcome challenges. Academic contributions and moderators come from ERNOP members, and contributions from practitioners from representatives of the broad spectrum of philanthropy.

## Safe Spaces

### ***Impact – (im)possibilities, managing internal and external expectations***

*Moderated by* Reinhard Millner (WU Vienna) with Kate Sullivan (Generali Foundation)

Impact is on the agenda for years but still feeds debates among academics and puzzles many working in philanthropy. Discussions about (lack of) measurement tools and implications for (strategic) decision-making and from theories of change to unintended effects and attribution of implemented projects often lead to frustration and frozen organisations. What really matters in impact measurement? Can we move beyond the 'definition' and engage in trust-based approaches and connect evidence to strategy?

## Diversity & Inclusion

*Moderated by* Laetitia Gill (Geneva Centre for Philanthropy) with Maja Spanu (Fondation de France)

Considering the richness of all its forms, there is perhaps no societal sector that should celebrate diversity. Inconveniently, however, many philanthropic organisations still are homogeneous. Let us name it – white, male and particularly from an elitist and secular background. What does this imply for the target groups philanthropy aims to serve? And for the functioning of the organisation itself? Or should philanthropy not be losing itself in this sensitive issue?



## Engaging with stakeholders and empowering communities

*Moderated by* Janis Petzinger (University of St Andrews), Tobias Jung (University of St Andrews) and Dennis Arends (Porticus)

Given the size of philanthropy, it seems obvious to collaborate with other organisations to be effective as possible, pool resources, have a stronger voice and learn. Perhaps even more importantly, people and organisations that work directly with the target audience know best about their needs and effective interventions. And what about the final beneficiaries themselves? Yet too often, collaborations do not move beyond ad hoc informal relationships and project-based cooperation. What conditions are required for truly integrated collaboration to achieve a more significant impact? To what extent can communities of practice be developed, sustained and empowered? Or should we also stick to a top-down approach?

## Transparency, accountability and advocacy

*Moderated by* Theo Schuyt (VU Amsterdam) with Volker Then (Fondazione AIS) and Hanna Surmatz (Philea)

For a long time, foundations in Europe have been working in relative silence. However, external and internal developments make philanthropy step up a stage and have the spotlights on. Meanwhile, the operating space for (international) philanthropy seems constantly under review. Does philanthropy have to worry about these developments, and can something be done? Is there a need for philanthropy to become involved in philanthropy advocacy? What lessons can be learned from becoming more active in policy-making? Or should philanthropy not be involved in politics as this will counter back?

## Philanthropic and voluntary leadership

*Moderated by* Georg von Schnurbein (University of Basel) with Sufina Ahmad (John Ellerman Foundation)

Values drive our behaviour. Within philanthropic organisations, it would make sense that leaders' values resemble the organisation's driving values. Or are leaders within these organisations no different than their commercial or public counterparts? What are the values of leaders and what would be the use of these values for management of staff? Does it help or provide hindrance? And what role for board members?

## 15.45-16.15 Coffee break

## 16.15-17.15 Reflections and Knowledge harvesting by moderators

Based on the conversations in the safe spacious session moderators engage in a conversation with Rita Kottasz on key take aways and learnings with a focus on implications for theory and practice.



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