

# The Bellagio Initiative

Aide-mémoire

December 2011

## Documenting the Bellagio Initiative Summit, 8 – 23 November 2011

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### Background

The Bellagio Initiative was developed by The Rockefeller Foundation, the Institute of Development Studies (IDS) and the Resource Alliance to contribute to the development of a new framework for philanthropic and international development collaboration in pursuit of human wellbeing in the 21st century. It has incorporated a series of consultations spanning most regions of the world, garnered advice and guidance from an international Advisory Council, generated nine commissioned papers on a series of relevant topics, included a 15-day Summit at The Rockefeller Foundation's Bellagio Center, in Italy, and involved more than a thousand individuals across the world through social media. The aim of this aide-mémoire is to capture key lessons learned and to maintain the momentum and commitment from those individuals who have brought such a wealth of knowledge and expertise to this process throughout 2011.

### Key messages

The Bellagio Initiative Summit generated key messages for institutions and individuals working within, or between, the sectors of development and philanthropy, as well as those wishing to engage in these sectors in the future. While a more comprehensive report will be produced which will give more detailed analysis of the key insights and action points from the entire Bellagio Initiative process, the preliminary conclusions identified from the Summit by the three organising institutions are as follows:

1. The paradigms that have dominated international development assistance and philanthropic effort are currently being challenged or are discredited, but it is not yet clear what new ideas and approaches will take their place. This provides a **moment of great opportunity for innovating** based on a new combination of actors and approaches.
2. We acknowledged the lack of sufficient understanding of comparative advantages and complementarities between different types of actors, and examined **an ecosystem approach that builds on promising practices** underway in many places across the world. Discussion reflected on the possible complementary roles that different development and philanthropic actors can play and recognised the need to be more conscious of the distinctive contribution of these different roles. These different roles include: convening, exploring, listening, piloting, incubating, catalysing, investing patient capital, investing risk capital, leveraging, scaling, empowering, and incorporating feedback, research, advocacy and learning.
3. There was **strong support for a more people-centred** approach to development efforts. The discussion repeatedly returned to the need to understand the power structures that systematically inhibit a people-centred approach and to the place of ideas around rights and justice in any approach. This reflected a more general theme throughout the Summit that new approaches need to be more explicit about the values on which they are based and that the value basis for international development and philanthropic effort needs to be more consistently applied. In seeking to be more people centred the discussion highlighted the critical importance of more effectively engaging with the role of youth and women in development. Ironically, although philanthropy is people focused from its initiation to purpose, current discussions on these topics are often absent in philanthropies.

4. Questions regarding **the aims of international development and philanthropic effort** arose throughout the Summit. Participants debated the merits and obstacles to using a concept of human wellbeing as a guide in addition to more traditional income-focused measures of development. There was some support for this move, but it was clear that much more work was required to clarify the way the concept could be used and what data could be generated on less tangible dimensions such as voice, dignity and justice.
5. We must build or improve upon shared platforms for **collecting, analysing and acting on data**. Ideally this would involve everyone from the largest development agencies, such as The World Bank and the UN system, to individual philanthropists.
6. Issues of **accountability and transparency** were repeatedly raised in discussion and were highlighted as essential components in any new way forward. These were seen as essential for reconnecting development and philanthropic effort to the people it is intended to benefit.
7. **Financial, social and technological innovations** were examined and appreciated, and this appeared to be a particularly fruitful area for shared learning and action. We explored ways to more effectively find, support and scale innovations that support human wellbeing, with an eye to a future action agenda. We examined community-based methods, prizes and matchmaking methods. At the same time, we must not overlook what is not new and has proven to work well and continue supporting those efforts.
8. **Risk** was a theme running throughout the Summit. Although many participants acknowledged a common assumption that the philanthropic sector can take risks where others cannot (because of endowments and independence), the sector is often as risk averse as others. Balancing a calculus of risk versus opportunities, assessing risk at the strategy and portfolio level rather than at the individual project level, and creating cultures where failures are accepted and seen as sources of learning were seen as possible game-changers in how the philanthropic sector can draw on this potential comparative advantage.
9. The theme of **trust** arose again and again. We discussed the need for better and more reciprocal feedback mechanisms, longer-term and institutional funding, safe spaces for reviewing performance and admitting failures, challenging assumptions and stereotypes, and many other ideas to build trust between different actors. We noted how difficult it is to rebuild trust once it is lost. We noted the great difficulty and even peril that many grantees and development actors face in their societies. And we agreed that there are no substitutes for real relationships that are built on courtesy, respect and getting to know one another on a face-to-face basis.
10. We don't always find the **right combination of actors and social forces**. Authentic, competent local leadership is key – as are capable institutions. And entrepreneurs are often bypassed by development efforts altogether. Providing the appropriate amount of sustained support over time is an important aspect of this.
11. Much of the discussion at the Summit focused on the issue of **resources**; of how to mobilise new resources and make better use of existing resources for philanthropic and development effort to have better effect in promoting human wellbeing. People and their talent, skills, networks, voice and communities were all seen as being equally important for ensuring the effectiveness of both public and private money. Crucially, we agreed that we must not continue to just discuss community voice and action, but rather must act on it. There was a sense that this is where a paradigm shift must originate. New institutional mechanisms for resource mobilisation and new information and communication technologies were discussed as areas of innovation to be explored. The group recognised the importance of funding social movement organisations in addition to more traditional individual institutions.
12. Awareness of the political nature of development, the unintended consequences of giving, and the importance of reciprocal relationships between givers and receivers were threaded throughout the discussions. **Advocacy** is something we should not fear – but should support responsibly.

## Actionable commitments emerging

The Bellagio Initiative Summit also generated agreed and potential commitments for action. These include:

1. Creating a **centre of excellence** that is a training centre and repository for philanthropic organisations, covering topics such as the legal environment, taxation, advocacy, governance and collaboration between philanthropy and development.
2. Convening **working groups for new philanthropists** on specific topics raised in the Summit, including sharing due diligence, a guidelines for funders and NGOs in building partnerships, and governance and management tools for new country-level non-profit organisations.
3. Providing **workshops on philanthropic infrastructure**, development priorities and collaboration for high-net worth philanthropists from Asia and Africa.
4. Developing **supportive peer networks** of high-net worth philanthropists in countries where they do not yet exist.
5. Convening a follow-on event from a **civil society organisations (CSO)** perspective, building on the development and philanthropy focus of the Summit.
6. Convening a follow-on event hosted by a major international development organisation to deepen the Bellagio Initiative focus on the role of development organisations within a **complex ecosystem of actors**.
7. Forming a time-bound Project Team to develop and implement a **research project on power/ideology** in the evolving system of actors.
8. Exploring **people-centred innovation value chains**, starting with existing work on innovation value chains to determine if any are relevant for wellbeing and development; and if people-centred innovation value chains do not exist, writing a brief with recommendations on how a funder could launch a research project on this theme.
9. Conducting background research and scoping for a **Volunteer Impact Assessment** to analyse the return on investment and long-term impact of volunteering in development and CSO, for organisations giving their employees compensated time off, receiving organisations investing time and resources in hosting volunteers, and the volunteer.
10. Supporting expansion and greater quality of **philanthropic endeavours in China** through writing about the Bellagio Initiative experience for a Chinese audience (in Chinese) and potentially hosting a Bellagio Initiative Summit for China-based philanthropy.
11. A research project on how philanthropic, development and CSO can more effectively use **evaluation results** in their communications strategies.
12. **Expanding ideas** such as Ipaidabrike.com or publishing school and clinic budgets on site, and developing applications that can be used on mobile phones.
13. Developing tools for philanthropies to better understand their own **risk tolerance** and to construct portfolios of grants and projects that reflect a mix of risk (rather than gravitating toward the lowest level of risk for all projects).
14. **Developing case studies** for combining local philanthropic giving with international philanthropy, overseas development aid and national level social spending to create financial sustainability for projects.
15. Developing formal recommendations for how foundations can use their convening power and external consultants to **better engage communities** in the early definition of problems and mapping of systems of actors (rather than only engaging communities after solutions have been drafted).

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## **Towards a Framework for Action on wellbeing**

Finally, the Bellagio Initiative Summit outlined principles and steps toward a new framework which the organisers believe will help institutions and individuals in the fields of development and philanthropy more effectively promote the wellbeing of people around the world. This framework will be included in the final report on the Bellagio Initiative.

## **Conclusion**

The Bellagio Initiative Summit organisers realise that there were some gaps in themes and participants, most notably insufficient attention to questions of the environment and the people–nature nexus. And though our discussions were robust and deep, we surfaced as many questions as we resolved. Nevertheless, we believe that these messages, commitments and outline of a framework will make a distinct contribution to the fields of philanthropy and development in the coming years.

*12 December 2011*



The Future of  
Philanthropy and  
Development in the  
Pursuit of Human  
Wellbeing

Credits  
Bellagio Aide-mémoire,  
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publication, visit:  
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The Bellagio Initiative is a series of global consultations to produce a new framework for philanthropic and international development collaboration in pursuit of human wellbeing in the 21st century. The project is led by the Institute of Development Studies (IDS), the Resource Alliance and the Rockefeller Foundation.

