PEXcommunity Evaluation: outcomes and next steps
Our proposal based on the essence of the evaluation outcomes

Purpose of PEX

*How do we practise new paradigms in philanthropy?*

PEX is a courageous, emergent and non-hierarchical space of people in philanthropy infrastructure who are seeding new ways of organising, learning and collaborating to inspire, challenge and transform philanthropy. PEX is where leadership comes through ideas and personal embodiment of change.

Our goals are 1) to connect philanthropy infrastructure practitioners around a shared agenda based on trusted relationships 2) to provide diverse perspectives and opportunities for personal and professional growth and 3) to foster courageous conversations and experimentation.

Audience

Individuals working in philanthropy infrastructure, representing national associations, funders networks, grantees, philanthropy advisors, impact alliances, giving platforms and communities of practice in the philanthropy ecosystem. We bring together regional, thematic, national, European and global organisations that advance the agenda of the European philanthropy ecosystem.

Values

Human-to-human, caring, inclusive, non-competitive, non-conventional, courageous, experimental, shared ownership

Why PEX

- Environment of chosen colleagues
- Being part of a larger team and utilising peer pressure
- Breaking the daily routine and experimenting in safe environment
- Creating multiplier effect
- Embracing big-picture change and anticipating the future
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Background

Jointly co-created at the PEXforum 2020 in Madrid, PEX is a community of 350 philanthropy infrastructure professionals representing over 70 philanthropy networks, among them thematic, regional, national, European and global organisations. Since its emergence in 2020, PEX has contributed to a more dynamic and action-oriented philanthropy infrastructure through a number of initiatives such as incubating the European philanthropy climate movement, the European Philanthropy Climate Coalition or hosting the flagship “What if? Reimagining Philanthropy” debates.

During the three-year journey of its existence, the community had to undergo change in the formats of exchange, as well as the transition phase of Philea, the host organisation. The latest 2022 PEXforum became a pivotal moment to observe the emerging need of the community to revise the common goals and opportunities for further alignment.

In response, Philea partnered with the Istanbul-based purpose-driven consultancy Heart Mind Design (HMD) to look into the current state of play and identify the unique value that PEX creates for its participants and the philanthropy sector. The process included an analysis of PEX’s past activities, examining their outcomes and impacts on various stakeholders. Additionally, stakeholder interviews, a focus group and a survey were conducted with key stakeholders to gather their perspectives and experiences with PEX.

This project is a step towards building the common purpose and roadmap by PEXcommunity jointly at the next PEXforum in Rome in January 2024.

This presentation consists of two parts
- The first part summarises the key outcomes
- The second part provides the full version of the evaluation results prepared by HMD

Purpose of the Project
Identify PEXcommunity’s unique value proposition and provide actionable insights to revise the purpose, vision and a roadmap of the community.

Project Goals
- Evaluating the PEXcommunity for its results, engagement, and vitality.
- Identifying the unique added value of PEXcommunity to its members.
- Generating recommendations on the sustainability of the community and identifying blind spots and new opportunities.

Process
Four Workstreams: Kick-off & Research Design, Insight Research, Analysis & Synthesis Reporting
Kick-off and research download sessions with Philea team and PEX Working Group Co-leads
Survey – 38 respondents
Focus Group – 6 community members
Interviews with 11 community members

Deliverables
Value Proposition Canvas
Current State Analysis & Insights Report
Key Findings and Strategic Recommendations developed by HMD

1. PEXcommunity is strong in delivering professional, personal, and organisational benefits, while fostering trust-based and meaningful relationships. The design of the community should leverage and build upon these unique strengths. Within the community, 68% of participants prioritise 'exposure to diverse perspectives and ideas' and 'opportunities for learning and growth' as their top goals. Therefore, it is recommended for PEX to focus on nurturing this unique space where individuals can develop personally and professionally through meaningful connections, new perspectives, and insights.

2. PEX is a peer-to-peer community that aligns around the need for change in the philanthropy sector. It is important to note that PEX does not aim to be a representative sample of the philanthropy sector. This presents significant opportunities for PEX to deliver value. By bringing together practitioners who unite around the urgency of change and by fostering courageous conversations, personal relationships, and experimentation, participants can drive change within their own contexts, contributing to the advancement of the philanthropy sector. It is recommended for PEX to further investigate the concept of the 'change-maker community' as it promises a strong foundation to foster shared belonging.
PEXcommunity derives its value from being an *alternative space* where new approaches emerge through new connections and insights. By staying true to its core values and principles, PEX can continue to attract individuals who seek a different approach to philanthropy and provide them with a platform. PEX will maintain its relevance as long as it continues to uphold its position as an alternative space and keep its distance to the current paradigms of philanthropy. To differentiate itself from other spaces and fully realise its potential as an alternative space, it is recommended for PEX to act on the areas for improvement listed below:

- Encourage PEX participants to leave the ‘problem solver’ mode behind and switch to ‘explorer’ mode.
- Define diversity for the community and find ways to increase it, so as to encompass a broader range of perspectives, opinions, and experiences.
- Create new ways of working within the community that encourage emergent processes and allow room for ambiguity.
- Put greater focus on embracing agile and experimental ways of working in the community and start formulating its unique methods and tools to enable that.
- Avoid top-down change processes and create more room for change to originate from anywhere within the community.
- Set the tone of voice and create community guidelines for advocacy.
- Encourage courageous conversations by opening more space to express different perspectives and conflicting views and thus ensure richness in insights.
- Create and implement an intentional cross-sector growth strategy.
- Diversify the entry points and make them visible to others to attract a broader range of participants.
- Maintain and nurture the human-to-human, non-competitive, chill, and welcoming nature of the community.
The research revealed that the majority of participants no longer consider establishing a 'common European philanthropy identity' as relevant or attainable for the community. It is recommended to challenge and revise it with new perspectives, such as creating a common vision for European philanthropy, increasing the sense of belonging to European philanthropy, and embracing diversity as the true identity of European philanthropy.

To maintain its unique value as an alternative space, PEX should also differentiate itself from Philea. While Philea and PEX should complement each other, it is important to emphasize that they should not serve as replacements or duplicates of one another. Further investigation and alignment are recommended on the themes listed below:

- The positioning of PEX as an experimental space within the European philanthropy ecosystem, in the broader context of Philea.
- The distinctions between Philea and PEX and the elimination of overlapping initiatives.
- The potential benefits to Philea from hosting this space, which is seen as a reference center for collective thought leadership in the European philanthropy ecosystem.
PEX falls short in certain areas, such as inter-organizational collaborations, time engagement, integration into organizational priorities, and information flow. Interestingly, participants do not prioritize collaboration on joint initiatives or taking action on shared goals as their top priorities. They prefer actions to naturally emerge from their relationships, rather than being forced into them through working groups. PEX is a space where simple and genuine conversations hold significant value, and there is no expectation for participants to come together and co-create disruptive innovations. Therefore, it is recommended for PEX to shift its focus away from pushing collaboration and minimize planning.

The analysis of the value that PEX provides to the philanthropy sector outlines three distinctive values as the starting point: a better understanding of the European philanthropy context, access to curated knowledge and insights, and opportunities for new connections and peer support.

As a result, the value emerges as follows: personal and professional growth through meaningful connections, new perspectives, and insights; a willingness to test and learn in a safe and non-judgmental environment; bringing change into their organizations and national contexts; and contributing to the change of philanthropy in their unique ways.
The experience stories listed below map the future design space of PEXcommunity; it is recommended to further discuss and ideate on these prioritized action areas with the broader community at the PEXforum 2024.

- **UNIQUE FRAMEWORK FOR EXPERIMENTATION**: How might we create a framework for experimentation that is unique to PEXcommunity and inspires philanthropy?

- **HOLDING COURAGEOUS CONVERSATIONS**: How might we create more space for courageous conversations within the community?

- **INCREASING THE STRUCTURAL AGILITY**: How might we increase the structural agility to enable emergence and self-organizing?

- **INCREASING DIVERSITY & CROSS-POLLINATION**: How might we increase cross-pollination through diversity?

- **BUILDING DEEP TRUST**: How might we shift our focus from taking action to building deep trust among PEX participants?

- **DIVERSIFYING WAYS TO ENGAGE AND CONTRIBUTE**: How might we diversify ways to engage and contribute to the PEXcommunity?

- **GETTING A SENSE OF THE BIG PICTURE**: How might we help PEX participants to get the big picture and navigate easily within the community?

- **INCREASING SPONTANEITY**: How might we create new mechanisms to increase spontaneous interactions between participants?

It is recommended to seize the opportunity of PEXforum 2024 to deliver PEX’s value proposition by ensuring everyone feels they are in an "the alternative space" and a part of a change-maker community, by creating an agile and experimental space where ideas emerge from conversations, and minimizing planning.
Philea & PEX

Philea acts as a hosting organisation of PEX. With our mission to enable, encourage and empower the philanthropic community to build a better today and tomorrow, **PEX provides the platform to act collaboratively at the ecosystem level.**

As Philea, we are committed to building a **mutually reinforcing community** among our direct membership, but also with the diverse European philanthropy infrastructure organisations and platforms working for public good. By **combining our vast and diverse constituencies**, different visions, ideas and realities, we can create a shared understanding of the challenges that we face together and opportunities that we can tap into collectively.

As the immediate action point coming out of the **evaluation outcomes** is for us to establish a **clear differentiation between PEX and Philea** in order to maintain PEX's unique positioning for its participants and key stakeholders. The fact that PEX existed prior to Philea, coupled with the emergence of other spaces where national associations can convene, has blurred the distinction between the two.

While Philea and PEX should complement each other, it is important to emphasize that they should not serve as replacements or duplicates of one another. The research outlines the primary differences; however, **further clarification through is recommended.**

**Respondents quotations:**

"It’s not really clear to me what’s the distinct difference between PEX and Philea."
"If everything is the same as the Philea what's the point of having PEX?"
"I know that is Philea [activity] but …"
"It became much bigger; is it PEX or Philea? I wouldn’t know where to stand on that..."
"I feel that there is this overlap. I think Philea more general is closer to this point of the moveable middle but the distinctions don’t stay that sharp indeed on all elements."
The Context & Shared Narrative of PEX:
The Need for Change in Philanthropy

PEXcommunity participants strongly believe that the philanthropic sector is facing significant challenges and opportunities that demand a response. There is a shared recognition that the sector must challenge its own norms and practices to effectively do so. This narrative serves as a motivating and rallying point: Participants are driven by a collective hope that meaningful change can be realized through the power of community.

This shared narrative encompasses the desired change that the community aims to create. It outlines the reasons driving this change and presents the approach taken to bridge the gap between the current state and the envisioned ideal state of the community as perceived by its stakeholders.

In the context of the PEXcommunity, the narrative carries a powerful message centered around the imperative for change in philanthropy.

What is the STORY OF NOW?
"The need for change" in philanthropy

Philanthropy is under more scrutiny [more than ever before and that] is a big challenge.
Philanthropy stays the same.
Philanthropy is a very slow moving world that lack of self awareness. It genuinely believes that companies are going to do what's best for the world once we just show them that it's a good idea.
Climate change, inequalities, the 4th industrial revolution, AI has become prominent thinking within that. All of us in infrastructure bodies are thinking about how to do that differently.

The worst future scenario is that philanthropy generally, it's not the most agile and liberal sector in the world, right? Quite the opposite. It's entrenched in its thinking, it's married to its ideas.
Having experience with European Philanthropy or philanthropy generally, it’s not the most agile and liberal sector in the world.

Philanthropy cannot be passive and support small programs here and there or run its own programs. That is not philanthropy anymore.

There is so much to do and to challenge in philanthropy. I love to be part of that group that challenges it.
One of the things that we should be doing as bigger networks is to understand how are we going to demand transformation on [the current system] and ask for equity to be at the lens of everything that we do, starting on our boards.
What PEX is — What PEX is not, according to HMD

The evaluation team identified the following key learnings that highlight the essence of "what PEX is" and "what it is not". These learnings are essential to reflect upon as they will guide the next stages of ideation on the community’s shared purpose. Below we have offered the guiding questions.

To complement the evaluation findings, it is important to note that a key feature for what PEX is, and what PEX is not, is its target audience. PEX is a space for the practitioners representing philanthropy infrastructure organisations, and philanthropy practitioners with a network and ecosystem mindset and vision. PEX is not a space for philanthropy at large or foundations practitioners, even though the representatives of foundations and civil society organisations might be intentionally invited for specific purposes.

PEXcommunity is a group of change makers in the philanthropy ecosystem; it is not a representative sample of the philanthropy sector.

PEX is a peer-to-peer community that is aligned around the need for change in the philanthropy sector. It is important to note that PEX does not aim to be a representative sample of the philanthropy sector. Instead, its primary focus is to be recognized and fostered as a community of change makers, where individuals can come together to make a difference.

PEXcommunity participants are here to challenge the norms of philanthropy; they are not here to solve the poly-crisis or complex problems.

PEX recognizes the extensive scope of work that lies ahead in the philanthropy sector and embraces the opportunity to be part of a community that actively challenges and questions existing paradigms. However, it doesn’t take the responsibility of solving complex problems. Instead, PEX aims to support and nurture the ecosystem’s capacity to address these challenges.

PEX participants’ main expectation is having good quality connections and interactions; they are not necessarily expecting to create disruptive innovations.

PEX revolves around fostering meaningful connections and high-quality interactions. It is a space where simple and genuine conversations hold significant value; but there is no expectation for participants to come together and co-create disruptive innovations that will drastically change the course of philanthropy.

• Do we bring together the whole spectrum of philanthropy infrastructure, or the “changemakers” of philanthropy infrastructure?
• If it is for the “changemakers” of philanthropy infrastructure, how do we ensure diversity and cross-pollination? If it is for all philanthropy infrastructure, how do we create ownership?
• What constitutes the philanthropy and giving landscape in Europe, who else should be part of PEX?

• Do we come together mainly to challenge the existing norms of philanthropy?
• Does it produce a negative connotation, or does it rather inspire action?
• How do we build a more hopeful narrative?

• Even though disruptive innovation is not necessarily expected, how do we set up the processes that allow for the emergence of new ways of working and collaborating?
• How do we set the tone for the importance of having trust and good quality connections as the necessary foundation for bringing innovation?
PEX Value proposition

The next five slides present the PEX value proposition developed by HMD. The value proposition canvas consists of three levels: the value of PEX for the philanthropy sector, for participants and for community networks. Each value proposition was developed based on the “pains and gains” for PEX community members, which they receive through their engagement with PEX.

**ACTOR LEVEL**

**PARTICIPANT**
(Individuals)

Being part of a change-maker community and contributing to the transformation of European philanthropy.

**COMMUNITY NETWORKS**

Becoming future-ready through connecting new insights, learnings and experiences in the European philanthropy ecosystem.

**OUTPUT LEVEL**

**PHILANTHROPY SECTOR**

Creating an alternative space to challenge the norms of philanthropy and experiment with ways to change it.

- Being part of a larger team
- Utilizing “peer-pressure”
- Experimenting in a safe environment
- Fast-track onboarding
- Opportunity to get inspired
- Chosen colleagues

- Sense & anticipate the future
- Leverage multiplier effect
- Access to the European context
# PEX Pain Relievers & Gain Creators | PEXcommunity Participants (1/2)

The value proposition of a successful community is closely linked to the pains and gains experienced by its participants. Value is created through experiences that create gains and relieve pains. The following analysis lists the key pain points and gains of PEX participants, along with the corresponding pain relievers and gain creators offered by PEXcommunity.

<table>
<thead>
<tr>
<th>What are the pains/gains of a PEXcommunity participant?</th>
<th>How does PEX relieve those pains/create those gains?</th>
<th>Participant Quotations:</th>
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<tr>
<td><strong>BIG ISSUES, SMALL TEAMS</strong></td>
<td><strong>BEING PART OF A LARGER TEAM</strong></td>
<td>“After the earthquake, many people sent messages of solidarity. There were even so many messages saying “we are thinking of you” before the elections. I could see that the people here can understand the hardship we were going through, and it gave me a sense of not being alone.”</td>
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<td>Philanthropy infrastructure organisations have a significant workload to cater to their big and diverse constituencies, yet their teams are often small. As a result, participants may experience feelings of loneliness in a vast and intricate world.</td>
<td>By connecting with other change-makers in the sector, participants develop a sense of camaraderie. This makes the relationships formed in the PEXcommunity unique, as they go beyond mere contacts and foster a sense of being part of a larger team.</td>
<td>“I would love if we do a letter of intent of how we came together and decided to hack our boards and be brave. That would be awesome.”</td>
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<td><strong>HESITANCE TO ACT FIRST</strong></td>
<td><strong>UTILIZING “PEER-PRESSURE”</strong></td>
<td>“We have in a sense our back covered when we want to propose something new. We wanted to have some sort of national commitment in 2019 but it was rejected from our members. When we came back in 2021 saying you know in X other countries are doing this, we should do it as well.”</td>
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<td>In philanthropy, benchmarks are often set by other actors in the sector who are in close proximity. If there is no other actor taking action, a significant amount of persuasion is required to introduce something new or disruptive.</td>
<td>Being aware of the actions taken by other organizations in different national contexts provides an opportunity for participants to persuade their own organizations &amp; funders to take action as well.</td>
<td>“Foundations very much work on peer pressure as well: Others are doing it so why shouldn’t you do it?”</td>
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<td><strong>RESISTANCE TO CHANGE</strong></td>
<td><strong>EXPERIMENTING IN A SAFE ENVIRONMENT</strong></td>
<td>“The main benefit for us that it’s like a laboratory. There are people who are very interesting and, and thoughtful and [it is beneficial to see] what comes out of this process as well as the process itself.”</td>
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<td>The philanthropy sector can often be entrenched in traditional approaches and thinking, which limits the opportunities for philanthropy workers to experiment &amp; learn from trial and error.</td>
<td>Creating a space for safe experimentation and facilitating learning from failures offers valuable opportunities for development. Such opportunities may not be readily available within other collective spaces or one’s own organization.</td>
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# Pain Relievers & Gain Creators | PEXcommunity Participant (2/2)

**NEWCOMER CHALLENGES: LEARN & CONNECT**
Being new to the sector can be a challenging experience. It often requires a significant amount of time and effort to familiarize oneself with the key players, organizations, and establish new connections, especially beyond one's immediate circle.

**CONSUMED BY THE DAILY ROUTINE**
An average day can be filled with meetings and numerous tasks to manage. Within this cycle, there aren’t many moments to encounter new voices and break away from the daily routine to gain a broader perspective.

**NEW CONNECTIONS**
In the nature of philanthropy sector, there are often numerous interactions with individuals from different organizations. However, due to various constraints, it may not always be worthwhile to invest time and energy into developing lasting relationships.

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**FAST-TRACK ONBOARDING**
PEXcommunity provides a platform to understand the major players, trends, and narratives and to make new connections within the European philanthropy ecosystem. Individuals who are new to the sector can fast-track their onboarding process and gain valuable insights into philanthropy.

**BREAKING THE DAILY ROUTINE**
Having the chance to escape the daily routine once in a while and gain inspiration is highly valuable. This opportunity provides exposure to diverse ideas and perspectives, which inherently can make the work more fulfilling.

**CHosen COLLEAGUES**
Spending time in building relationships and connecting with like-minded individuals within the community who share a belief in driving change is a worthwhile investment. What sets these relationships apart from mere connections is the opportunity they provide for thought-partnership.

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### Participant Quotations:

- "I was relatively new to coordinating a network of funders. I had myself been a funder and have been in the funder space, but I was never the one coordinating other donors to do this..."
- "It was a relatively new period for me in the sector, and about a month after starting my job, I suddenly found myself in PEX without knowing what it was. I met new people there and they helped me see the bigger picture."
- "From a personal point of view it is a good space to dig into issues that are of interest that may not be in the exactly the frame of our organizational interest."
- "Sometimes, due to the constant change in country's agenda, we become too much inward-focused and unable to discuss certain topics anymore."
- "The reason why you want to build those relationships before because it adds value to the feedback. [...] You want to know what sort of person they are, you want to have built those informal relationships that you'll know how it's going to act, but also that you'll actually enjoy it."
- "Well, I think if it's based on real deep rooted relationship and social capital, it's great."
PEX Pain Relievers & Gain | Community Networks

What are the pains/gains of organisations represented in PEXcommunity?

**"FUTURE" MYOPIA**
In order to adapt to the major changes and new paradigms, organizations need to invest resources into getting insights about the future. These insights rarely come from within the organization, but it requires collective thinking within a diverse group of people.

**ISOLATED EFFORTS**
Many philanthropic organizations invest resources in creating new knowledge, frameworks and tools that they would love to see spread across the sector and create impact. However, it requires a lot of effort to distribute them.

**LIMITATIONS OF THE NATIONAL/THEMATIC CONTEXT**
Many philanthropic organizations that are focused on their national or thematic context, can lose sight of the broader perspective. Their own context might limit their understanding of emerging developments and trends within the philanthropy sector.

How does PEX relieve those pains/create those gains?

**SENSE & ANTICIPATE THE FUTURE**
Diverse perspectives on the emerging trends & societal shifts empower organizations to anticipate the future of philanthropy. Providing valuable insights and promoting forward-thinking is achieved through diverse representation of actors from various sectors.

**THE MULTIPLIER EFFECT**
PEXcommunity generate a multiplier effect through the flow of information through the network. This helps philanthropic organizations to advance their agendas or spread their impact.

**ACCESS TO THE EUROPEAN CONTEXT**
Participating in a space that brings various actors together provides an opportunity to get an understanding of the larger picture. This allows employees of philanthropic organizations to better grasp the wider European context and explore new possibilities.

Member Quotations:

“Climate change, inequalities, the 4th industrial revolution, AI has become prominent... All of us in infrastructure bodies are thinking about how to do that differently.”
As a philanthropic sector, we have to be on the lookout for topics, social change movements that we need to adjust that we need to take into consideration to our own work.

“Instead of having [us] to be everywhere. We don’t need to be everywhere. There could be a great multiplier effect because I am engaged in this community and I give something and someone takes it further and kind of it aligns with [our] progressive values. […] I can maybe be present doing something or say something to a person that organize networks there and the impact arrives in their way.”

“Influencing the work of even one PEXcommunity member results in influencing the work of dozens (or more) of funders.”

“Our mission is not about European Philanthropy it is about Philanthropy in the UK so when they participating in European context they have to draw something from that. It doesn’t have to be a concrete initiative but it has to be some type of knowledge that helps them in their daily work.”

“I also wanted to understand what was happening around me in European context.”
How does value emerge in the PEXcommunity?

The analysis of the value that PEX provides to the philanthropy sector reveals three distinctive values as the starting point: a better understanding of the European philanthropy context, access to curated knowledge and insights, and opportunities for new connections and peer support. These create a ripple effect that translates into value for the sector (illustrated as an impact ladder below).

Participants acknowledge the importance of addressing complex problems and poly-crises, however they do not expect PEXcommunity to take the responsibility of solving them. They would rather see PEX as a space that enables the sector to better address those issues.

Creating an alternative space to challenge the norms of philanthropy and experiment ways to change it.

Through convening, PEXcommunity enables:
1. Understanding the European philanthropy context
2. Reaching the curated knowledge & insights
3. Opportunities for new connections & peer-support.

THE IMPACT LADDER

1. Personal and professional growth through meaningful connections, new perspectives and insights.
2. Willingness to test and learn in a safe and non-judgmental environment.
3. Bringing change into the organizational and/or national context.
4. Contributing to the change of philanthropy in Europe.
Future Design Space

Experience Stories

The design space for the PEXcommunity maps future action areas as the foundation for shaping the community's strategic direction and delivering its value.

It is presented in the form of “Experience Stories,” which capture the underlying human needs and the tensions for improvement within a given situation. Experience stories provide a narrative that helps us better envision the desired experience or the problem we aim to address.

These were prioritized by the PEX Working groups co-leads in accordance with stories’ potential contribution to the community goals and urgency, which will be further discussed with the community.