

Alliance

For philanthropy and social investment worldwide

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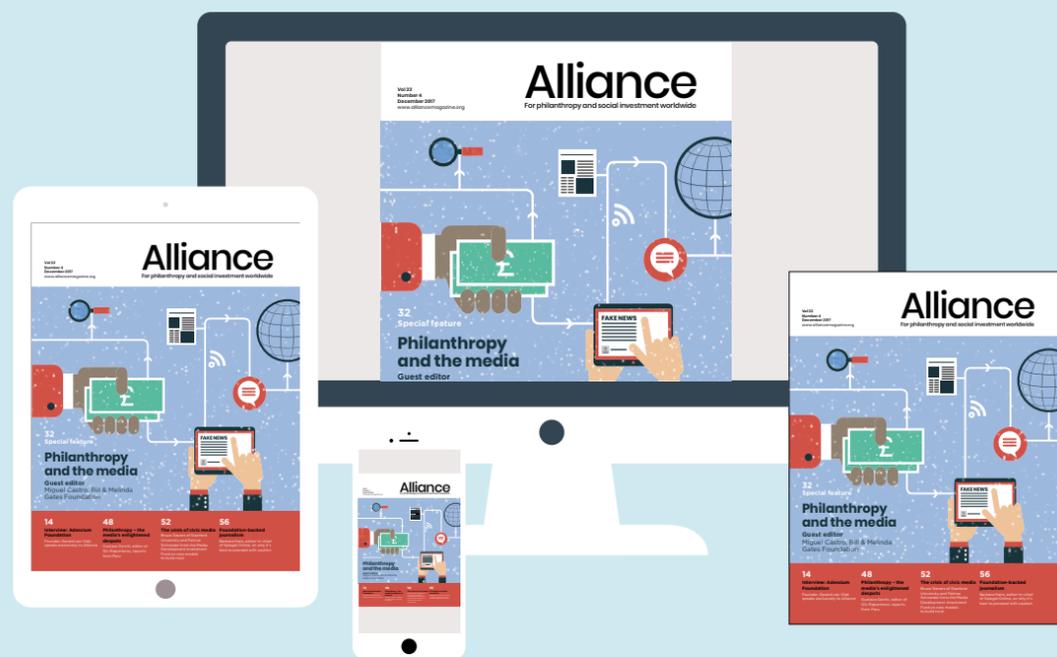
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Editorial Philanthropy's support system under the microscope



Charles Keidan
Editor, *Alliance*.
charles@alliancemagazine.org

A new view of philanthropy infrastructure

‘Infrastructure for philanthropy is rather more like a skeleton than scaffolding. You need it all the time and, unlike scaffolding, you can’t dispense with it,’ commented European Foundation Centre CEO Gerry Salole at a recent meeting of ‘infrastructure funders’. Just as the human body would collapse without a skeleton, so philanthropy can’t function without its support and development infrastructure.

Whether that’s high-quality data and research, bespoke advice and consulting, training, advocacy or representation, there is an essential and vibrant but under-appreciated ecosystem of philanthropy support worldwide. The puzzle for many is how best to provide the sustenance which philanthropy needs to do its job better, while making it financially sustainable.

The special feature in this issue, superbly guest edited by Benjamin Bellego and Maria Chertok, places philanthropy’s infrastructure under the microscope and highlights its potential.

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It offers a new and change-oriented vision for the future development of the field, building on detailed research and engagement over the last few years, some of which is highlighted in the issue. I hope you enjoy reading about the rich diversity of people and organizations at the centre of philanthropy’s central nervous system, the views of leading funders about why infrastructure matters, and the core issues ranging from the impact of tech to the lack of data and the need for more collaboration and resources.

Elsewhere, you can read about a major new fund to affirm the values of democracy and solidarity in Europe. And for something completely different, turn to page 25 to meet Scottish philanthropist, Sir Ian Wood, and read about his foundation’s unique blend of ‘tea philanthropy’ in Africa and ‘car parks philanthropy’ back home.

The diverse issues, developments and trends in contemporary philanthropy deserve greater debate and attention and we, at *Alliance*, are doing our best to provide it.

Enjoy the issue and keep reading!

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A journey to community philanthropy in Zambia
Community philanthropy as a philosophy for community-led development needs to enter the mainstream development debate in Zambia, argue Barbara Nöst and Tarisai Jangara of the Zambia Governance Foundation.

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Spotting the main chance
Interview: Sir Ian Wood
The founder of The Wood Foundation, known for his pioneering 'tea philanthropy' in East Africa, tells *Alliance* editor Charles Keidan how his approach to business and philanthropy employ many of the same principles.

Special feature

32 Philanthropy's developers

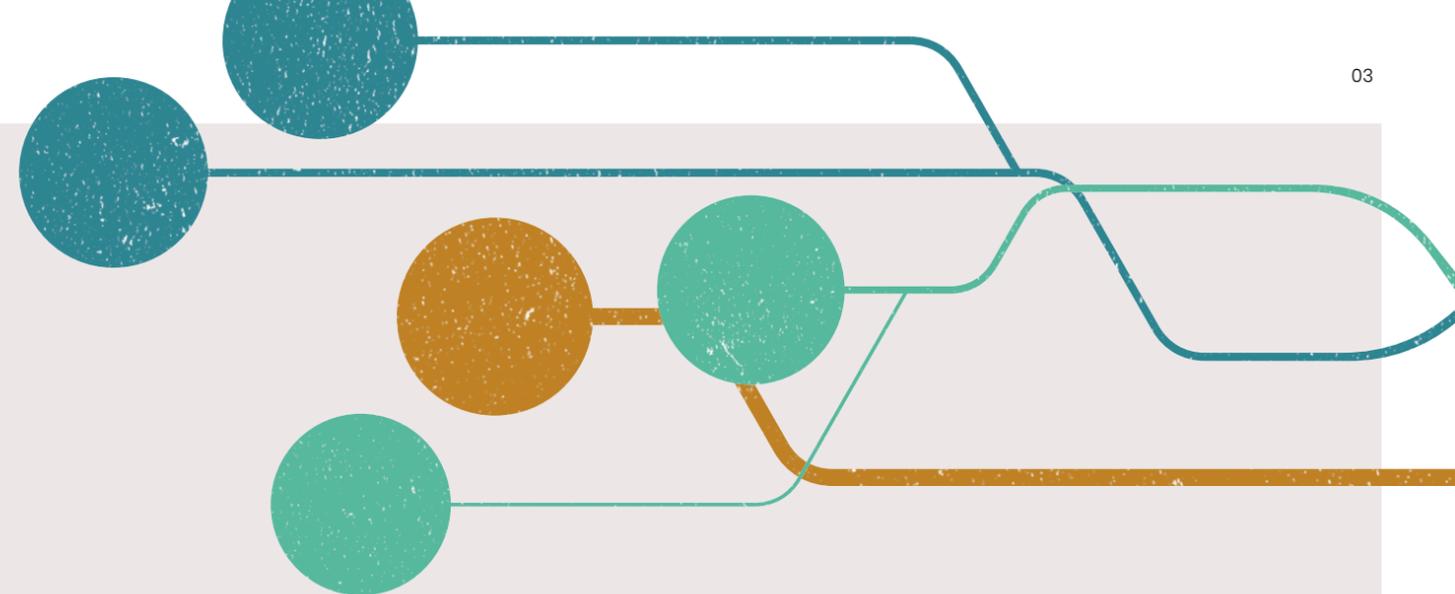
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Time for philanthropy infrastructure to step out of the shadows
As philanthropy grows in importance and extends into new areas of the globe, its support system should be reimagined – for philanthropy's own good, writes Maria Chertok, director of CAF Russia and chair of WINGS.

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Heads together to #LiftUpPhilanthropy
Creating and maintaining a robust infrastructure isn't a problem to be solved. It's a process essential to nurturing and sustaining a strong philanthropic sector and a vibrant civil society, argues Benjamin Bellegy, executive director of WINGS.

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In profile: Types of philanthropy support
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In profile: Pioneers of philanthropy support
Alliance associate editor, Andrew Milner, shines a spotlight on the sometimes less-recognised individuals around the world who have been instrumental to philanthropy's development.



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Systems change is the focus
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Philanthropy support organizations have a vital role in ensuring that disruptive technology leads to change for the better, writes Rhodri Davies, head of policy at the Charities Aid Foundation.

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While the digital space is the infrastructure that we all depend on, it's a major challenge for civil society to secure its freedom of thought and action, writes Lucy Bernholz of Stanford University.

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The philanthropy sector's information infrastructure is wholly unfit for purpose, argues David Bonbright, founder and CEO of Keystone Accountability.

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Keeping the closing space open won't be a solo effort
To challenge growing restrictions on civil society, philanthropy will need to work collaboratively, and infrastructure organizations should be at the fore, notes Hanna Surmatz, enabling environment manager of the European Foundation Centre.

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Community philanthropy in the lead
Community philanthropy should be a star player in sustainable development, writes Jenny Hodgson, executive director of the Global Fund for Community Foundations.

What a difference a year makes...



EFC's review of 2017 coming soon

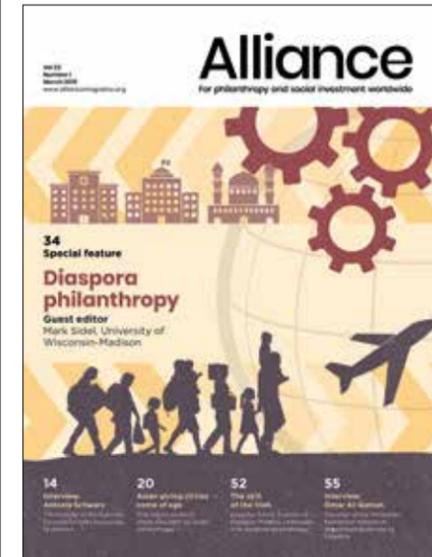
Being part of the EFC is about collaborating with a diverse, dynamic community that is passionate about championing philanthropy.

It's about gaining insights, collaborating with peers and leveraging your policy work at the highest level.

Find out more in the EFC 2017 Annual Review coming soon - and see how you can be part of the journey going forward.

efc.be/about/at-a-glance

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Fitting the image to the spirit

As a philanthropist and philanthropic practitioner from the African American diaspora, I was initially excited to explore your issue on *Diaspora philanthropy* and excited to know that philanthropy by and for communities from myriad diasporas around the world might find an audience among the mainstream philanthropic community. For those of us for whom this work is core to our culture, it is in no way a 'trend' as I've often heard my colleagues refer to it. However, the graphic you chose for the cover of the issue I found to be unfair to the diversity of traditions, backgrounds and experiences of many diaspora communities.

If a picture is worth a thousand words, what exactly was the magazine trying to convey with this graphic? A typical grant recipient? Poverty, instability or transience? Immigrants or refugees? While I am of African descent I am not an immigrant, I was never transient, and I'm grateful I never had to flee conflict. I was born and raised in one country. I am constantly humbled

by, and try to honour, the path of those who have been forced to traverse the world, but that is not every person's reality - from any diaspora. While I understand your aim might have been to highlight the movement of people across borders, that is not our entire existence. Our philanthropy is not about movement, it is literally about love of humankind. And whether someone's movement is due to circumstances, or by choice, they inevitably take community with them.

Finding one photo or graphic to represent every diaspora would be impossible. However, I am confident the magazine could have found a picture that depicted the ancient history of giving, wealth, beauty, intelligence or love of humankind reflected in the values of the religions and/or cultures of the countries and communities explored in this issue. Because no matter what each person's experience might look like, visualizations of philanthropy - caring for, loving, and supporting community - could easily resonate with everyone.

The definition of our work calls us to be more thoughtful, empathetic, compassionate and reflective. And many colleagues will admit that, as a sector, we do not do this well. I know and understand my privilege; I've benefited from resources, opportunities and access, and being an African American woman in no way absolves me of those responsibilities. Whether you find yourself working in philanthropy, or this is your calling, and whether you're within a philanthropic institution, or you're doing this work with your family, we must all push ourselves to do, be and say better. We are obliged to hold our colleagues and the sector accountable, and to constantly explore and reflect on how we enter and occupy spaces in our global society.

Yvonne Moore
Principal philanthropic advisor,
Moore Philanthropy, New York

Letters

Debating #DiasporaPhilanthropy



Philanthropists and philanthropy professionals attended the Alliance Breakfast Club at the Mosaic Rooms in London to debate Alliance's March issue on #DiasporaPhilanthropy.

Main image: Panelists (l-r) Eleanor Harrison, Meheen Rangoonwala and Abu Thorat Shah discuss diaspora philanthropy with Alliance editor, Charles Keidan.

Bottom left: British Asian Trust's Abu Thorat Shah.

Bottom right: Philanthropist Omar Al Qattan, chair of the Qattan Foundation.



ThinkingPhilanthropy
@philanthink
• 23 Apr 2018

Stimulating start to the week. @Alliancemag breakfast on #diasporaphilanthropy – technology, equity, unlearning the modes of western philanthropy, and building trusted links between local & global actors.



Rick Holland
@RickHollandCFRE
• Apr 23

Insight from @OAQattan @QattanFDN "to be identified with your faith is quite a worrying trend" – part of today's @Alliancemag

#diasporaphilanthropy discussion #philanthropy #giving



Richard Hawkes
@R_Hawkes
• Apr 23

Great contribution from my @britishasianst colleague @abhathorat to @Alliancemag breakfast discussion on diaspora philanthropy

#diasporaphilanthropy



Philanthropy for Better Cities Forum

Convened by
The Hong Kong Jockey Club
Charities Trust

20-21.09.2018

Hong Kong Convention and Exhibition Centre

The Philanthropy for Better Cities Forum is the first of its kind in Asia to focus on metropolitan social issues. The second edition in 2018 will provide a platform for 50+ distinguished speakers and 1,000+ philanthropists, social entrepreneurs, thought leaders, policy-makers, academia and NGOs from around the world, especially the Asia-Pacific and Greater China region, to exchange views, facilitate cross-sector collaboration and cultivate long-term partnerships and engagement, all in the hope of creating better cities.



Keynote Speaker Prof. Michael Sandel

Anne T. and Robert M. Bass Professor of Government
Harvard University

"I look forward to exploring the ethical dilemmas with participants at this special Forum with a diverse geographical representation, and to joining some inspiring dialogue with thought leaders, policy-makers and industry practitioners."

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The Americas



Renee Kaplan new CEO at The Philanthropy Workshop



Renee Kaplan has been appointed the new CEO of The Philanthropy Workshop, a donor education and

networking body for the ultra-wealthy. She will lead its San Francisco, New York and London-based staff, as well as a global network of philanthropists.

Kaplan said she is 'incredibly honoured' to assume the role. 'Given the state of complex, urgent global problems we currently face, there is a strategic opportunity for philanthropy to drive and share solutions that work,' she said. 'Working collectively, I believe we can accelerate innovative new programmes to amplify our members' impact all around the world.'

<https://tinyurl.com/Kaplan-CEO>

New partnership to tackle US affordable housing crisis

Nine US foundations, including the Ford Foundation and the Bill and Melinda Gates Foundation, have launched a new partnership – Funds for Housing and Opportunity – to confront the country's affordable housing crisis.

The campaign will encompass organizations from various fields, such as healthcare, civil rights, education and anti-poverty and an initial \$4.9 million in grant money will focus on policy, advocacy and organizing, said Susan Thomas, senior programme officer at Melville Charitable Trust and chair of Funders for Housing and Opportunity. The main recipients will be the Center for Community Change, National Housing Trust and Enterprise Community Partners and the Partnership for Children and Youth. The largest grant, \$2.7 million, will go to the National Low Income Housing Coalition to launch a multi-sector housing campaign.

<https://tinyurl.com/US-collaborative>

Study highlights limits of Chilean foundations

A new study by CEFIS UAI and the Hauser Institute for Civil Society at Harvard University details factors limiting the effectiveness of Chile's foundation sector: level of giving, methods of operation, and governance and transparency.

Filantropia Institucional en Chile says \$83 million was spent on programmes by Chilean foundations in 2015, 0.03 per cent of Chile's GDP. Regarding

modes of operation, only 18 per cent of foundations operate solely by making grants to third sector organizations.

The study also notes a lack of public access to information about foundations. Only 29 per cent publish activity reports on their websites and just 24 per cent provide information on their financial position and programme expenditure.

<https://tinyurl.com/study-Chile>

Europe



OECD report urges foundations to share knowledge



A new report, *Private Philanthropy for Development*, released by the Paris-based Organisation for Economic

Cooperation and Development (OECD) notes that foundations have an important role to play in achieving the Sustainable Development Goals, but sees two major obstacles in the way: the shortage of reliable and publicly available data about philanthropic flows and a limited understanding of foundations' priorities and partnering behaviour.

To combat this, the report encourages foundations to increase the sharing of knowledge with governments and the donor community, as well as using existing platforms, such as the International Aid Transparency Initiative and 360Giving, to make data more accessible.

The report adds that governments should provide a more conducive environment for philanthropy in developing countries, while the donor community could adopt a systematic approach to collaborate with foundations.

<https://tinyurl.com/OECD-philanthropy>

Infrastructure bodies target single philanthropy market

Three of the principal pan-European philanthropy infrastructure bodies have announced a plan to hold a philanthropy 'scrum' in late May to discuss ways to create a single market for philanthropy in Europe. EFC, DAFNE and EVPA convened the meeting to bring together members of their own organizations with EU policymakers and national regulatory authorities. The meeting, due to be held on the eve of EFC's Annual General Assembly in Brussels, will build on findings of a recent study, commissioned by the EFC and DAFNE, which argued that restrictions on foreign funding and inconsistent taxation policy are undermining European philanthropy.

<https://tinyurl.com/single-market-plan>

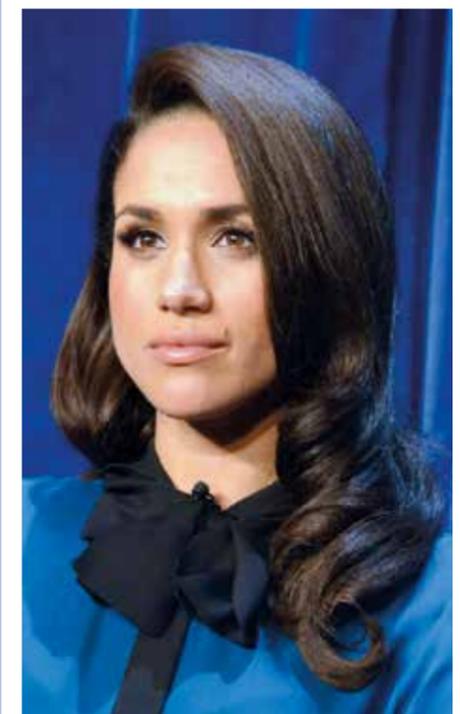
UK's Royal Foundation gears up for new generation philanthropy

Prince Harry's fiancée Meghan Markle was the major focus of interest at what was dubbed the first-ever forum of the UK's Royal Foundation, set up in 2009 to serve as the main vehicle for the philanthropic endeavours of the Duke and Duchess of Cambridge and Prince Harry. As she begins to work with royal charities, Markle referenced the #MeToo and #TimesUp campaigns against sexual violence and told the forum she wanted to 'shine a light on women feeling empowered'.

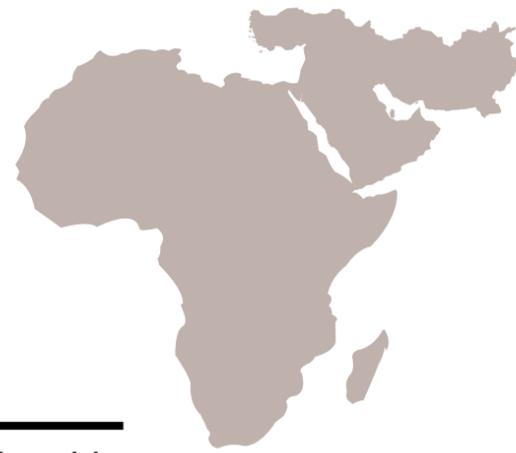
So far, the foundation has addressed a variety of causes, such as the armed forces, conservation, young people and mental health.

Prince William emphasized the foundation was not looking for 'quick wins', but rather a consensual and consultative approach.

<https://tinyurl.com/Royal-Foundation-forum>



Africa and Middle East



Israeli foundation's \$31.6m grant to at-risk youth

The Azrieli Foundation has made a major commitment to at-risk youth with a grant of nearly \$31.6 million. The foundation partnered with Darca Schools – a network of Israel's high schools – with the aim of keeping at-risk youth in school, empowering schools in Israel's geo-social periphery and encouraging equality and opportunity in education.

The Darca network currently serves more than 16,000 students, providing an innovative approach to education. Its partnership with the foundation will enable it to extend its reach to thousands of other young people.

'The Azrieli Foundation has been deeply invested for years in helping the children of the periphery in Israel, especially in preventing junior high school students from dropping out of school and empowering youth with skills to succeed,' Danna Azrieli, the chair of the Azrieli Group and the foundation said. 'We are very excited to have the most successful school network in Israel adopt our programme, embrace it and expand it.'

<https://tinyurl.com/Azrieli-grant>

Meeting in Lusaka heralds Zambian embrace of community philanthropy



Over the past two years, Zambian Governance Foundation (ZGF) has reinvented itself to support community philanthropy, as opposed to its previous focus on civil society organizations and influencing policy processes. An event held in Lusaka in March, entitled 'From Dependency to Ascendancy', reflected this major change of direction.

The event included a diverse group of attendees, such as local non-profit organizations, representatives from communities, regional foundations, government and the private sector. The presence of Jenny Hodgson, the executive director of the Global Fund for Community Foundations (GFCF), was especially significant of ZGF's change of approach since it was apparently triggered by its participation in GFCF's 2016 Global Summit on Community Philanthropy.

GFCF subsequently gave ZGF a grant to carry out a study of local giving patterns among Lusaka's middle class, which provided the first step towards adopting a community philanthropy approach.

<https://tinyurl.com/Zambia-meeting>

Arab philanthropy is moving from charity to development, new report finds

Philanthropy in the Arab region is shifting from a more traditional religious and charitable paradigm to one of secular development, according to a new working paper published in March by the Philanthropy for Social Justice and Peace (PSJP) network.

Drawing on conversations with people involved in promoting, supporting and strengthening philanthropy, the report analyses philanthropic trends in 22 countries across the Middle East and North Africa and also covers various methods of philanthropic giving.

Commentators in the report note social enterprise as a growing force in Arab's philanthropy and the need for a greater focus on human rights.

The paper – *Philanthropy in the Arab Region* – is the third in a series of reports from PSJP and follows previous reports on Indian and Russian philanthropy.

<https://tinyurl.com/charity-to-development>

Asia and the Pacific



Compass for the uncharted waters of Chinese philanthropy

The regulatory burden for Chinese philanthropic and non-profit sectors may be easing, but it is still complex, finds a new report from the International Center for Not-for-profit Law. The China Philanthropy Law Report attempts to navigate some of these complexities, setting out recent developments and analysing regulations governing cross-border giving, the organizational forms and registration of NPOs, and the fiscal laws relating to philanthropy among other questions.

<https://tinyurl.com/China-law-report>

Australia embraces shift to philanthropic funding of media



The relationship between philanthropy and the media in different parts of the world continues to grow, with The Balnaves Foundation's grant of \$300,000 to the Guardian Civic Journalism Trust.

The grant supports the *Guardian Australia's* Civic Journalism Initiative and part of it has secured the appointment of Lorena Allam as *Guardian Australia's* indigenous affairs editor, where she is expected to further indigenous affairs reporting and investigations, strengthen a diversity of voices and expand public discourse on critical issues.

'Now more than ever there's a need to understand that indigenous Australia is made up of many different experiences, viewpoints and voices on the issues that affect us all, whether they are political, cultural, social or historical,' Allam said.

<https://tinyurl.com/Australia-shift-funding>



Hamish Balnaves, general manager of The Balnaves Foundation.

Puja Marwaha receives Olga prize

Puja Marwaha of CRY (pictured second left with her co-finalists) receives the 5th Olga Alexeeva Memorial Prize at the recent WINGS International Meeting for Funders in Barcelona.

<https://tinyurl.com/olga-prize>



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Philanthropy Thinker

A revolution of capital



Clara Miller, president emerita of the Heron Foundation, explains why institutional philanthropy must change.

Analysis

Interview: Philippa Charles, Garfield Weston Foundation



Philippa Charles, director of Britain's second largest foundation, with over £12 billion in assets, makes the case for core funding.

Analysis

Conference Report: Philanthropy infrastructure under the microscope



Alliance editor **Charles Keidan** reports from Barcelona where delegates discussed: 'Why won't foundations pay more for the infrastructure which exists to help them?'



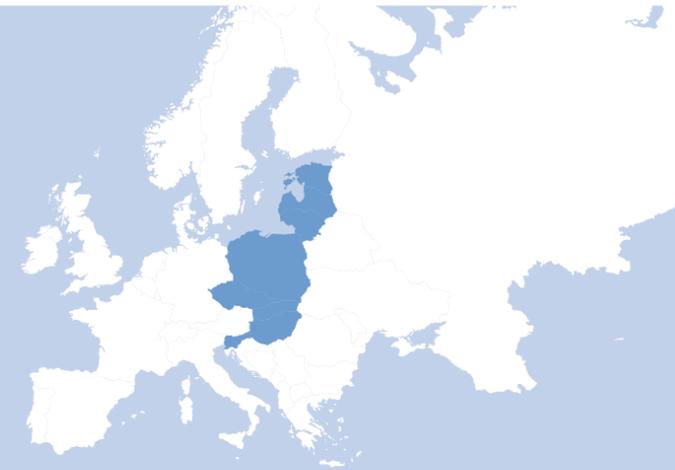
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<http://www.alliancemagazine.org/blog>

Susan Jessop Mama Cash

Lesbian, bisexual and queer activists on the frontline

Anke Patsch Bundesverband Deutscher Stiftungen

For equitable chances and gender diversity - let's change the rules!

Retnaningtyas Dwi Hapsari Filantropi Indonesia

How interfaith philanthropy can minimize violence in the name of religion

Lauren Bradford Foundation Centre

Russian philanthropy's changing landscape

Leigh Pearce Nationwide Foundation

How I dealt with depression while running a foundation

Alliance audio

Should philanthropy be doing better?

Should foundations do more to be - and be seen to be - transparent, trusted and effective?

Alliance editor Charles Keidan hosts a discussion with Paul Ramsbottom of the Wolfson Foundation and Carol Mack of the UK Association of Charitable Foundations.

<https://tinyurl.com/discussion-Alliance>



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A new fund for democracy and solidarity in Europe



Stefan Schaefer is chair of Civitates and head of European Affairs at the King Baudouin Foundation.
 @schaefer.s@kbs-frb.be

A group of 18 foundations have set up a €4 million fund to support civil society and improve the public discourse

Liberal democracies in the European Union have been under stress over the past few years, at both national and regional level. Citizens are insecure about their future, reeling from socio-economic, cultural, generational and technological change, and anxious about the apparent incapacity of European and national governments to solve these problems. It makes them doubt the ability not just of the European Union but also national governments and the democratic system in general, to meet their needs and serve their interests. Among the results are the rise of authoritarian populist

parties, Brexit, a more and more toxic debate around 'otherness', citizens not making their voices heard in an organized way and disengaging from democratic processes. Such challenges are evidence that democracy requires constant investment.

This situation prompted a group of foundations to establish a Fund for Democracy and Solidarity in Europe in 2017. The creation of the fund is both a firm statement by the partner foundations of the values and principles they stand for as individual organizations, and a reaffirmation of the importance of a functioning democratic system in Europe. In other words, it can be seen as a way to put our house in order, considering the fact that Europe is often referred to as a model of democracy.

The fund, which has €4 million committed over the initial three years, will work on two vital aspects of democracy: a healthy environment for civil society and the quality of public discourse in an era of digitization. »



The fund, which has €4 million committed over the initial three years, will work on two vital aspects of democracy: a healthy environment for civil society and the quality of public discourse in an era of digitization.

The fund is backed by:
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The new fund will encourage widening collaboration between CSOs.



The fund stands for values and principles which are central to the European ideal, such as respect for human dignity, freedom, equality, the rule of law and human rights. Throughout the years, philanthropy has contributed to shaping those values.

A healthy environment for civil society

In several EU member states – to differing degrees – civil society’s right to exist is being contested and its space to operate is being reduced. The aim of the fund in this case is to reinforce the capacity of civil society organizations (CSOs) to address the challenges related to their shrinking space, allowing them to operate more efficiently and reaffirm their legitimacy and embeddedness in democratic systems.

By the time this article appears in print, the fund will have a name – Civitates – and will have launched its first call for proposals. Through the fund, we want to foster cross-sectoral and innovative coalitions of CSOs to address the shrinking space in their national context. It encourages CSOs that do not usually work together to collaborate and engage in a collective approach to a common issue. The fund will take a bottom-up approach by imposing very limited constraints on the grantees, allowing them to decide on the activities they deem necessary in their national contexts. Through a two-phase grantmaking process, the fund will dedicate time and resources to coalition building in order to allow the organizations to come together and reflect on the activities to be undertaken. Ultimately, this call for proposals aims at creating more collective action by CSOs to tackle their shrinking space and contribute to the policy debates at the national and EU levels. It will also foster transnational exchanges of best practice between the coalitions through gatherings organised by the fund.

The quality of public discourse

In the second funding strand, the objective is to contribute to building a free public discourse based on facts, independent analysis and plurality of views. Public discourse plays a vital role in democratic societies: it provides collective meaning for societal phenomena and enables the production of input for decision-making processes. While digitization can bring a lot to this process, it also poses



challenges, the extent of which are not yet fully understood. Through this sub-fund, the fund wants to enable citizens and policy-makers to understand the functioning of the digital news and information ecosystem and its impact on their news diet, thus making them aware of potential manipulation. The fund also wants to encourage a move towards the transparency and accountability of technological companies with regard to their role in the aiming of information or misinformation at particular groups of citizens. After consultations with several experts in the field, an intervention plan is currently being elaborated and we hope to issue the first grants of this sub-fund in the second half of 2018.

Hosted by the Network of European Foundations (NEF), the fund has a secretariat based in Brussels which is responsible for its daily operations. It benefits from the cross-fertilization with other pooled funds hosted by NEF. The general strategy of the fund is set by a steering committee, comprised of the fund’s members and the strategies of the sub-funds are defined by dedicated working groups. It should be mentioned that the work accomplished so far in setting up the fund is in great part due to the level of involvement of each member, who have invested not just financial resources but also their expertise in this endeavour.

The fund stands for values and principles which are central to the European ideal, such as respect for human dignity, freedom, equality, the rule of law and human rights. Throughout the years, philanthropy has contributed to shaping those values. It is our duty to express a common and coordinated reaction when we feel that those values are under stress, and to stand in solidarity with those who suffer from this stress. ●

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About the Network: WINGS is a network of more than 100 philanthropy associations, networks, academics and support organizations in 40 countries around the world whose purpose is to strengthen, promote and provide leadership on the development of philanthropy and social investment. Together, WINGS members serve over 100,000 philanthropic entities from all regions.

A journey to community philanthropy in Zambia



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If the old vessel is foundering, don't cling to the wreckage – build a new boat

In 2011, Zambia was classified as a low-middle-income country which had many economic and other implications for the country. Among the most visible implications was the progressive withdrawal of international aid, a trend which has continued

unabated since 2011 despite the fact that more than 60 per cent of the Zambian population lives below the poverty line. Against this backdrop, the establishment of the UN SDG Philanthropy platform in Zambia created some optimism that private and philanthropic sector organizations could be brought on board, and that new actors would bring new

perspectives on how development is conceptualized and operationalized to jointly meet the SDGs. While we consider this

Breaking the dependency syndrome, which is long-rooted in the African culture, has to start at the family level, which in turn will enable the growth of philanthropy in Zambia.

development as extremely positive and timely and while there is much focus on philanthropy *for* community, limited attention is paid to community philanthropy or philanthropy *by* community. We think community philanthropy as a philosophy for community-led development needs to enter the mainstream development debate in Zambia.

Hitting a nerve

Community philanthropy is a new world for us. Our first encounter with it was when our board chairperson, Beatrice Grillo, met the executive director of the Global Fund for Community Foundations (GFCF), Jenny Hodgson, during the international civil society week in Bogotá in May 2016. This led to a visit by Jenny to Zambia in October 2016 and our participation in the first ever Global Summit on Community Philanthropy in Johannesburg in December 2016. The global summit was an eye-opener, greatly boosting our morale and helping us to have a more positive outlook on what development actors can do to counter the challenges presented by a fast-changing aid landscape. We were intrigued by the underlying concepts, the new approaches and the different interpretations of community philanthropy by community foundations across the globe. What also caught our attention was how community philanthropy practitioners and advocates diagnosed the various aspects of traditional development aid structures and funding flows as being inadequate to bring about lasting positive change at community level. The analysis and the frank testimonies of individual civil society leaders and advocates of community philanthropy hit a nerve with us.

We had been feeling increasing uneasiness with the delivery of traditional aid and found ourselves, as a civil society support organization, caught up in something we no longer want to be part of: a system we believe is flawed, where there is a power imbalance between donors and recipients, and inadequate »



Launch of #ShiftThePower Zambia.



Zambia's community strengths are fundamental to the local development process.



Above: Victoria Falls, Zambia.

Left: Barbara Nöst and the ZGF team.

much from the experience of an African community foundation and were most inspired by how KCDF has against all the odds introduced the notion of community endowment funds in the Kenyan context. From our perspective as a local grantmaking and capacity development organization for Zambian civil society organizations (CSOs), KCDF's community endowment fund experience deeply resonated with us. Thus, we saw this construct as an opportunity to transform our grantmaking function and infuse the notion of community endowment building. This enabled community members to have more space to be decision-makers and co-investors in their own development processes. We applied for another GFCF grant to help us establish a community endowment fund, modelled on the KCDF approach and, in early 2018, we started preparing for our interaction with the first community to assess their interest in working with us to jointly establish a community endowment fund.

The potential for sustainable philanthropy

Meanwhile, the findings of the study, *Beyond Giving: A study of local philanthropy in Zambia*, revealed a mixed picture on local giving dynamics and how local giving plays out in practice. Despite the strong family ties that

structures and funding procedures. It stimulated organizational soul-searching and raised the question: what do you do to challenge the system while still benefitting from it?

A multitude of approaches

The summit also gave us an opportunity to learn from the many creative approaches employed by grassroots NGOs and community foundations from various continents. While many community foundations have emerged in different shapes and forms in other continents, we also realized that community foundations in Africa continue to be few and far between. Particularly, one community foundation, the Kenya Community Development Foundation (KCDF), caught our attention because of the similarities to our aspirations towards greater donor sustainability, their approach to community-led development supported by community endowment funds and the separation between the community

foundation and investment arm. Interaction with them reassured us in our quest for organizational transformation as we redefined our role as a foundation in the Zambian context. The emerging debate on community philanthropy in the African region resonated with ZGF's ambition to become more self-sufficient and sustainable not just because of dissatisfaction with traditional development financing, but also because of the underlying principle of acknowledging community assets as an indispensable part of successful local development processes.

We spent much time on self-reflection during the period following the Global Summit and applied for a first GFCF grant to conduct a study on local giving patterns in Zambia, inspired by the LIN Center's study in Vietnam.¹

Community endowment funds

In June 2017, we attended KCDF's 20th anniversary celebrations in Nairobi. We felt we could learn

exist in Zambia, most of the giving actually happens in the church, and the ethical use of donations is considered a key factor in giving. What was also apparent from the study was that organized and networked philanthropy has the potential for growth if families and individuals channel their resources through formal philanthropy. Breaking the dependency syndrome, which is long-rooted in the African culture, has to start at the family level, which in turn will enable the growth of philanthropy in Zambia. Local communities have talent and potential that should be appreciated, thus giving should be done in ways that enable this potential to be realized.

The launch event of the report in March this year did two things. First, it rekindled the debate on the role of community and community philanthropy in bringing about lasting positive change. Second, it was an important opportunity to bring the topic of local philanthropy to the fore in an environment in which civil society actors like us are having to redefine their roles to remain relevant.

A new model to make the old one obsolete

The event attracted representatives from the wider African philanthropy community, including the Kabale Municipal Development Foundation from Uganda, the Kenya Community Development Foundation, Fundação MASC of Mozambique, Tanzania Civil



There was one common denominator which confirmed that we were in the same boat: the realization that African communities have to be the centrepiece of any meaningful and lasting change.

Society Foundation, Uluntu Community Foundation from Zimbabwe, Community Foundation of the Western Region of Zimbabwe, Trust Africa and the African Philanthropy Network. While all of us had our own specific perspectives and experiences and different degrees of alignment with the notion of community philanthropy, there was one common denominator which confirmed that we were in the

same boat: the realization that African communities have to be the centrepiece of any meaningful and lasting change. The event was invigorating in another way, too. Being the lone advocate in an emerging debate can be exhausting. We should not overlook the positive effects such gatherings have on individuals who have been at the forefront of this movement for a long time. The meeting greatly boosted our morale, while making us realize that only a united front can help create an alternative system. In the words of R Buckminster Fuller, 'You never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete'. ●

¹ *Building Community Philanthropy in Vietnam: Understanding the experiences and expectations of donors to the LIN Center for Community Development.*

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The Philanthropy Canvas: Evaluating A Foundation's Operating Model

**Olga Tarasov**

Director of knowledge development,
Rockefeller Philanthropy Advisors

Donzelina Barroso

Director of global philanthropy,
Rockefeller Philanthropy Advisors

As part of an ongoing initiative to help the philanthropic sector more deeply understand the *Theory of the Foundation*, Rockefeller Philanthropy Advisors recently developed an analytical framework to help foundations to engage in self-evaluation and analysis. This Philanthropy Canvas, ideated from the *Business Model Canvas* created by Alexander Osterwalder and Yves Pigneur, is a useful tool for aligning all elements of the model for mission, strategy and impact.

As a visual model, the Philanthropy Canvas invites foundation staff, trustees and other key stakeholders to map out the elements necessary to implement a foundation's strategy in relationship to both its core framework (charter, social compact, and operating capabilities) and to the external environment that it seeks to influence and by which it is in turn influenced.

This framework spurs in-depth thinking on what a foundation is or seeks to be, based on mission and strategy, key activities, resources, relationships (partners and audiences), funding, costs, channels, and beneficiaries. It also accounts for the constraints of resource realities and the state of the world. Understanding how a foundation or program operating model compares to one similarly situated can highlight areas for further analysis and potential change.

The Philanthropy Canvas can also be used to:

- Drive analysis for organizational planning and development.
- Spark discussion of who and what a foundation is among leadership or program teams.
- Evaluate and drive agreement on specific program areas.
- Square ambition with resources, realities and capabilities.
- Drive top-level alignment within a foundation.
- Identify gaps or misalignments, and to develop a shared story.

At the request of participants in our Learning Collaborative, we have developed several operating model types based on certain key characteristics revealed by answers to the various categories in the

Operating Model Types

Campaign Manager

Believes that policy change is a fundamental tool for systemic change, and uses its institutional power to get a policy or solution broadly adopted.

Catalyst

Provides flexible funding to allow new ideas to develop or come to fruition in ways that the foundation does not try to foresee or manage.

Field Builder

Focuses on creating a new set of institutions that will build a vibrant, powerful ecosystem for an issue or movement.

Canvas. While this list is not definitive, many foundations fit into one (or more) of these six types.

As we continue to test our hypothesis with our foundation thought partners, we will explore additional models and considerations. With convenings and research projects planned for the next year and beyond, our learnings will continue to evolve. We hope you join us on and benefit from this journey.

To view the Philanthropy Canvas, get more information on how to identify your operating model type and review other insights gained from the Theory of the Foundation initiative, please visit TheoryoftheFoundation.org.

Background on the Theory of the Foundation

RPA's Theory of the Foundation initiative draws on experience from dozens of foundations to create a framework for introspection on fundamental beliefs about how they operate as organizations. Our aim is to stimulate a discussion about foundations as institutions, beyond programmatic or grantmaking activities, and help foundations more effectively align their purpose and resources for impact.

Talent Agency

Prioritizes betting on individual leaders or key organizations by selecting, strengthening and promoting leading change agents who are closest to the issue.

Think Tank

Applies its expertise to design internally policy or systemic solutions, "market" the approach, and then find implementers for those solutions.

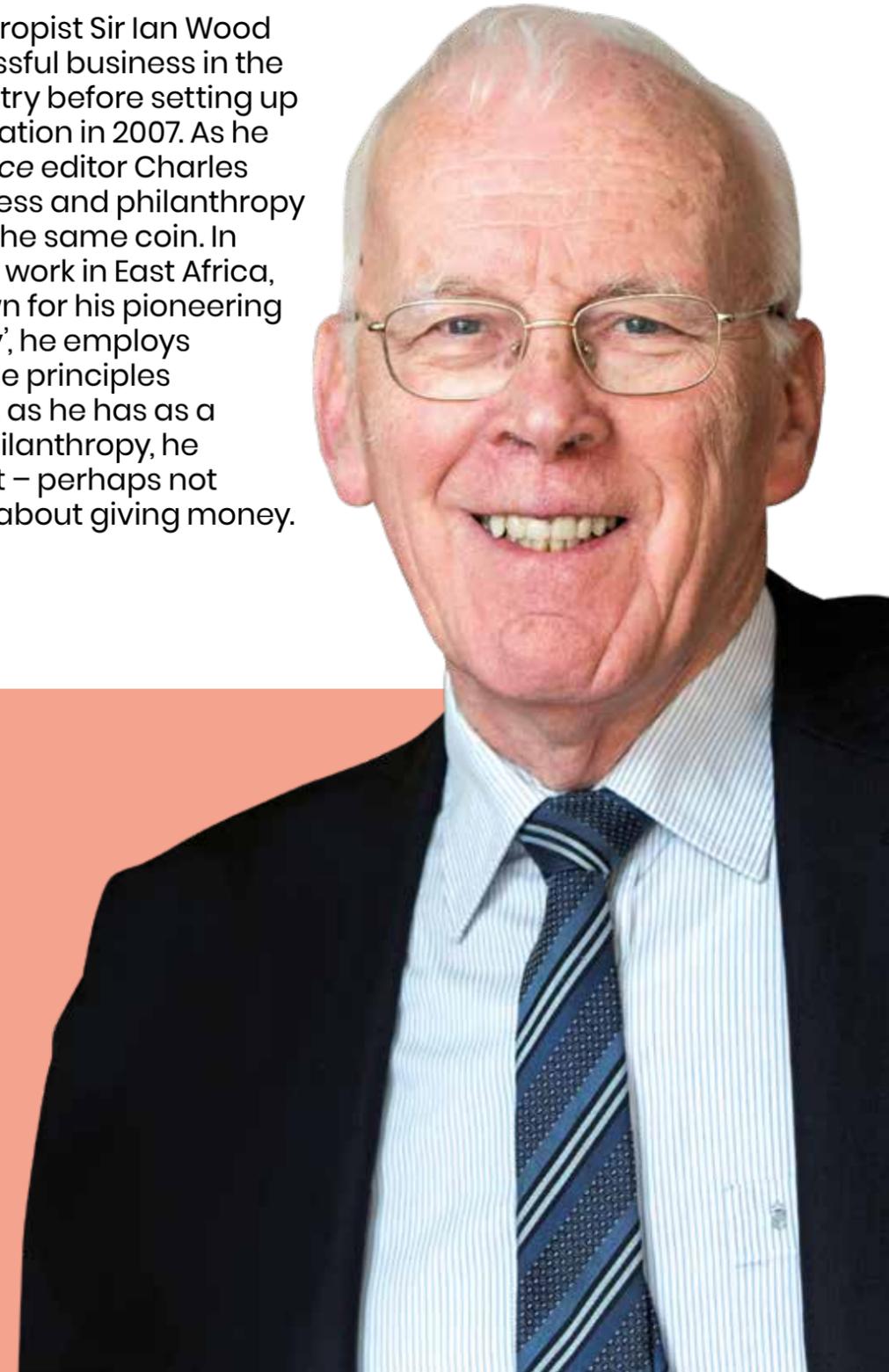
Real-Estate Developer

Convenes a diverse set of stakeholders to implement a complex, time-intensive solution that generally crosses sectors and traditional program areas.

Interview: Sir Ian Wood

Scottish philanthropist Sir Ian Wood created a successful business in the oil and gas industry before setting up The Wood Foundation in 2007. As he explains to *Alliance* editor Charles Keidan, his business and philanthropy are two sides of the same coin. In his philanthropic work in East Africa, where he is known for his pioneering 'tea philanthropy', he employs many of the same principles and approaches as he has as a businessman. Philanthropy, he argues, is not just – perhaps not even primarily – about giving money.

Sir Ian Wood
The Wood Foundation



Spotting the main chance

What inspired your philanthropy?

In 1960, I went to a very poor black township in Cape Town as part of a scholarship and I spent a week with a doctor who devoted two weeks a month, free, to providing medical services. There was a quarter-mile-long queue waiting to see her and I sat beside her and listened and watched. It completely reoriented my outlook to just how privileged we were in our western world.

I'd gone to South Africa intending to be a doctor, but I met some businesspeople there who had been successful and were able to do things that helped the country. So I pursued a career in business and by the 1990s, we'd become very successful in the oil and gas industry; I was very lucky to be in the right place at the right time.

Around that time, we started seriously going overseas to a number of African and South American countries and, particularly in the rural areas, massive poverty and massive inequity were very obvious. In some of the countries which were strong in oil and gas, the people in the country were getting no benefit whatsoever.

Is that when you set up The Wood Foundation?

Yes, in 2007-08. But what I'm doing in philanthropy is exactly the same as I've been doing in business. Part of that is putting in

time and effort and trying to understand the key problems and causes of inequity and what are the opportunities to overcome it, such as getting good people and putting together a plan. We're really trying to help people to help themselves, so we're not just giving them money. There are some charities doing that and they're essential, but we're looking at the economic opportunities for large groups of people and working with them to make them significantly more effective and efficient. We did market research and decided East Africa was the best place to be.

We looked at five different agricultural crops and chose tea because there's a large number of tea farmers in East Africa, a lot of whom weren't getting anything like a fair deal from the estates that they were selling their tea to. They were following what their fathers and grandfathers had done. They didn't know what fertilizer was and the yields they were getting were about a third of the yield of the estates that were farming alongside.

Which countries was this in?

Tanzania and Rwanda. We may go into a third country, we're looking at that just now.

So one of the business principles you adopted was choosing a good team, another was focusing on countries in a particular industry, and the third?

The third is analysing what's needed. How do you get farmers who have worked the land for a long time to start using fertilizer, to realize that in a range of ways they can

Below: Tea plantation in Rwanda.



We're really trying to help people to help themselves, so we're not just giving them money. There are some charities doing that and they're essential, but we're looking at the economic opportunities for large groups of people and working with them to make them significantly more effective and efficient.

improve the yield and the quality of their tea and therefore get a much better price for it? They just didn't think that way.

How did you go about that?

First, they didn't have money to try to improve the situation so we introduced some funding to enable them to buy fertilizer and to do a number of other things that they needed to get better yields, better quality. We bought a couple of factories in Rwanda and we've married the factory into the farm, so the farmers can go to the factory, they can see what's good tea and what's not good tea.

We train about 3,000 farmers a year in farmer field schools, not just in tea. We're now introducing a business module, because generally they don't think and plan ahead. It's a different world. They don't get up in the morning and plan in a business way, they get up in the morning and say, 'how am I going to feed my family today?'. It's very short-term thinking and we're slowly changing that. They're now able to buy livestock, they're able to be sure their kids are well fed and go to school. There's a whole range of things that we've managed to have some impact on.

What we'd like to do in time is hand the operation over to the farmers in time but we're not there yet. We're now planting large amounts of new tea with new farmers. We've got two areas of 4,000 hectares each in Southern Rwanda, a very poor area which was hard hit by the genocide. It's a big investment we're doing with DFID's help, which is very important because newly planted tea takes five years to mature so you need patient capital. We put in some funds, as do DFID, and the factory owner has put in some. The Gatsby Charitable Foundation are important partners because they were in Africa long before us and knew the African philanthropic scene. When we put the initial deal together to invest in East African tea production, it was agreed that we'd both equally finance it but we would manage it.

What was the scale of the investment?

I think we said we'd begin with \$10 million each but we've put a lot more into that since then because it's grown. The two factories that we've bought cost \$10 million each. »





Above: Sir Ian in Kigali, Rwanda.

Buying factories in Rwanda presumably involved the Rwandan government, which is known for good governance and resistance to corruption, but also for limiting human rights and free speech. How did that relationship work?

I can't comment on the free speech issue, but I will say that the Rwandan government are one of the better, if not best, governments in Africa to deal with. There's a very clear leadership. They clearly want to significantly improve the livelihood of the rural farming community. We had their backing and agreement for the changes we were making, and we work closely with them and advise them on some things.

So would you say your philanthropy in Africa is unpolitical, but rather seeks to focus on economic development?

We don't get involved in politics. We don't need to. It's about understanding the culture and reality. You can't go to a country in Africa and take your British mindset with you. You have to try and understand what's happening *there*, what the challenges are

and what *their* mindset is. There's some really good people there and, with encouragement, they're going to grow and develop their own good businesses in the long term.

Does your highly engaged approach mean you're a regular visitor to Africa?

I go once a quarter at least and have done over the ten years we've been working there. It's what you would do in business, you go and see what's happening yourself and ensure it's going all right. A philanthropist who sends money to a charity in Africa and leaves them to it is taking a massive risk. I've got a very good management team on the ground, but it's helpful for them to see me there.

Coming closer to home, what kind of philanthropic initiatives have you introduced in Scotland?

My part of Scotland, the north east, has become very dependent on oil and gas. By 2050, we'll be producing about 10 per cent of our current production. That's a huge



economic challenge and we can't wait another ten years to say we'll do something about it, so a number of us have set up a new initiative called Opportunity North East. It's financed, at present, by The Wood Foundation. We've put £29 million in for the first five years, and I've just undertaken to provide another £33 million for the second five years.

What will it do?

First of all, paradoxically, it's trying to ensure that we maximize the oil and gas recovery. We're also looking at other industries - food, drink, agriculture, life sciences, tourism - and we've set up a group on digital entrepreneurship which has been going for one year and is beginning to have some real impact. We're trying to balance the economy by strengthening the rest of the economy and that's beginning to work.

Do you see the creation of a balanced economy as a job for government, for entrepreneurs, for philanthropists or a combination of all of them?

It should be a job for government, but they see the north east of Scotland as a relatively



My nightmare is that the generation or two down the road will look back at my generation and say, 'you guys really took all the good out of it and look at the legacy you've left us'. I think people in the north-east of Scotland are waking up to this.

prosperous area and right now, we are. They won't look ahead 10, 20 or 30 years, so it's got to be local interests, philanthropic and business, that take the lead. I chair Opportunity North East, and it's led by the private sector. We've got about 80 different people sitting on the boards of five sector

groups. This is going to be a whole range of initiatives all contributing to significantly broadening our economy. My nightmare is that the generation or two down the road will look back at my generation and say 'you guys really took all the good out of it and look at the legacy you've left us'. I think people in the north-east of Scotland are waking up to this.

You've mentioned that you felt that your generation had not done as much as it might have done in philanthropy and you hope that the younger generation can do more. Is that a part of your vision for The Wood Foundation?

We want to ensure the next generation is more caring and participative in terms of both their local community and international challenges. I honestly think it's not that my generation doesn't care, they just feel they can't do anything about it and therefore they do nothing. The Youth and Philanthropy Initiative we've been running in Scotland for ten years is all about trying to get youngsters to understand that their local community has got problems and that they can do something about it. Small teams of students deliver a presentation on a local charity they've investigated and the winner within each school gets £3,000 to give to the charity of their choice. This year, over 31,000 secondary school students have participated. These youngsters are very mature and take it very seriously. At a gathering last year, for example, there were youngsters talking about mental health problems in their family, about the challenges of the gay community and about poverty. They're getting to grips with these issues and starting to think they can do something about it. And it's working. As soon as the kids came back with their presentations and told us how they'd been to see the charity and what they'd learned, I knew from their enthusiasm and their interest there was something special here. I think it's already having some impact on the attitude of the new generation in Scotland.

Do these youngsters see it as philanthropy, or simply as caring for one another?

I think caring is a much better word than philanthropy. You don't necessarily need to give away a lot of money. Some of the finest philanthropic people I know haven't given away money, they've given their lives. The doctors and nurses I meet in Africa, for example. They're way ahead of what I do.

Unusually, your foundation has also donated over £10 million to your local hospital to build a car park to serve the whole community.

Of all the things we've done, it's had by far the biggest appreciation from people in Aberdeenshire. A lot of people have to come »



Above: The Wood Foundation donated over £10 million to build a car park for a Scottish NHS hospital.

in from the country to visit or get treatment. Often they were leaving home at six in the morning to try to get there in time to get a parking space at the hospital. There's stories of people arriving at the hospital and driving round and round and then going back home again. The new car park is free to use. Funding for our public health service being what it is, hospitals don't have money to put into car parking, so they were very grateful.

You've been very successful in business, then gone on to set up The Wood Foundation in 2007. How do you decide how much of your wealth you want to allocate to society and how much to keep for yourself and your family?

I've honestly never thought about how much I was worth. I judge what I do by, for example, the two thank you parties the 10,000 farmers gave us in Africa and the number of letters we get from those using the car park. My family don't want for anything. So right now, I'm giving away a fair bit of the family wealth.

What's your view of investments? Do you see them simply as a way of generating returns or do you think you have to be careful what sectors or fields to invest in?

Within reason, it's the first. I don't have a huge knowledge of investments, so we choose really good investment managers, some of whom are clearly based on what they call sustainable investment. Sometimes when we invest, we will say we don't want to do this or that, but it's not a major issue.

As you'll know, in the philanthropic world there's been a move towards divestment from fossil fuels, because of climate change. How do you see that as someone whose fortune was made in the oil and gas industries?

The fossil fuel world has changed even since I left it in 2012 and almost everyone acknowledges that we need to change the mix of energy we use. But some 75 per cent of the UK's energy is currently met by fossil fuels and that will only have dropped to 66 per cent by 2035 because we can't develop other forms of energy fast enough. The world cannot stop using fossil fuels now, or how does the old lady in her flat in Fife warm herself and have a light to switch on? As well as thinking about tomorrow's needs, we have to meet today's because that is what feeds people and keeps them alive. We should take conservation of energy much more seriously because we don't conserve energy well and that's a lot of what causes the big fossil fuel demands.

In Africa we're involved in climate change protection in a range of ways. We're using solar heating in some places, we're certainly taking irrigation seriously, because climate change is going to have a bigger impact in Africa, so we're beginning to plan ahead. Frankly, it's a luxury to go round with a placard and say 'no to fossil fuels'. I'm realistic about this. I will subscribe to whatever steps are taken to develop alternative forms of energy but won't subscribe to something that will result in serious hardship for a lot of people. ●

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Special feature



Philanthropy's developers

#LiftUpPhilanthropy: A new vision for the
future of philanthropy infrastructure

Guest Editor **Maria Chertok**

Overview

Time for philanthropy infrastructure to step out of the shadows



Maria Chertok is director of CAF Russia and chair of WINGS.
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Philanthropy is going through big changes. Its support infrastructure must assert itself now

As philanthropy grows in importance and extends into new areas of the globe, it is crucial to ensure that there is an adequate support system or infrastructure to enable philanthropy to take advantage of opportunities and to protect against threats. The purpose of this special feature is to develop a set of arguments that the support system's role and place should be reimagined – for philanthropy's own good.

It is commonplace to say that philanthropy is changing. This change is a result of external influences such as technological developments, the rise of middle classes in countries with emerging economies,

the decrease of trust in institutions, governments' drive towards limiting the space for independent action, and an acute feeling of global crisis and failing systems. There are also important trends in the philanthropy and development sector itself that broaden the field of philanthropy, such as the rapid growth of non-institutional philanthropy and place-based giving, shifts in the development and aid paradigm towards a stronger role for domestic actors and private resources, increased pressure for greater impact of giving on the gravest problems, as well as rapid development of various forms of giving in emerging market countries.

This special feature presents a wide perspective on what could be defined as infrastructure for philanthropy in its modern sense. Research from the infrastructure body I chair, WINGS¹, demonstrates that the fastest growth in the philanthropy support system occurred in the last two decades, when the number of those organizations and the geographies where they developed increased dramatically. In this special feature, we aim to show that we are witnessing a step change in infrastructure development, in which an emerging variety of forms of infrastructure is beginning to play a much more complex set of roles in philanthropy worldwide.

It is important to define infrastructure not only as support for philanthropic institutions (foundations with paid staff) but as a response to a changing field. With the development of approaches such as social business and impact investment, the boundaries between philanthropic and commercial investment are blurring. Informal giving and social movements – crowdfunding and online platforms are two of the most obvious manifestations – are growing in importance. New actors whose specific purpose is to encourage philanthropy are emerging (fundraisers' associations), while teaching and research institutions, impact measurement specialists etc, are influencing how philanthropic decisions are made. Taken together these create a new, more involved picture of the field, as the infographic on the following page demonstrates.

You will notice that many of our contributors demonstrate the need for a cohesive, ecosystemic approach to infrastructure development that would enable better sharing of scarce resources, help to avoid duplication of function and foster collaboration towards common goals. Russian philanthropist and businessman Vladimir Potanin uses the analogy of a good hockey team (p46). Elsewhere, the European Foundation Centre's Hanna Surmatz (p60) provides a detailed analysis of how collaboration was critical to achieving progress in the Financial Action Task Force (FATF) case.

Such victories would not be possible without infrastructure organizations adopting a more active leadership role. This is a different attitude to the traditional view of infrastructure, which sees it as the invisible underpinning, like the electrical wiring in a building. Nowadays the most successful infrastructure players are vocal champions and thought leaders who foresee and actively build the common future for the philanthropic sector. Thumbnail sketches of people who have championed philanthropy development through infrastructure building (p47) reflect this trend.

When planning this special feature we tried hard to balance western and northern viewpoints with perspectives from places where the philanthropic sector and the corresponding infrastructure is less developed. Although there is less infrastructure there than needed, those brilliant organizations which have emerged in the last two decades in Africa, Asia, Latin America and Central and Eastern Europe are working really hard to fill the gaps that restrict the potential of domestic philanthropy – organizations such as the China Foundation Center, the Centre for Social Impact and Philanthropy at Ashoka University in India and the Kenya Community Development Foundation (p40).

And that potential is huge. 'Were the world's middle classes to dedicate just 0.5 per cent of their spending to charitable causes,' says CAF's *Laying the Groundwork for Growing Giving*, 'it would amount to an astonishing \$319 billion per year for much needed causes.' Most of this growth is forecast in emerging economies, hence the vital role of those players who facilitate the development of giving and its application for the public good.

Another response to this potential is the emergence of infrastructure which caters for non-institutional giving and is often non-institutional itself. It is frequently built on principles of social (hashtag) movements rather than traditional philanthropic institutions (see profile of #GivingTuesday global movement, p42) and utilizes the benefits of digital technology – another layer of infrastructure we tend to overlook. The contributions of Rhodri Davies (p55) and Lucy Bernholz (p56) provide an exploration of this issue, with its benefits and threats.

We hope that this special feature will set out a 'change-oriented' intellectual agenda for the future of philanthropy infrastructure and open the debate about how we can sustain and grow it where it is most needed. »

¹ *Infrastructure in Focus: A new global picture of organizations serving philanthropy.* WINGS, 2017.

Philanthropy development at a glance

Who are the philanthropy developers, enablers and accelerators? All those who contribute to the development of philanthropy volumes, quality and diversity.

Organizations / Who? Philanthropy developers, enablers, accelerators

- **networks and membership organizations:** national and regional foundations associations, thematic or geographic networks
- **academic institutions and researchers**
- **community foundations:** connecting donors and communities at territorial level
- **professional support organizations:** donor advised-funds, pooled-funds, philanthropy advisers, data dashboards, capacity builders, etc
- **non-profits promoting cultures of giving and a favorable environment:** eg fundraisers associations
- **private banks and other private philanthropic services**
- **tech-based bridge-builders:** online giving platforms, sms giving, etc
- **funders of infrastructure:** foundations, development aid organizations, individuals investing in the field
- **philanthropy media**

What kind of philanthropy do they support?

- individual giving
- community/grassroots philanthropy
- institutional philanthropy: corporate, family, operational, grantmaking

What do they do?

- provide space for mediation and exchanges (peer learning, synergies, dissemination of solutions, connections)
- stimulate philanthropy volumes (promote giving)
- build capacity (tools, knowledge, leadership dev.)
- provide thought leadership (new thinking, innovation, challenge)
- work for an enabling environment (advocacy, collective voice, improve regulations and incentives)
- build standards (trust and accountability)

Why is it needed?

- **community level:** build community resources for long-term sustainability
- **area level:** leverage more and better resources for specific causes
- **national/regional level:** ensure functioning overall environment for philanthropy to thrive, including sensitive regulation, high standards, availability of broad array of support services
- **global level:** connect philanthropic actors, practices and cultures worldwide, bridging donors and recipients, positively influencing the global framework for philanthropy

For which overall goal?

Build stronger and more sustainable civil societies to achieve sustainable development

Guest Editor **Benjamin Bellegy**

Overview

Heads together to #LiftUpPhilanthropy



Benjamin Bellegy is executive director of WINGS.
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There are many good reasons to invest in infrastructure and all of them point to the need for concerted thought and action

It is not that common to debate the question of philanthropy infrastructure. It's rare to turn the spotlight on this field which tends to play behind the curtains, to remain relatively intangible and generally unknown outside its own circle.

Maybe one of the reasons is the term itself. Words are not neutral, they create reality. 'Infrastructure' evokes a static set of tubes, channels, bridges, that belong to the background. It allows cars to run, water to run and services to function, but has no active role. As this special feature shows, this field is much more than that. It is about leading, about developing and harnessing private resources for social good, about building civil society and democracy and about laying the necessary foundations to achieve the Sustainable Development Goals (SDGs).

Moreover, reflecting the complex and increasingly diverse mix of organizations – philanthropy's developers, enablers, accelerators – that dedicate their energies and talents to increasing the volume, quality, and diversity of philanthropy, this special feature is about their contribution and how to unleash their potential in serving the needs of societies.

Philanthropy support has impact...

WINGS' own research on community philanthropy¹ shows that countries with dedicated support organizations for community philanthropy have created nine new community foundations in three years, versus fewer than one in countries with no support organization. An initiative such as #GivingTuesday has generated millions of dollars for civil society through a very effective approach which harnesses 'New Power'. Foundations' associations in many countries have successfully advocated for regulations that have enabled the application of billions of dollars to the common good.

...so why is it under-funded where it's most needed?

Why do most of these organizations struggle for resources and report ongoing concerns about their sustainability? Why is infrastructure so little developed in the global south and east where it is the most needed? WINGS' research last year (see reference in »



There are some encouraging signs that a growing number of funders, including individual philanthropists from emerging market economies, but also non-philanthropic funders such as development aid agencies, are strengthening their investments in this field.



Maybe we should consider philanthropy as a cause in its own right, understanding that the act of giving is a key element of democracy.

Maria Chertok's article, p34) showed that 80 per cent of philanthropy infrastructure spending is in North America, while only 5 per cent goes to Asia and the MENA region combined. Why, even where the field has a long history and is well developed, does it face issues such as untapped potential for synergies, unnecessary competition and a history of networks and other support organizations that flourish briefly, then wither for want of support? In each case, it is because the field has seldom been considered as a strategic area by funders.

Contributions from Yanni Peng, Ridgway White, Vladimir Potanin and Oksana Oracheva show how visionary funders from different regions understand that this support ecosystem is central to their mission and there are some encouraging signs that a growing number of funders, including individual philanthropists from emerging market economies, but also non-philanthropic funders such as

80%

of philanthropy infrastructure spending is in North America



Above: Investing in philanthropy development – funders debate philanthropy infrastructure at the WINGS meeting held at La Caixa Forum (above right), Barcelona, in March 2018.

development aid agencies, are strengthening their investments in this field and integrating them into their core strategy for tackling the SDGs. The story of Laurence Lien (p48) who dedicates his philanthropic efforts to encouraging the wealthy to give better and more collectively for increased impact is just one inspiring example.

Three good reasons

Even without thinking too hard, there are three good reasons for supporting infrastructure along the lines set out in this special feature. First, achieving the SDGs will require an estimated \$7 trillion. The Foundation Center calculates that institutional philanthropy's contribution will be around \$365 billion. We need to grow resources and spend that money well. Both will require a sound support ecosystem. We must address the civil society and philanthropy infrastructure piece consistently if we want to be serious about achieving the SDGs.

Second, the global context calls for a new aid paradigm whose cornerstones are local hubs and more local leadership for development initiatives, and more collaboration across sectors. Again, all of this can only happen with strong domestic infrastructures. Finally, maybe we should consider philanthropy as a cause in its own right, understanding that the act of giving is a key element of democracy. It builds trust, relationships and represents an important way for citizens to engage in society.

That's why, here's how...

In concrete terms, how can philanthropists support this field? First and foremost, funders should contribute to building a strong ecosystem in their own countries. In addition, there's lots of scope to draw on existing areas of interest. For example, are you supporting rural communities in Africa? Help them tap into local private resources and improve their



fundraising skills. Working to combat climate change? Invest in networks and organizations that will increase the awareness of this cause among the funder community. Highly involved in supporting the development of poor countries? Support the emergence of local philanthropy associations and assist organizations that will boost domestic philanthropy.

Whatever the answer, what matters is to think holistically about how to develop philanthropy. It is about looking at this field from different perspectives, moving from the contractual ('I need service, I pay for it'), to the 'good citizen' ('it is my responsibility to contribute to the field'), to the strategic ('I want to leverage more, mitigate risks and strengthen the sustainability of my work').

This is not only a question for funders individually. If this field is an ecosystem, it needs to be developed with intelligence and to be interconnected, and it needs to be locally relevant. It is therefore essential to coordinate the approach among funders and do so 'upstream'. The International Meeting of Funders of Infrastructure co-hosted in Barcelona² by WINGS and La Caixa Foundation in March 2018 highlighted this potential and led to the launch of a global effort to foster strategic discussions in different regions. We hope a growing number of actors will join the movement, #LiftUpPhilanthropy, and engage in strengthening the field. We believe this is the path to follow if we want to draw on the huge potential of all forms of philanthropy and giving. ●

¹ <https://tinyurl.com/WINGS-focus>

² <https://tinyurl.com/WINGS-Barcelona>

Types of philanthropy support

The world of philanthropy support is increasingly multi-faceted. Philanthropy 'infrastructure' is something of a catch-all for a multiplicity of organizational forms and functions which defy easy categorization, all reflecting the growth, proliferation and overlapping nature of philanthropy support. The examples below give a flavour of this variety

DATA ON FOUNDATIONS

Foundation Center, US

A leading repository of information on foundations which describes its mission as to 'strengthen the social sector by advancing knowledge about philanthropy in the US and around the world'. The Foundation Center maintains extensive databases on grantmakers and their grants especially in the US foundation sector. It also conducts research and training, produces directories, research reports, and non-profit management and fundraising guides. Its publications include *Foundation Directory and Philanthropy News Digest*.

<http://foundationcenter.org>

China Foundation Center, China

Formed in 2010 by a group of 35 foundations, CFC describes itself as 'an independent non-governmental information disclosure platform' for Chinese foundations. Its founding rationale was to bring greater transparency to a burgeoning Chinese foundation sector to combat state suspicion on the

one hand and public mistrust on the other. It took the US Foundation Center as its model. It maintains a database of Chinese foundations and, through its board and management team, it also offers expert advice.

<http://en.foundationcenter.org.cn>

PHILANTHROPY THINK-TANK

New Philanthropy Capital, UK

Describing itself as a 'consultancy and think-tank dedicated to helping charities and funders achieve the greatest impact possible', NPC was set up in 2002 by then Goldman Sachs partners, Gavyn Davies and Peter Wheeler. Its clients include foundations and philanthropists and it offers consultancy and advisory services as well as commissioned research to inform and influence public policy. Its funding comes from a mix of earned income and donations. Its 2016 Annual Report notes the contributions of both the Oak and Tuixen foundations to its core funding.

www.thinknpc.org

PHILANTHROPY RESEARCH AND TEACHING

Centre for Social Impact and Philanthropy, Ashoka University, India

Established in 2016, CSIP is India's first academic centre whose aim is to enable strategic, robust philanthropy for social impact. Led by Ingrid Srinath, the Centre is supported by the Bill and Melinda Gates Foundation and Citibank, along with Indian philanthropists Ashish Dhawan, Amit Chandra and Archana Chandra. The Centre's aim is to address some of the critical gaps in Indian philanthropy by providing research into the sector, capacity building programmes particularly on leadership and governance, and clear norms and standards of good practice.

www.ashoka.edu.in/page/csip-63

CLASSIC DONOR ASSOCIATION

Philanthropy Australia

Philanthropy Australia's aim is to serve the country's philanthropic

community in order to create 'more and better philanthropy'. Though its 800 members are primarily trusts and foundations, they also include corporates, families, individual donors, professional advisers, intermediaries and not-for-profit organizations. Its services include advice, advocacy, conferences and seminars, provision of information, and peer learning and training. Among the most striking of its activities, it organizes an annual series of awards, the Australian Philanthropy Awards and an annual Philanthropy Meets Parliament summit which brings together politicians and donors.

www.philanthropy.org.au

HYBRID DONOR ASSOCIATION

Fondation de France

Established in 1969 on the initiative of Charles de Gaulle and then minister of culture, Andre Malraux, Fondation de France is nonetheless a private foundation. It is a combination of donor, funding its own programmes, and philanthropy support organization. In its donor role, it describes its projects as 'general interest' and since its creation has supported over 160,000 projects in areas such as preventing school dropout, employment, housing and medical research. As a philanthropy support organization, it provides an umbrella under which donors can create their own foundations, offering funding, technical support and advice, research, networking and the sharing of best practice.

www.fondationdefrance.org

GRASSROOTS PHILANTHROPY INFRASTRUCTURE

Kenya Community Development Foundation

KCDF provides grants, advice, information, peer learning and training, as well as advocating the cause of communities and

organizations with the state and public institutions. Its areas of special interest are education, water, sanitation and health, early childhood development, education, urban and rural livelihoods, and youth development. It has also been at the fore in pushing for policies to create a more favourable climate for philanthropy in East Africa and was instrumental in the formation of the African Grantmakers Network.

www.kcdf.or.ke

PHILANTHROPY ADVISERS

Active Philanthropy, Germany

Founded in 2006 by Felicitas von Peter who, with Michael Alberg-Seberich, is one of two managing partners, Active Philanthropy is a charitable company providing impartial philanthropy advice primarily to individuals and families. In addition to the fees it charges for its services, the company derives its income from individuals involved in philanthropy, who also act as trustees and as mentors to clients. It also sees itself as a 'network of networks' (the institutions of which it is a member include the European Venture Philanthropy Association, European Foundation Centre and the Association of German Foundations) which allows it a wider range of contacts and resources than its small size would suggest.

<http://activephilanthropy.org>

WEALTH MANAGEMENT ADVISERS

UBS, Switzerland

UBS is one of an increasing number of private banks and wealth managers which offers advice on philanthropy to ultra-wealthy clients. Based in Switzerland and with a presence in 52 countries, it offers advice on areas such as developing a strategy, simplifying giving and maximizing impact. It also provides advice on family philanthropy, succession planning, the different

forms of giving vehicles (it has its own foundation, the UBS Optimus Foundation, and donor-advised fund) and provides introductions to other philanthropists. It also organizes elite events chief among which is the annual UBS Philanthropy Forum.

www.ubs.com

CROWDFUNDING PLATFORM

Tencent Charity Foundation

In 2007, Tencent Holdings became the first Chinese social media company to set up a foundation, the Tencent Charity Foundation. In 2013 it added a philanthropy site, Tencent Charity, a mobile and desktop donation venue, to its WeChat social platform, which has an estimated 938 million users and has stimulated mass small-scale giving. Its e-payment system allows donations of less than \$1 and users can pick from more than 24,000 regularly updated individual causes in China and around the world. According to a *Forbes* article in May 2017, some 100 million users had donated 1.7 billion yuan (\$250 million), an average of only 17 yuan, or \$2.50 per user.

www.tencent.com

DONOR PLATFORM AND SERVICES

Asia Philanthropy Circle

Based in Singapore, APC was set up in 2015 as a platform for Asian philanthropists to increase the impact of their giving through coordination of their efforts, exchange of information and collaboration between members. Set up by Singaporean philanthropists Laurence Lien, Stanley Tan and Indonesian philanthropist Cherie Nursalim, APC, like KCDF, instigates projects and its prime movers are themselves experienced philanthropists. At present, it has 27 members, philanthropists from Singapore, Indonesia, the

Philippines, Malaysia, Thailand and China. Membership is by invitation, rather than open to all donors. In addition to trying to stimulate social change through its projects, it also advocates for the role of Asian philanthropy throughout the region, builds the capacity of donors and brings together leaders from different sectors and regions in order to try to produce concerted action.

www.asiaphilanthropycircle.org

SOCIAL MOVEMENT

#GivingTuesday

Launched by US non-profit 92nd Street Y, in New York in 2012, to celebrate giving and to serve as an antidote to the commercialism of Black Friday and Cyber Monday, the #GivingTuesday idea has spread rapidly. In the most recent series of events, in 2017, 42 countries took part – among them Brazil, Uruguay, Uganda, Liberia, Russia, India and Singapore – many of which have vastly different philanthropic cultures. Using the reach and influence of social media, #GivingTuesday provides a platform for social sector organizations to showcase their activities and for donors to help support them. While the founding team offers support, those operating #GivingTuesday campaigns are free to modify the original idea according to local circumstances. The 2017 campaign produced over \$300 million in online gifts.

www.givingtuesday.org

RISK MANAGEMENT/ DE-RISKING SERVICES

NGOsource

NGOsource, a joint venture of TechSoup and the Council on Foundations, helps US grantmakers streamline their international giving. Launched in 2013, NGOsource's equivalency determination (ED) process simplifies the task of evaluating

whether a non-US organization is the equivalent of a US public charity. Grantmakers join NGOsource and, for a fee, can request an ED on a given NGO. NGOsource deals with the entire process and issues an ED certificate or explains why the NGO doesn't meet the criteria. Details of the NGO are then held on NGOsource's database in order to expedite future ED requests, which speeds up the process and eases the burden of cross-border giving for both donor and grantee.

www.ngosource.org

PROFESSIONAL SUB-ASSOCIATION

Association of Fundraisers, Brazil

The Associação Brasileira de Captadores de Recursos was founded in 1999 by a group of Brazilian fundraisers with the purpose of establishing a national network of their fellows to strengthen professional links, provide a platform for the exchange of technical information and generally increase the standards of the sector. It also works to ensure the credibility and representativeness of the profession in the eyes of both state and people. Membership is open to both institutions and individuals and, according to its website, it currently has over 400 members. It runs an annual conference, the ABCR Festival and a free online platform on fundraising knowledge, Captamos (www.captamos.org.br).

<http://captadores.org.br>

PHILANTHROPY WATCHDOGS

Inside Philanthropy, US

Inside Philanthropy is a website providing coverage of institutional philanthropy principally in the US. Created in 2013 by former Demos Senior Fellow, David Callahan, who is still its editor, it aims to increase oversight and transparency in

large-scale philanthropy. It states, 'we believe the resources of philanthropy should be accessible to all, not just to those with the right connections'. It issues its own set of awards, such as the Philanthropist of the Year award and the Boldest Philanthropic Vision award, and is noted for its 'relative generosity' index, rating donors who score poorly in its estimation when it comes to the proportion of their wealth they have given away. In its own words, 'while... we write often about smart and creative funders, we raise tough questions about the role of private money in public life'.

www.insidephilanthropy.com

National Committee for Responsive Philanthropy, US

Founded in 1976 by Pablo Eisenberg, Thomas Asher and Jim Abernathy, the self-styled 'independent watchdog of philanthropy' (it should be noted that its work is confined to the US) aims to promote a philanthropy that 'serves the public good, is responsive to people and communities with the least wealth and opportunity' and which holds itself 'accountable to the highest standards of integrity and openness'. It works through a combination of advocacy campaigns, research and initiatives like the NCRP Impact Awards which honour foundations showing 'leadership, innovation and commitment' in dealing with pressing social problems.

www.ncrp.org

Leadership

Why infrastructure should be a strategic priority

Funders views

Philanthropy infrastructure is a crucial tool that enables the realization of potential to nurture philanthropic pursuits

Yanni Peng CEO of Narada Foundation

In 2007, Narada Foundation gave a three-year grant to Non-Profit Incubator (NPI), the very first incubator for non-profit organizations in China. And this is the first philanthropy infrastructure we invested in. The grant was used to cover NPI's running costs. Within five years, the landscape of non-profits was totally changed – a substantial number of new grassroots NGOs had emerged and had begun to show their impact. The second piece of philanthropy infrastructure we co-initiated and funded is the China Private Foundation Forum where private foundations network and share learning and concerns with each other. We have funded it for nine consecutive years. Now known simply as China Foundation Forum, it has significantly energized the

foundation sector in China and its annual conference is now regarded as the most influential networking platform for Chinese foundations. Its 2017 annual conference attracted nearly a thousand participants from foundations and non-profits including 200 foundation CEOs and board chairs. »



One infrastructure organization can reach and serve anything from a few dozen non-profits and foundations to thousands. In other words, by supporting the infrastructure organizations, we can actually achieve impact on a much greater scale.





These are just two examples of the kinds of philanthropy infrastructure Narada Foundation has funded and supported. We have witnessed the enormous value they have created for the non-profit and philanthropy sector. Compared to funding individual non-profit, the effects for the sector of supporting infrastructure are multiplied. It encourages new organizations to be set up, builds NPOs' capacity, enhances the sectoral information and data flow, establishes sectoral ethics and standards, strengthens networks at various levels, and is an advocate for a better legal and regulatory framework. All of these are indispensable for the non-profit and philanthropy sector to thrive. It is also a more efficient way for funders who want to support the sector. One infrastructure organization can reach and serve anything from a few dozen non-profits and foundations to thousands. In other words, by supporting the infrastructure organizations, we can actually achieve impact on a much greater scale.



While funding is important, it is far from enough to build an effective infrastructure organization. We need to link them to other networks, introduce them to other funders, build up their capacity and contribute to their board governance.

At Narada Foundation we have learned that the impact of supporting sectoral infrastructure takes time to make itself felt. Funders have to be patient which means they need to be prepared to provide multiple-year grants, accept the fact that there won't be much immediate return, be comfortable to be not in the spotlight, and also tolerate failures. And while funding is important, it is far from enough to build an effective infrastructure organization. We need to link them to other networks, introduce them to other funders, build up their capacity and contribute to their board governance.

In a nutshell, building up philanthropy infrastructure needs determination, patience and skill. But it is well worth the effort.

Above: The 2017 China Foundation Forum

Ridgway White President of the Charles Stewart Mott Foundation

There are many reasons why supporting philanthropic infrastructure is an essential part of the Mott Foundation's work. Here are three:

The first goes to the heart of our existence. Philanthropies cannot take for granted our right to exist, the ability to do the work we do or the kind of trust we want others to invest in us. Through our work in Central and Eastern Europe, we have seen governments suppress civic engagement by creating laws which make it impossible for the independent sector to have an independent voice. In the US, infrastructure organizations have defended us against burdensome changes in the tax code. They have also resisted special interest groups who tried to strip prohibitions barring political activity, which would have destroyed trust in the charitable sector.

Secondly, infrastructure organizations nurture the philanthropic sector and charitable organizations, helping us to improve our work, build capacity and share knowledge with one another. In doing so, they equip the sector to respond to the most serious challenges of our times – both those we see coming and those that take us by surprise.

And that leads me to the third reason: all of us count on the wider charitable sector to respond when government and the private sector fail to protect people. Our foundation witnessed the importance of this role in our hometown of Flint, Michigan. We saw the value of strong non-profits working collaboratively during the darkest days of the city's water crisis. Non-profit leaders were the first to discover elevated lead levels in our city's children, and they also were the first to help while government officials were still pointing fingers. Three years later, they continue their efforts to help the city recover and rise.

As trusted members of the local community, Flint non-profits serve as a vital link between policymakers and the public. This trust comes when organizations function well, are governed well and are in tune with the people they serve. Infrastructure organizations help make that possible.

Flint non-profits were ready to help when crisis hit, due in part to long-term support from regional and national infrastructure organizations. For Mott, this example also rings true across our national and international work – from Flint to the Amazon, Central and Eastern Europe, and South Africa.

Creating and maintaining a robust infrastructure isn't a problem to be solved. It's a never-ending process that is essential to nurturing and sustaining a strong philanthropic and non-profit sector and a vibrant civil society. The Mott Foundation would never want to see a world where civil society fades away because we didn't do all we could to sustain and protect it. »



Infrastructure organizations nurture the philanthropic sector and charitable organizations, helping us to improve our work, build capacity and share knowledge with one another.

Vladimir Potanin Founder of the Vladimir Potanin Foundation

I believe that strong philanthropy needs professionals and partnerships. We cannot afford to rely on emotions and stay in our own small world. We need to be ahead in our technologies, instruments and practices to be real leaders who care about communities in need, value every opinion, and want to build a better society. To do that successfully, charities need to take professional decisions, as business leaders do. We need the ideas and the creative solutions the best people can offer. But we are not alone. As in business we need to be transnational and global, we need mutual understanding, we need true partners in every sphere – our own communities, business, media and the state. Think of it like an ice hockey team – each player brings a unique personality to the team but only through cohesion and working together can the team win. We need institutions capable of building such a team which will connect individual ability with the power of partnership.

Oksana Oracheva General director of the Vladimir Potanin Foundation

The complexity and global nature of today's problems – economic, ecological, political, educational and even cultural – increases people's distrust in institutions. Many of them, not excluding charities, have failed to provide timely and effective responses to people's needs and it's legitimate for both donors and the communities we serve to ask: do we really need to spend money on philanthropy infrastructure? In the era of the internet and blockchain, could we leave institutions aside?

We at the Vladimir Potanin Foundation have no doubt that it is far too early to say that institutions do not matter. All our grantmaking experience justifies the view that setting up clear and just rules of the game, having in place professional services, relying on research in our decision-making, and supporting knowledge building and professional development are all crucial for achieving long-term positive change.

In order to build something that might even last beyond our own lives, we believe there is a need to invest in three elements: individuals, creative ideas and institutions that are crucial to implementing the ideas leaders have. In none of these areas are immediate and easily measurable results possible. That means we should invest in building trust and promoting the core human values that will be part of a better society.

That is why philanthropy development along with education and culture is one of the core areas of our support.



In Profile

Pioneers of philanthropy support

Alliance associate editor Andrew Milner profiles some of the key people past and present who have been instrumental to the development of philanthropy infrastructure and have made major contributions both internationally and in their respective countries

Barry Gaberman, US



Few individuals have done more for the cause of philanthropy infrastructure than Barry Gaberman, both as funder

and actor. During his time as senior vice-president at the Ford Foundation, he organized the first international meeting of associations of grantmakers in Mexico City in 1998, which went on to become institutionalized as Worldwide Initiatives for Grantmaker Support (WINGS). He has also served on the boards of the Council on Foundations, the Independent Sector, the European Foundation Centre, the International Fellowships Fund and the Foundation Center and is chair emeritus of the WINGS Board of Directors.

Quoted in a WINGS report earlier this year, Gaberman summed up the often ambivalent attitude of the sector towards its infrastructure organizations: 'The public sector and the for-profit sector would never, never think of de-funding the support organizations for their sectors, yet when you come to the non-profit sector... there is such a grudging, a niggling commitment to funding the infrastructure that it's embarrassing.'

Neera Nundy, India



With a background as an investment banker, Neera Nundy became the founder and partner of Dasra in 1999, an organization

that is perhaps the most critical component of the philanthropy infrastructure in a country underserved in that respect.

Dasra uses research-led processes to build a more strategic philanthropy in India and to encourage development of non-profit leaders in education, health and livelihood creation. Nundy incubated the Dasra Social-Impact programme, an executive education programme for social entrepreneurs, enabling more than 500 social organizations to receive over \$40 million in funding in the past 14 years.

She had a pivotal role in engaging with USAID and Kiawah Trust to form an alliance that focuses on reproductive, maternal and new-born child healthcare and adolescent girls' empowerment. An Aspen Institute Fellow and board member of Mann Deshi and Jaipur Virasat foundations, in 2009 she launched the Indian Philanthropy Forum, a network of over 250 philanthropists and corporate foundations which enables dialogue and collective giving among its adherents.

Marcos Kisil, Brazil



Originally a doctor of medicine, Marcos Kisil worked as a consultant to the Pan American Health Organization

before becoming director for Latin American and Caribbean Programmes at the W.K. Kellogg Foundation in Michigan. In 1999, he left Kellogg to found the Institute for the Development of Social Investment (IDIS), one of Brazil's key philanthropy support organizations which, in partnership with the Global Philanthropy Forum, holds the annual Brazilian Philanthropy Forum. The idea behind IDIS was to provide technical support to companies, communities, families and individuals who wanted to practise private social investment (the preferred name for philanthropy in Latin America) in a strategic and innovative way. IDIS also seeks to systematize models of social intervention that contribute to reducing social inequalities in Brazil. Kisil has also been involved in other infrastructure organizations, as a board member of the Brazilian Group of Institutes, Foundations and Enterprises (GIFE) and a member of the editorial board of *Alliance* and other publications.

Caroline Hartnell, UK



Guest editor Maria Chertok writes... Caroline Hartnell was editor of *Alliance* magazine for 16 years,

making a significant contribution to the development of a global philanthropy media.

Known for her modesty, extensive knowledge of the sector, highest journalistic and ethical standards, and work ethic, she inspired support for a philanthropy media because she made people feel ownership of it – a considerable achievement by the editor of an industry outlet.

Under her editorship, *Alliance* established itself as a critical friend challenging us to question our assumptions, and to look at things from a different perspective. Hartnell continues to shape debate in the sector, authoring reports on global philanthropy for the Philanthropy for Social Justice & Peace network including first-in-kind working papers on India, Russia and the Arab region. She is also a co-founder of the Olga Alexeeva Memorial Prize for developing philanthropy in emerging market countries.

Laurence Lien, Singapore



Laurence Lien, who is both a donor (he is head of the Lien Foundation) and prominent in the development of

infrastructure in South East Asia, served as CEO of the National Volunteer & Philanthropy Centre (NVPC) in Singapore from 2008-14. Under his leadership it became an important enabler and capacity builder for Singapore's non-profit sector. Among many new initiatives at NVPC, Lien led the development of popular volunteering and donation platforms SG Cares and SG Gives, and the formation of the Centre for Non-Profit Leadership. He is also a board member of the Lien Centre for Social Innovation at the Singapore Management University. More recently, Lien was one of the founder members of the Asia Philanthropy Circle (see p41). His involvement with APC is a natural extension of his belief that exchange and collaboration are necessary to the fulfilment of the potential of Asian philanthropy.

Bill White, US



Bill White was CEO of the Mott Foundation from 1976 until his retirement in 2014, becoming its chair in 1988. Under his

leadership, Mott evolved from a primarily local to an international foundation. It also developed into a strong supporter of philanthropy infrastructure, becoming one of the few US foundations to provide significant funding for infrastructure outside the country (the others include Ford, Kellogg, Hewlett and the Rockefeller Brothers Fund). Among other commitments, White has been a long-time funder of WINGS and supported the European Foundation Centre in assisting the development of civil society in Central and Eastern Europe after the fall of the Berlin Wall and the collapse of Communist power in the region, work in which the Mott Foundation also assisted directly. He also serves on the boards of CIVICUS and the European Foundation Centre. 'We can't solve all the world's problems – we don't have the resources,' he said in an interview with *Alliance* in 1999, 'but by funding infrastructure we provide a way for individuals and groups to exercise their charitable impulses.'

Robert Payton, US



Robert Payton was one of the founders of philanthropy studies as an academic discipline. Following terms as president

of C W Post College and Hofstra University in New York, as a State Department official, ambassador to Cameroon and head of the Exxon Education Foundation, Payton, who died in 2011, became the first executive director of the Center on Philanthropy established at Indiana University (later to become the Lilly Family School of Philanthropy) in 1987. Starting from the preoccupation that, while programmes to train non-profit leaders and grantmakers had proliferated, to quote his obituary in the *Chronicle of Philanthropy*, these often 'focused more on the "hows" of philanthropy than on its "whys"'. His aim was to redress the balance and to create a form of education in philanthropy which 'emphasized the importance of obtaining a broad understanding of society rooted in the liberal arts'. With his former student, Michael Moody, he wrote *Understanding Philanthropy: Its meaning and mission*, which offers new ways of looking at philanthropy and in some ways lay the groundwork for its study.

Olga Alexeeva, Russia

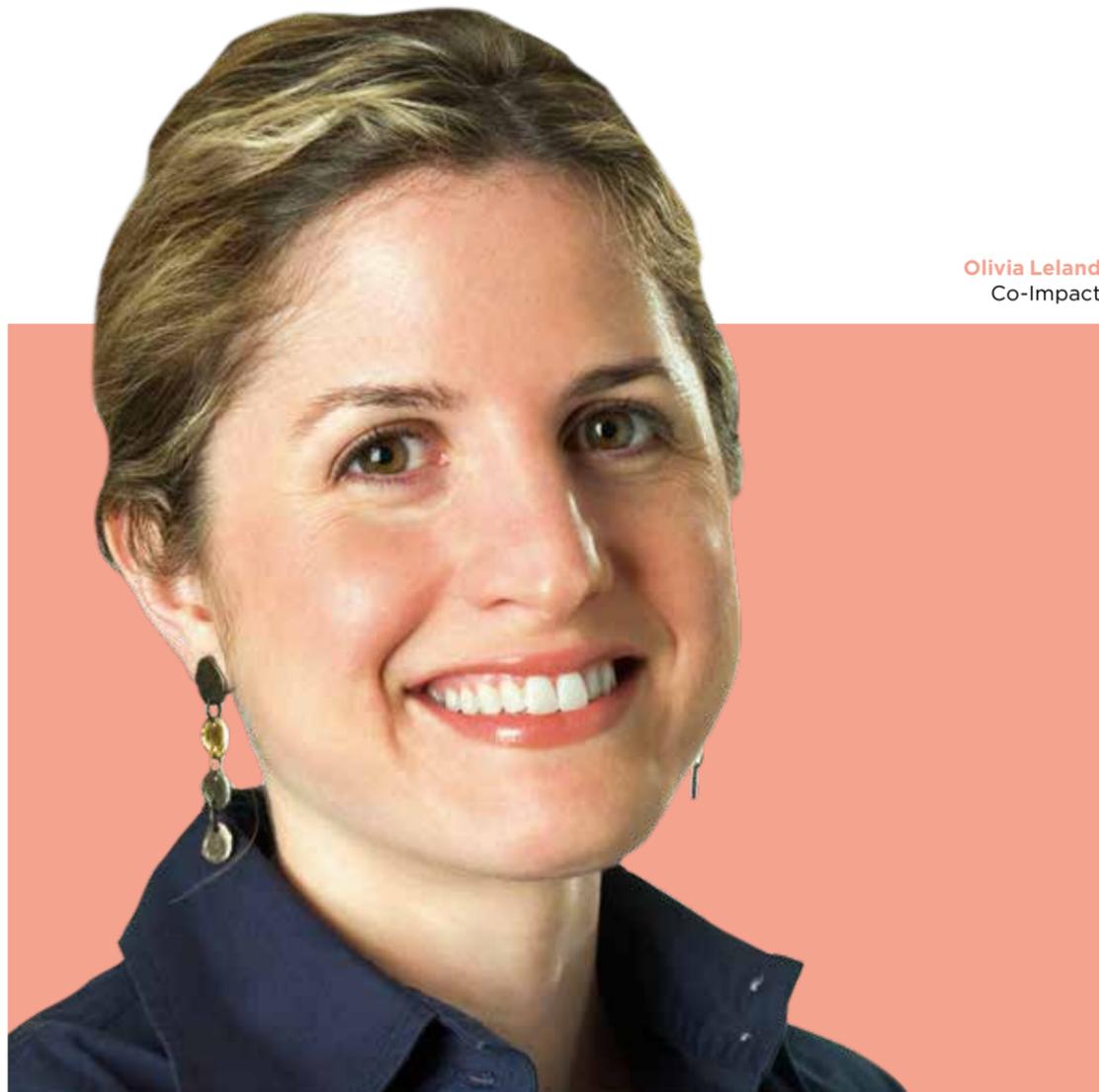


Olga Alexeeva was director of CAF Russia from the 1990s until 2005, when she became head of the CAF Global Trustees.

A champion of philanthropy in emerging markets, particularly in Brazil and Russia, she founded the Foundation School and, in 2010, set up her own charity, the Philanthropy Bridge Foundation (PBF), to take forward the development of emerging-market philanthropy. Following her death in 2011, the trustees of the PBF established the annual Olga Alexeeva Memorial Prize in her memory, which honours those who have done most to promote the practice of philanthropy in emerging market countries. She was also a member of the *Alliance* editorial board and a frequent contributor to the magazine.

Interview: Olivia Leland

Olivia Leland has been at the forefront of two of the most notable global philanthropic initiatives, first at the Giving Pledge and now as founder and CEO of Co-Impact. Between them, they have prompted wealthy individuals and foundations to give more and differently. As she tells *Alliance* editor Charles Keidan, both initiatives are about far more than raising or distributing money. They are about creating the collaborative means to use it more effectively and create change at scale.



Olivia Leland
Co-Impact

Shifting the focus to large-scale systems change

You were the founding director of the Giving Pledge. How did you become involved with that?

The Pledge came out of conversations that Bill and Melinda Gates and Warren Buffett had with philanthropists around the world on encouraging philanthropy. It was very much at the exploratory stage when I was at the Gates Foundation but I was tremendously excited by the potential, so I moved over to work on what a year and a half later became the Giving Pledge, going and talking to people and fleshing out the idea before we launched it.

Did the results exceed your expectations?

I remember Warren saying, 'Even if we had ten or 15 families join the Giving Pledge that would be great', and now it's more than 170. More important than the numbers is the community it has created that is talking about how to make philanthropy more effective, because that was part of the idea from the outset. Not everybody needs to sign the Pledge, but, for those who do, by sharing their Giving Pledge letters and why they believe so strongly in philanthropy, it is creating a space for learning. The people who take the Giving Pledge are not only joining but also leading the effort by defining what's needed for them to be more effective, because this is not an effort by Bill, Melinda and Warren, but something that is co-owned by everybody who takes the Pledge.



In addition to our core partners, who will select the opportunities that we support, we also have the Co-Impact community, which is a much broader group of philanthropists who will support and engage with the opportunities and have a smaller financial commitment.

How did the conversations go around the world?

One of the very important things that came out was seeing the need to support more of what is happening around the world through a global effort, while recognizing local differences. In India and China, for example, there are amazing examples of philanthropists who are doing work that's driving significant impact. Bill especially spends a lot of his time talking to philanthropists outside the US.

In terms of concerting philanthropic efforts, Co-Impact seems a logical extension of work you'd been doing on the Giving Pledge.

How has Co-Impact developed so far?

The Giving Pledge is one aspect of creating greater impact through philanthropy. I was interested in what other infrastructure is needed and what we can do to support it. I was actually funded by Giving Pledge members to look into that, Jeff Skoll and Bill and Karen Ackman. I interviewed about 250 people around the world, mostly non-profit leaders, to ask what philanthropy could do to have more impact. Many of them, even the ones that have tremendous impact and proven models, said that they've reached only 1 or 2 per cent of the people that they could be reaching. I also found that there is a lot of research done on big bets and where can you really drive large-scale change, but if you're a small family foundation or an individual philanthropist who doesn't have a large team, working out where and how to intervene to support this is challenging. So the question was, how could we bridge that gap? While funding organizations is one critical piece, we recognized that if we really want to shift systems, it's not going to be any one organization that will do it, so we need to collaborate.

That's the premise of Co-Impact?

Exactly. Co-Impact will do two things - one is to significantly benefit millions of people around the world by supporting efforts in education, health and economic opportunity, and the second is, through the kinds of partnerships with other efforts that exist, to try to focus more philanthropy on large-scale change.

You've assembled a remarkable coalition of foundations and philanthropists, with a planned commitment of \$500 million.

How did you bring those together?

From the exploratory stage to the launch was three years so a lot of it was about building the idea through input from many people. That was a key part of the design of Co-Impact. What I was particularly focused on was bringing together a group that would be really interested in collaborating with others to create effects on a large scale. In addition to our core partners, who will select the »



Above: Olivia Leland on a panel with Bill and Melinda Gates.

opportunities that we support, we also have the Co-Impact community, which is a much broader group of philanthropists who will support and engage with the opportunities and have a smaller financial commitment. We are also working to leverage Co-Impact's financial contributions with support from other co-investors including other philanthropies, governments, multilaterals and business.

How do you become a core partner of Co-Impact? Do you need to have the money to make a financial commitment?

Yes, but it's also about providing strategic guidance and serving on our advisory board. It's important that this group be global, so we continue to expand it. We want to highlight more examples of truly great philanthropists from around the world, and a global group brings not just wider perspectives, but also greater reach and convening power.

It is notable that you have Indian philanthropists Rohini and Nandan Nilekani as a technical partner. How will that work?

Nandan and Rohini Nilekani, along with their team at the EkStep Foundation, are doing some really exciting work around societal platforms to focus on the role of philanthropy and driving impact at scale. We are working with them to provide technical support to the initiatives in Co-Impact's portfolio. This is part of our goal to provide a full set of non-financial support across the portfolio, based on what the initiatives suggest would be most useful to them in driving towards greater results.

You'll soon be making your first grants. Can you give us a sense of what grants might be in the pipeline?

We're making three kinds of grants. The first are 'preparation stage' grants. It takes a lot of work for initiatives to build a plan for

enduring impact at system-wide scale, and to develop the kind of partnerships and support structure required. We provide some funding and technical assistance upfront to help them with this work. At the end of the preparation phase, our core partners will decide which ones to support with 'systems change' grants, and what magnitude of support to offer.

For each systems change grant, Co-Impact expects to award \$10-50 million spread over a five-year period, and also provide a variety of non-financial support. It will be very important to partner with each initiative's existing funders, as well as help to significantly advance and expand each initiative's efforts to bring in additional funding, whether from philanthropy or from multilaterals and governments. Ultimately, the goal is to improve the lives of millions through advancing education, improving people's health, and providing economic opportunity. Finally, over the course of Co-Impact's lifetime, we will make a few 'venture stage' grants, which will be roughly \$1-2 million for early stage but extraordinarily promising efforts in areas that are currently under-resourced, to help them build out and test their efforts over 2-3 years.

How many grants?

We will do several rounds of grantmaking over the next few years. For this round, I imagine it will be somewhere between two and four that are awarded the 'systems change' grants and then roughly similar numbers in each of the subsequent rounds. Ultimately, we're expecting there to be around 8-12 of these full systems change opportunities.

At the moment, we're focused on finding the opportunities. We are also focused on finding

both financial and non-financial support, so we're working with others to figure out how philanthropy can have the most impact in driving systemic change and how it can capitalize on examples and use them to identify others.

Co-Impact was incubated at The Rockefeller Foundation, where you were managing director, but you've chosen a US public charity, New Venture Fund, as the mechanism by which you distribute grants. What was your thinking?

New Venture Fund is our fiscal sponsor, which means that they receive and disburse the contributions from our donors. They also provide a lot of back office support for us in areas such as finance, human resources, and grants management.

What was behind that choice?

Two things. One is that we feel that it's very important to create an independent space where all of the core partners can have equal voice. One of our core partners uses this evocative expression, 'you don't want to feel like the pimple on the tail of the dog'. I think that's sometimes the case in philanthropy where you have these kinds of collaborations but don't feel like you are equal partners.

The second is that, rather than creating a new entity, we can build on New Venture Fund's tremendous knowledge and team and therefore be much more effective from the outset. We also have a special relationship with The Rockefeller Foundation in that it is incubating us, as you mentioned, and providing technical and strategic support, as well as covering our operations. I wear two hats in that I'm seconded to New Venture Fund as the CEO of Co-Impact and also spend a portion of my time advising The Rockefeller Foundation on collaborative philanthropy.

You've been praised for breaking new ground in large-scale, longer-term thinking, harnessing non-financial assets, bringing together peers, etc. Others, though, have suggested that your systems thinking terminology needs further exploration and doesn't change underlying structures. What's your response?

I hope we can bring actors together to create greater impact in the way we envisage. In terms of systems thinking, we've spent many months talking specifically about this. For me, the question of how we really drive systems change through philanthropy is more important than the definition. One of the things I kept hearing from people in the exploratory stage was that there's so much discussion around systems change, but where's the philanthropy to support it and learn what it takes to drive it? If we could »



We want to highlight more examples of truly great philanthropists from around the world, and a global group brings not just wider perspectives, but also greater reach and convening power.



Above: Bill and Melinda Gates with children at an Anganwadi centre in Bihar, India.

bring philanthropy together to focus on this, on what it takes to address the root causes and on making sure the different voices are heard, then that would be a good thing.

Some people might perceive an initiative led by very wealthy philanthropists as elitist. What are you doing to make sure that the initiative reflects the people that you ultimately hope to benefit?

Two things. One is in the nature of the opportunities that we support. We are looking for things which involve a coalition of actors and which bring together different voices from across all sectors. The second thing is being quite conscious of elitism. We're doing some work on engaging and getting feedback from the people that we're seeking to serve – from our grantees, of course, and also from the communities they work with – and we're exploring ways that we can make sure that we incorporate feedback throughout the work, not just in the evaluation, so that the initiatives can adapt to what they're hearing.

Some grantmakers have begun to share power by bringing people that will be affected into decision-making roles. Can you at Co-Impact one day envisage some of the world's poorest people sitting together with some of the world's richest people to make decisions or does power have to remain concentrated among the richest?

How you ensure that you are hearing the voices of those affected needs to be a focal point of philanthropy. At the same time, philanthropy alone is a small piece of the puzzle, but we are able to sit at the table with partners and part of what we aim to do is to ask them those kinds of questions.

There's a view even within philanthropy that it is the product of unjust systems. In seeking to change those systems, should philanthropy itself be subject to change?

I think this is a question that a lot of philanthropists ask themselves and I think this is a key thing that we can do – we're not going to change all the power imbalances in society, but we can and should question them and philanthropists should be part of that process. But at the same time, the key question for me is what more can philanthropy do to really drive impact? ●

Responding to challenges Riding the tiger of technological change



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Philanthropy support organizations have a vital role in ensuring that disruptive technology leads to change for the better

Technology is opening up new opportunities to empower marginalized and disenfranchised communities around the world, and new ways of addressing social and environmental challenges. On the other hand, recent news stories have highlighted the subversion of the democratic process by organizations harvesting vast amounts of data and using it to influence elections. Likewise, there is growing concern that an algorithmic decision process now governing many aspects of our lives can develop biases and thus adversely affect certain groups. How can support organizations help philanthropy and civil society to accentuate the positive elements of these developments and offset the negative ones?

The impact of the coming wave of technological disruption will be felt by Civil Society Organizations (CSOs) in three main domains: offering new ways to deliver missions, transforming organizational structures and operations, and creating new problems to address.

The first impact can already be seen in the many great examples of 'tech for good' around the world. When it

comes to the second, let's take one example, that of blockchain technology. Blockchain makes decentralization possible, which could benefit CSOs by helping them to reduce the cost and complexity of operating across geographic borders, but it could also pose a threat to traditional institutions if new forms of giving which don't require intermediaries (such as direct cash transfers) are made possible at an unprecedented scale.

Beyond their own operation, CSOs should also recognize that these trends will affect the people and communities they serve. In both cases, it is vital to engage with these issues, and to ensure civil society plays a full part in efforts to minimize the negative consequences of technological development, or where they are unavoidable, explore ways to offset them.

There are a number of immediate challenges for philanthropy and civil society. One is simply a lack of required knowledge and skills. Another is risk appetite: CSOs usually have limited resources, so it is hard to justify investing in high-risk innovations using unproven technologies.

Infrastructure organizations can help overcome these challenges. They can curate and disseminate information on the impact of technological trends. They can support the development of technology leaders within civil society. They can also act as a conduit between the technology community and CSOs, bringing the two together so that partnerships can be developed as one means of mitigating the risk of innovation.

Support organizations can also help to ensure that CSOs have a voice in the debate about the misuses and unintended consequences of new technology, by coordinating insight from front-line organizations and acting as a focal point for engagement between civil society and other key stakeholders, such as government and the technology industry.

Governments must also play their part. At the most basic level, they need to recognize the role civil society has to play in informing new policy and legislation around technology. This must be reflected in efforts to engage with CSOs, both directly and through infrastructure organizations. Governments should also factor civil society into wider industrial or technology strategies, and include civil society impact assessments in policy consultations relating to new technologies.

Infrastructure organizations can convene these different parties. At CAF, for example, we have recently launched our Future:Good campaign, which aims to bring together CSOs, government and the technology sector around a number of shared principles to ensure that the impact of new technologies is as positive as possible.

CSOs must engage with technology issues now if they are to continue to meet needs effectively in the future. It will be hard to do this without the help of infrastructure organizations. Together, they can ensure that they are able to harness the potentially transformative benefits of disruptive technologies, while also playing a key role in minimizing their downsides. ●

The infrastructure behind the infrastructure



Lucy Bernholz is a senior research scholar at Stanford University's Center on Philanthropy and Civil Society (PACS) and director of PACS' Digital Civil Society Lab.
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The digital space is the infrastructure that we all depend on. But for civil society to secure its freedom of thought and action is a major challenge

Support organizations are not the only kind of infrastructure that philanthropy and civil society depend on. Increasingly, underpinning the work of both – in fact of all organizations – is the digital technology they rely on. That brings its own problems and is something that philanthropy support organizations need to pay attention to.

Every foundation, donor, non-profit, or civic association which uses email or cell phones is digitally dependent. These organizations and the people who constitute them – staff, volunteers, board members, beneficiaries – connect to each other via software, hardware and digital infrastructure. Whenever we act out our associational, expressive, or privacy rights using digital networks, we are operating in digital spaces. The policies and regulations that govern these

domains – including software licensing, telecommunications, consumer data, privacy, intellectual property and others – and the corporate practices that shape them now dictate the where, the



In places where data plans are cheap and fast wi-fi is ubiquitous, digital expression and association happens easily, but is governed by a set of commercial actors whose primary commitment is to profit, not to human or democratic rights.

how, the who and the what of civil society, just as national and international legal frameworks, cultural and religious traditions and norms have always done.

Let me provide a few examples. Non-profits create and share documents via inexpensive (often free) cloud services, such as Google Drive. In doing so, they may (or may not be) aware that Google has full and complete access to everything written in those documents. The company's Terms of Service allow it to scan the content of those materials for Google's own purposes (selling advertising). The full and complete contents of the documents – be they board materials, internal performance reviews, strategy or fundraising plans are visible to Google. The organization is, for all intents and purposes, holding its meetings in Google's house.

Another organization, perhaps a public foundation, uses Facebook to publicize its activities, do outreach for events and raise funds. Here too, the organization has ceded control over all of the data about these

activities – who saw the information, who responded to it, who gave money – to Facebook. Everything the foundation knows about its interactions with its public and funders is also known – and stored



The organization is, for all intents and purposes, holding its meetings in Google's house.

and used – by a giant company based in California. In a third example, neighbours in an urban slum may advocate successfully for public works improvements, including sidewalks, better roads and perhaps an antenna to improve cell services in the area. What they won't know to advocate for, however, are limits on the city's use of the antennas to monitor the community, via cameras or analysis of social media exchanges. Without that understanding, the community has made a Faustian bargain – better cell signals in exchange for even closer government surveillance. And then there are rural communities, cut off from any affordable digital access. Lacking a sophisticated level of digital literacy or legal advocates on their side, they may choose the financially free infrastructure offered by a commercial company, unaware of the data privacy price they'll be paying.

In places where data plans are expensive, broadband access is non-existent and wireless service is spotty, people's ability to organize, communicate and participate is limited. This digital environment is

a barrier to a robust civil society and should be addressed as such. However, in places where data plans are cheap and fast wi-fi is ubiquitous, digital expression and association happens easily, but is governed by a set of commercial actors whose primary commitment is to profit, not to human or democratic rights. In places where technological access is easy but legal protections are few, people are living their digital expressive and associational lives under the relentless eye of government surveillance. These things, too, are barriers to free, independent civil society.

These scenarios capture the current situation in most parts of the world. Digital access is expensive and unavailable, or it is cheap and privatized, or cheap and under government surveillance. None of the scenarios is conducive to the associational, expressive and private rights that are fundamental to both civil society and philanthropy.

In the physical world, civil society is aware of the financial, contractual and accountability bonds that tie it

to the public and private sectors. Much of the policy work that civil society and philanthropic infrastructure groups do is negotiate these rules and norms. The passage of the EU's General Data Protection Regulation is a globally important step toward a policy regime that protects individual rights to association, expression and privacy. Numerous digital rights groups, each a part of civil society, played important parts in getting the rules passed. Ironically, the organizations that did this work are not generally recognized as part of the philanthropic or civil society infrastructure. Digital rights are existentially important to civil society, regardless of whether the community in question is aspiring to digital connectivity or awash in it. Now is the time to strengthen civil society's understanding and advocacy of digital rights and to recognize the role of digital rights groups as part of civil society's infrastructure. ●

Above: The digital space presents some profound challenges.

Tackling the information gap



David Bonbright is founder and CEO of Keystone Accountability. @ davidb@keystoneaccountability.org

The philanthropy sector's information infrastructure is wholly inadequate

Most discussions of philanthropy infrastructure focus on organizations. I want to focus instead on information. The first thing to say is that the way the social sector organizes information is woefully unfit for purpose.

There are three main groups involved in our sector: those meant to benefit from philanthropy and social change (the primary constituents), the implementers of efforts to create social value, and the funders. What information do each of these three groups need to make effective decisions?

Primary constituents

Let's think of them as consumers. If we reframe some of President Kennedy's special message to Congress on protecting the consumer interest¹ in 1962 for the social sector, we come up with the following:



For all these groups, transparency is imperative. This puts an important additional responsibility on funders, who are the group best placed to pay for public information infrastructure.

The right to safety: translates to the right to not being messed about by people who have no clue what they are doing. Primary constituents have a right to know the evidence underpinning the claimed benefits for the proposed intervention.

The right to be informed: comes through pretty much unchanged - to be protected against fraudulent, deceitful, or grossly misleading information.

The right to choose: though it cannot be guaranteed, the kinds of information in the two other points should form a basis for choice. Perhaps most helpful would be reliable information about the experience of service users or constituent feedback.

Implementers

Implementers need to know what results flow from their work. Similar to primary constituents, they need to understand the experience of the people whom they affect - and

can do so through constituent voice. In addition, they need information for efficient implementation, such as costs, timeliness, level of

effort and interim results - in effect, the immediate inputs and outputs.

Funders

Funders are one or more steps removed, but they still need information about results, like those directly implicated, so that they can learn and improve. With respect to feedback data, Fredrik Galtung of Integrity Action has shown that what we most need is a Fix-Rate, which he defines as the quality of implementer responses to feedback. Most importantly, only the primary constituents can say whether an implementer response is adequate.

On performance and operational indicators, funders need to know intended targets (measurable goals), and the rate at which grantees are hitting those targets. Let's call this the Hit-Rate.

For all these groups, transparency is imperative. This puts an important additional responsibility on funders, who are the group best placed to pay for public information infrastructure, such as online databases, although implementers can and should publish.

Our report card

So how well is our sector meeting its information needs? Opposite is my report card, using a 0 to 10 scale.

Sadly, we are clearly failing.

Only a handful of implementers even consider that they should be providing information on results to those they intend to help. The slightly better grade for constituent voice is only because we can see the beginnings of a recognition that it is necessary to report to constituents on the feedback that they provide.

Most implementers can't articulate their results with an acceptable degree of reliability. Most can't use their constituents' feedback to improve. The only category that receives a passing grade, the lowest possible one, is performance and operational information.

Who should fix this?

Funders must accept the lion's share of the blame for the overall state of affairs. They have responsibility to allocate resources to ensure all actors have the

information they need. They don't do that, even for themselves. Ouch!

The '2' on results recognizes that a couple of sector support organizations specializing in information - the Foundation Center in the US and 360Giving in the UK - have some solid early infrastructure for where funds are going. That's a great start.

Suppose you're a funder in the UK trying to fund, say, domestic violence, and want to look up evaluations of organizations who work in that area. Where can you go? Nowhere. In medicine, you'd go to PubMed (a searchable database of all published medical trials) and have the research you need in two seconds. In the voluntary sector, you'd struggle to find it all: hence the '2'.

Sure, there are small, early and interesting efforts to improve quality in, and access to, evaluation (creating registries, standards, for example, norms for publishing evaluations, standardized mandatory fields in evaluations such as sample size, metadata), and common funding pots. But as welcome as these are,

they are minuscule in relation to the need.

Funders would have '0' for constituent voice but for two important recent foundation collaborations - The Fund for Shared Insight in the US and the Listening Fund in the UK. Again, these efforts need to spread beyond a small handful of positive deviants.

They get a '1' for operational and performance information because we know of only a handful of funders who can provide the Hit-Rate for their fundees.

We don't have to wallow in information squalor. Surely we can set standards for publishing evaluations, constituent voice data, Fix-Rates, and Hit-Rates? An obvious place to start is with funders, who can assess

	Results	Constituent Voice	Performance & Operations	Transparency
Primary Constituents	0	1	Not applicable	Not applicable
Implementers	2	3	5	1
Funders	2	2	1	1

themselves, and publish those assessments. Once information is published, we have lots of examples of industries with standardized metadata so what is published is findable.

Solutions here need to come from the field. What if we had a campaign using social media and an open process to generate ideas, enlist commitments, and organize for actions? Such a campaign could work, but only if there were a will. So it boils down to this. Are we ready to commit to doing better and holding each other accountable for a fit-for-purpose informational basis for work in the public interest? ●

The author wishes to thank Caroline Fiennes of Giving Evidence for her contributions to this article.

¹ <https://tinyurl.com/JFK-message>

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Keeping the closing space open won't be a solo effort



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To challenge growing restrictions on civil society, philanthropy will need to work collaboratively. Infrastructure organizations should be at the fore

Philanthropy is an integral part of civil society and many foundations dedicate significant resources to ensuring an independent, active and flourishing civil society space which depends on the freedom to act and the ability to respond to trends affecting this space. However, these things are coming under increased pressure from foreign funding restrictions, unfair and complicated tax regimes, hurdles in cross-border actions and the impact of legislation on counter terrorism/money laundering. This shrinking space, as it has come to be termed, is concerning a growing number of funders¹.

Restrictions on civil society space spring from different motives: national security, economic interests, sovereignty or fear of critical voices. Sometimes even the sector itself may limit its space to operate through self-censorship or the lack of courage to act. Solutions are therefore not straightforward and require the collaboration of different sectors locally and internationally. This is where philanthropy infrastructure has a key role. Institutional philanthropy must work together to develop strategies to overcome these barriers in order to improve the environment for philanthropy and wider global civil society. They need to test out new ideas and initiatives, concrete actions and real collaboration, creating synergies instead of duplication.

The following case studies highlight the opportunities, challenges and lessons learned from working collaboratively and offer insights into how and where philanthropic infrastructure can successfully intervene.

Changing policy through dialogue – Financial Action Task Force (FATF)

In 2016, following a long collaborative process of advocacy and dialogue among actors who don't usually work together, the FATF revised one of its 40 Recommendations, number 8, which deals with the non-profit sector. This policy change and the creation of a formal dialogue

Restrictions on civil society space spring from different motives: national security, economic interests, sovereignty or fear of critical voices.

between FATF and the NPO sector reflects the success of the global NPO coalition on FATF led by four of its leading members: the Charity and Security Network, the European Center for Not-for-Profit Law, the European Foundation Centre, and the Human Security Collective, and supported by others (see www.fatfplatform.org). The four partners worked towards a clear, common

mission of policy change, which was achieved through working closely with civil society actors and helping them understand and engage around FATF also at national level.

Philanthropy collaboration and the creation of the Funders Initiative on Civil Society (FICS)

Three philanthropy networks, Ariadne, the European Foundation Centre and the International Human Rights Funders Group co-organized a workshop in Berlin in 2015 on the common agenda of challenging the closing space for civil society. It brought together different funders, civil society organizations and governments to explore ways of aligning work and moving forward, and resulted in a practical starting point for funders. Following this a number of funders set up a new initiative, the Funders Initiative on Civil Society, bringing together private philanthropy interests from around the world to help ensure that the space for civil society is free and open in a global context.

In 2017, the EFC and FICS commissioned a paper² on how restrictions on civil society affect development and humanitarian funders and actors. The paper suggests that many international foundations and INGOs are taking an 'adaptation and mitigation' approach to these constraints and that more could potentially be done, by, for example, engaging in advocacy. It is complemented by expert blogs focusing on their particular responses to the closing space in specific contexts and their work around security policy and bank de-risking.

These examples highlight the importance of working with existing and new allies, testing innovative solutions, trusting the expertise of others and above all having all parts of the ecosystem contributing to the creation of effective synergies and solutions. ●

¹ *The Shrinking Space for Civil Society: Philanthropic perspectives from across the globe.* <https://tinyurl.com/EFC-ShrinkingSpace>

² *Why Shrinking Civil Society Space Matters in International Development and Humanitarian Action* and blogs: <https://tinyurl.com/EFC-development>

Community philanthropy in the lead



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Community philanthropy should be a star player in sustainable development

The penny finally seems to have dropped: if civil society is going to be relevant and resilient over the long run, local support matters. As flows of conventional development aid decrease and more and more governments seek ways to undermine NGOs by questioning their legitimacy if they receive external funding, the importance of having a local base of donors is becoming clear.

New forms of participatory giving are emerging, particularly in countries that were previously net recipients of aid. This is happening both among middle classes with disposable income and an emerging social conscience (think #GivingTuesday), and less well-off communities where systems of giving and solidarity have long existed but are being reimagined and organized in new ways that build power and agency at the grassroots level (such as the Kenya Community Development Foundation's network of community funds).

Community philanthropy has undoubtedly gained greater recognition as key to an effective development system both as a *form of* and a *force for* building inclusive, democratic societies. Over the past 20 years, as the global field of community philanthropy has emerged, philanthropy development and support organizations and networks have played an important role in strengthening practice, identity and a collective voice. CAF Russia and ARC in Romania,

for instance, have been instrumental in the growth of community foundations and Prospera has performed a similar role among women's funds. But it needs to be taken more seriously by other, bigger actors in the philanthropy

When the world is struggling with migration, economic crisis and climate change, and the rise of populist anti-minority politics that appeal to people who feel ignored, funding strategies that put people, their agency and their resources at their centre are more important than ever.

and development space and, here again, support organizations have a vital role.

Too often, community philanthropy has played second fiddle in the larger philanthropy discourse, the 'poor cousin' of private foundations, which dabbles at the margins of social change and deals in small resources with community-level partners. In the decades of attempts by big development agencies to achieve lasting and locally-owned change, community philanthropy is almost

entirely absent as either a theory or a practice.

And yet, when the world is struggling with migration, economic crisis and climate change, and the rise of populist anti-minority politics that appeal to people who feel ignored, funding strategies that put people, their agency and their resources at their centre are more important than ever. It is the work of building trust and changing attitudes at the very local level that is both critically important and beyond the capability of most funders.

Within the community philanthropy field we have seen the emergence of the #ShiftThePower hashtag as an extremely effective way to foster a sense of shared purpose among diverse, trail-blazing and often geographically scattered organizations. It has opened new kinds of partnerships and alliances with others advocating for more equitable approaches to development. It has also marked an important shift from earlier preoccupations in the community philanthropy field with precise definitions of institutional forms which at times constrained the creation of broader alliances and networks.

Despite this new energy and connectedness, however, community philanthropy is still young and often fragile. It needs assistance and that assistance can and should come from philanthropy's infrastructure organizations. They have the reach and resources to connect community philanthropy organizations with larger funders and development agencies, to showcase what they can offer to philanthropy and development and to persuade the bigger fish that it's time for community philanthropy organizations to come from the fringes to the centre. As the authors of *The Spirit Level*¹ argue, a more equal and equitable society is good for everyone: it is time for big philanthropy – and its networks and support organizations – to embrace its poor cousins as equal allies in larger efforts to effect lasting social change. ●

¹ Pickett, K. and Wilkinson, R. (2010) *The Spirit Level: Why More Equal Societies Almost Always Do Better*, Penguin Books.



How Great Philanthropists Failed and You Can Succeed at Protecting Your Legacy

Martin Morse Wooster



Reviewed by
Michael Alberg-Seberich

This is the fourth edition of a book that in the past had the title *The Great Philanthropists and the Problem of 'Donor Intent'*.

Martin Morse Wooster explores the perceived deviations from the intentions of donors by presenting nine case studies, from Rockefeller to Packard, on how donors, in his interpretation, 'failed' in establishing their philanthropic legacy. These 'failures' are followed by five supposedly successful examples, from the JM Foundation to the Hilton Foundation.

I found reading this book a cause of irritation. This was not because of the research presented by Wooster or the many, detailed, entertaining anecdotes about entrepreneurs and donors. Rather it was the insistent political undertone and rather one-sided interpretation of success and failure in philanthropy. One example was the explanation of 'social justice' as 'often a euphemism for government wealth redistribution' in the case study on Carnegie. Equally grating was the criticism of climate change initiatives of foundations like Pew and Packard. In Wooster's interpretation, these are all

divergences from conservative donor intent to liberal action. Is the world really this black and white in philanthropy? It is stunning how the polarization of American society is reflected in this book.

Wooster does not really address the cases of absurd, outdated or over-detailed donor intent. For example, a Swiss foundation stating its purpose as providing the nuns and priest of the local Cistercian Monastery with one Schoggi chocolate egg filled with 300g of candies each Easter, or the Johanna Margaretha Eding Testament Foundation in Hamburg which was supposed to provide warm underwear for retired household matrons since 1762. There is a need for flexibility in the interpretation of donor intent as times and people change.

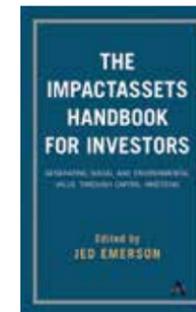
Wooster provides a concise summary of the legal principles behind donor intent, like the 'dead hand' (mortmain) challenge in philanthropy. But I would contest his interpretation of the ideal application of such principles in legal practice and also his criticism of many courts in interpreting donor intent. I find it of help that, for instance, in the German discourse on donor intent, there is growing concern with the foundation as a social and cultural phenomenon which cannot only be seen on the basis of legal principles. These societal measures, especially in a democracy, are crucial to the future legitimacy of philanthropy.

In the end I actually discovered common ground with Wooster, notably his call for spend-down foundations or sunset provisions. Why? Because it allows donor intent and action now, but also because some global challenges are too urgent for us to wait until we have reached eternity. ●

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The ImpactAssets Handbook for Investors: Generating social and environmental value through capital investing

Edited by Jed Emerson



Reviewed by
Philo Alto

Jed Emerson's third book provides both a practitioner's toolkit to impact investing and builds a compelling case for why investors should align their capital with their values and purpose for the creation of a more just, sustainable society and planet. The book is a timely resource for asset owners, investment advisers and those generally interested in the state of impact investing as it approaches mainstream.

Emerson's first book, co-authored with Antony Bugg-Levine, *Impact Investing: Transforming how we make money while making a difference*, focused on the transformative role of impact investing in mobilizing capital for social value, and the second, co-authored with Cathy Clark and Ben Thornley, *The Impact Investor: Lessons in leadership and strategy for collaborative capitalism*, honed in on impact investing from both a practitioner's perspective and as an approach for collaborative capitalism.

For this handbook, the editor assembled 12 chapters from thought leaders and practitioners across the different dimensions of impact investing, philanthropy and impact

measurement. At the same time, Emerson has also made it easy for readers with limited time to jump right into those chapters that have immediate relevance without compromising the overall flow, conciseness and tone of the book.

What I particularly liked about the book is its clarity on the needs of its different readers, deftly identifying cross-cutting themes without oversimplifying across different contexts. Case studies of impact investors are also provided to inspire readers on the variety of 'impact triggers' and the differing nature of the impacts they seek to create within their investment strategy and risk-return-impact goals.

While the book more than lives up to its billing as a handbook for impact investors, its subtitle, 'Generating social and environmental value through capital investing', does not adequately reflect the inclusion of chapters that broaden the notion of impact investing beyond capital investing. Chapters such as 'Transformational Giving: Philanthropy as an investment in change', 'Communicating Impact: Frameworks for messaging', and

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'A Journey to Impact: Initial steps towards impact investing' clearly signal that, beyond focusing on tools currently available including philanthropy and impact investing, creating positive social and environmental impacts requires a deeper understanding of one's own purpose and intended impacts.

Emerson has expertly navigated the balance across the different dimensions of impact investing without making it too technical for either novice or practitioner. However, I was hoping to read more about how impact investing can be framed within the lens of the recently-adopted Sustainable Development Goals (SDGs). In their *Impact Investor* book, co-authors Emerson, Clark, and Thornley have highlighted how collaborative capitalism can catalyse the development of impact investing via cross-sector or 'multi-lingual' collaborative leadership. And to some extent SDG 17: Partnerships for the Goals presents an opportunity for different stakeholders in impact investing to anchor their respective impact goals within the SDG framing. This could perhaps be a useful addition to a second edition of this handbook.

Overall, the book is an essential, highly readable primer on impact investing that delivers more than its 'handbook' label suggests. It also takes readers on an introspective learning journey about what it takes to create, communicate and measure intended social and environmental impacts when deploying their philanthropic resources. ●



WINGS meeting gathers infrastructure funders in Barcelona

Charles Keidan reports

Why won't foundations pay more, or in some cases, pay anything, for the infrastructure which exists to help them? And what can be done to change that?

That was the core challenge debated at the WINGS meeting in Barcelona. Hosted at the magnificent La Caixa Forum building on 26-27 March 2018, the event brought together around 60 practitioners from across the philanthropy ecosystem.

The meeting was billed as a gathering for funders. Representatives from Russia's Vladimir Potanin Foundation, France's Daniel and Nina Carasso Foundation, and Michigan's Mott Foundation rubbed shoulders with colleagues from OSF and Ford Foundation as well as an assortment of other foundations, infrastructure bodies, philanthropy advisers, European officials and Olga

Alexeeva memorial prize finalists and other interested parties.

The meeting succeeded in deconstructing 'philanthropy infrastructure', helping to make the questions concerning its growth and development easier to understand, more concrete, and more immediate. As European Foundation Centre CEO, Gerry Salole, put it: 'Infrastructure for philanthropy is rather more like a skeleton than scaffolding. You need it all the time and, unlike scaffolding, you can't dispense with it.'

The WINGS meeting was also notable for its attempt to show, rather than tell, participants the impact of infrastructure on the development of philanthropy worldwide. As if to prove that point, a poster session showcased a selection of case studies. Among these were the Associata Pentru Relatii Comunitare (ARC) in Romania which highlighted the growth of local community assets and

the creation of 16 community foundations serving almost half of the country's population.

While the gathering reflected an increasing confidence, long-standing frustrations about a lack of resources were on show. One practitioner asked, maybe only half in jest, whether support organizations should go on strike if foundations won't fund them. More than one participant called on foundations to pay an infrastructure tax – a tiny percentage of their annual spending – to benefit the whole field.

Although striking and taxes may be fanciful, it's not yet clear whether the vexed question of who should pay for the infrastructure on which philanthropy depends has been fully resolved. But this gathering may prove to be an important milestone along the way.

<https://tinyurl.com/alliance-conference-report>

Dates for your diary



United Philanthropy Forum Annual Conference
16-18 July 2018
Boston, US



Philanthropy for Better Cities
Hong Kong Jockey Club Charities Trust
20-21 September
Hong Kong

Philanthropy Australia
4-6 September
Melbourne, Australia

LOOKING AHEAD...



Guest editors:
Yunus Sola and Tariq Cheema

World Congress of Muslim Philanthropists

September 2018

Muslim philanthropy

Muslims comprise almost a quarter of the world's population. As such, how, where and to whom Muslims give is of great societal significance. While systematic knowledge of Muslim and Muslim-inspired philanthropy remains limited, this special feature aims to illuminate its scope, potential and effects on contemporary society.



Coming up in Alliance extra...



- In-depth coverage of the Asian Venture Philanthropy Network in Singapore
- Nora Lester Murad on Jewish philanthropy and the Israeli-Palestinian conflict
- Emily Hurley and Andrew Milner on LGBT philanthropy

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