

A string of international flags hangs from a building facade, with a blue semi-transparent box overlaid on the lower left. The flags include the United States, Ireland, France, Germany, and others. The background is a blurred street scene.

## The Thoughtful Funder's Guide to Global Giving:

Powerful practices and lessons learned  
from funders working on water,  
refugees, and women and girls



Act boldly. Give wisely.

# The Philanthropic Initiative

The Philanthropic Initiative (TPI) is a global philanthropic consulting practice that helps foundations, families, companies, and individual donors develop and execute customized strategies to increase the impact of their giving and achieve philanthropy that is more strategic, effective, and fulfilling. For 30 years, TPI has served as consultant and thought partner to ambitious donors and funders who embrace innovative thinking in their efforts to find local, national, and global levers of change.

TPI is committed to actively promoting and advancing strategic philanthropy by conducting cutting-edge research, publishing donor education resources, and training individuals, organizations, and advisors in best practices. In 2010, TPI established its Center for Global Philanthropy with a mission to promote and increase effective international philanthropy that strengthens local organizations and positively transforms lives and communities around the globe. Our promotional work informs our advising work to the benefit of our clients and the global philanthropic community.

TPI operates nationally and globally, and is housed at the Boston Foundation.

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The C.S. Mott Foundation was founded in 1926 to inspire and empower individuals to work with their communities in ways that will help them achieve more than they could ever accomplish alone. In each of its program areas — Civil Society, Education, Environment, and Flint Area — the Mott Foundation envisions a world in which each individual's quality of life is connected to the well-being of the community, both locally and globally. To learn more, visit [mott.org](http://mott.org).

The W.K. Kellogg Foundation (WKKF), founded in 1930 as an independent, private foundation by breakfast cereal innovator and entrepreneur Will Keith Kellogg, is among the largest philanthropic foundations in the United States. Guided by the belief that all children should have an equal opportunity to thrive, WKKF works with communities to create conditions for vulnerable children so they can realize their full potential in school, work, and life.

The Kellogg Foundation is based in Battle Creek, Michigan, and works throughout the United States and internationally, as well as with sovereign tribes. Special emphasis is paid to priority places where there are high concentrations of poverty and where children face significant barriers to success. WKKF priority places in the US are in Michigan, Mississippi, New Mexico, and New Orleans; and internationally, are in Mexico and Haiti. To learn more, visit [www.wkkf.org](http://www.wkkf.org) or follow WKKF on Twitter at [@wk\\_kellogg\\_fdn](https://twitter.com/wk_kellogg_fdn).





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# Introduction

The world has quickly become connected in ways never experienced before. Intercontinental travel is readily available; technology keeps us constantly connected to friends, loved ones, and acquaintances; and the media exposes us daily to news from around the world. People increasingly visit parts of the world they previously could not have imagined seeing, introducing them firsthand to cultures and communities in other places, as well as to the day-to-day challenges faced in every part of the world.

There is an improved understanding of the interrelated nature of global social, economic, and environmental issues, and cross-border philanthropy has increased in response. International giving from US foundations increased 29 percent between 2011 and 2015<sup>1</sup>, and it continues to rise. Recognizing that issues that cross national borders are among the most critical issues of our time, funders are often giving both in their local communities and abroad. They recognize that “global giving” doesn’t mean “out there, not here”, but that giving, wherever it may occur, connects the internal with the external, the local with the global.<sup>2</sup> A 2017 study conducted by the Council on Foundations and Foundation Center found that grant dollars for international giving from large US-based community foundations had risen from \$103 million in 2011 to \$223 million in 2014.<sup>3</sup> Philanthropy is rising in countries outside of the US as well. Institutional philanthropy and the number of foundations are increasing in every region of the world, alongside a steady rise in individual<sup>4</sup> and community-based philanthropy worldwide.<sup>5</sup> While data on the philanthropic sector in countries outside of North America and Europe are scarce, a recent study identified a total of 260,358 foundations in 38 countries, representing assets that exceed \$1.5 trillion.<sup>6</sup>

Companies have also increased their global presence and have expanded their philanthropy. Corporate giving rose by eight percent in 2017 to \$20.77 billion. This rise is tied to an increased focus on developing philanthropic strategies that encompass mission, values, goals, and interests of employees.<sup>7</sup> Companies also feel an increased responsibility to be good global citizens in addition to having strong financial returns.<sup>8</sup> Through thoughtful philanthropic strategies, companies are improving their reputations and

brands while also attracting and retaining employees who find more satisfaction knowing their companies are giving back to the communities around the world where they operate.

International funders report that their giving is accomplishing more than what might be possible if they gave only in the US. They see evidence that their philanthropy is changing lives. By giving across borders, they are alleviating extreme poverty, rebuilding after disasters, championing human rights, promoting global health, and supporting humanitarian responses. People are also realizing that problems affecting far-off communities may be faced by their own neighbors at home. For example, more than 844 million people globally lack access to safe drinking water, and while the problem is most acute in developing countries, the water crisis in Flint, Michigan helped to expose the fact that people in over 1,000 rural towns across the US<sup>9</sup> lack access to safe, clean water.

Understanding the interconnected factors at play in addressing critical global issues can help funders identify effective philanthropic approaches at home and abroad, and funders can learn by sharing both successes and failures in addressing complex challenges. Whether giving locally or globally, funders want to have an impact and to know their philanthropy is making a meaningful difference. Some common questions that funders of all types and sizes often ask when trying to increase the impact of their philanthropy include:

- How can we give effectively and responsibly in cultures and geographies that are not our own?
- How can our philanthropy or foundation make a difference on such a huge issue?

- What is the best entry point or strategy to tackle an issue?
- How are other funders approaching this issue and what are the opportunities to collaborate?
- What are the most effective ways to work with grantees as true partners?
- How can we leverage our philanthropic resources further to catalyze significant and sustainable change?

There are a variety of ways funders can work to answer these questions, but knowing where to begin is not always easy. Directing philanthropic resources in meaningful ways requires a strategic approach, which often begins with determining one or more issues, populations, or geographies on which to focus one's giving. Focusing philanthropic efforts can be both exciting and challenging, and the next step of becoming educated can feel downright daunting. This is especially true when giving across borders, since many issues are interconnected and affect multiple communities and populations in countries around the world. Learning about such issues – why they might exist in the first place, who or what they affect, who is trying to address them and how – can be challenging to small and large funders alike.

With this report, The Philanthropic Initiative (TPI) set out to share knowledge and to equip donors of all types and sizes, from the private and corporate sectors, to determine how they might use philanthropy to address three issue areas currently affecting millions of people around the world:

- I. Increasing access to clean, safe water**
- II. Addressing the global refugee response crisis**
- III. Improving conditions for women and girls**

In considering all of the challenges global philanthropists are addressing with their funding and all of the populations they are supporting, these three issues and populations emerged as areas that provide unique opportunities for impact both locally and globally. Each of these areas speak to the current global context and has benefited from innovation and collaborative funding strategies, but still has great need and opportunities where philanthropy can make a difference.

This publication was developed using in-depth research, TPI's 30 years of experience supporting funders giving across borders, and interviews with experts in philanthropy and the nonprofit sector with extensive expertise working to increase access to clean and safe water, address the global refugee response crisis, and support women and girls. The first section, *Powerful Practices of Thoughtful Funders*, highlights promising practices that apply across all three issue areas. The following sections provide an overview of each of the three areas of focus, an understanding of the challenges funders face and the current state of philanthropy in each area, different strategies to address these challenges, key lessons funders have learned, and ways to collaborate with other funders. As funders consider working on a new issue or in a new geography, or desire to better understand areas in which they are already working, the type of landscape scans conducted to produce this report provide a useful framework that can be applied to other issues as well.

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Whether you are a funder just starting to think about giving internationally or one who has been doing so for years, whether you have no knowledge of these issues and populations or consider yourself already an expert, whether you give in the thousands or millions, you can use this report to learn more about ways in which philanthropy can address issues that seem overwhelming, and how to effectively collaborate in the process. The philanthropic challenges, strategies, and lessons shared throughout the publication can be applied to a multitude of other global issues, and our hope is that all funders can use this resource in their journeys to increase the impact of their philanthropy around the world.

# POWERFUL PRACTICES OF THOUGHTFUL FUNDERS

At its core, philanthropy remains true to its origins from the Greek word *philanthropia*, which simply means love of humanity. Philanthropists and funders today may have many motivations for their giving, but most share an innate desire to improve the world in which we live for generations to come.

The practice of philanthropy has changed significantly over time, making notable strides in recent decades. International philanthropy is on the rise, helping to address global issues and creating much-needed positive change around the world. Funders are grappling with questions of how to achieve greater impact with their giving, and how to best create sustainable solutions that address root causes. Global philanthropy today has an increased emphasis on relationships, scale, sustainability, impact, and addressing inequities. While the field of philanthropy continues to have its challenges, many funders have become more nimble, responsive, transparent, open to innovative approaches, and eager to collaborate with others. Both challenges and opportunities can be amplified when working with partners in other countries. Through creativity and collaboration, funders are finding ways to overcome barriers and design more effective approaches.

Through the research conducted for this report as well as TPI's decades of work supporting all kinds of funders, we have identified powerful practices of thoughtful funders. These practices are relevant to philanthropy regardless of location, but can be especially important for those giving across borders. The practices outlined below are not new ideas, as the philanthropy and nonprofit fields have been grappling with these themes for decades. However, funders are becoming increasingly sophisticated in their approaches, recognizing the need for improved collaboration and systemic approaches for real and lasting change to occur.

## Build Authentic Funder-Grantee Relationships

Although philanthropy has exploded as a field and has grown and evolved in the last 100 years, challenges remain. Power dynamics between funders and grantees influence virtually every interaction. By acknowledging the power and privilege that comes with their role, funders can take steps toward developing authentic relationships with grantees based on trust and transparency. Cultural and language barriers are

especially difficult to navigate when giving across borders. Increasingly, funders recognize that relationship-building takes time and requires them to act with humility, ask good questions, encourage grantees to share their viewpoints and experiences, and consider grantees as true partners rather than simply recipients of funds or ideas.

Many funders have tried to become grantee-centric, prioritizing their grantees' needs over their own, or trying to structure their grants in ways that are easier for grantees to accept and use effectively. In some cases, funders have incorporated an intentionally integrated approach in which recipient non-governmental organizations (NGOs) and community members are directly involved in making decisions about allocation of grant funds. A recent Foundation Center publication, "Deciding Together: Shifting Power and Resources through Participatory Grantmaking," profiles several US foundations that use a participatory approach to help address this power imbalance. In some cases, funders support community-based philanthropy vehicles so funding decisions are made or informed by individuals who understand the local context and are based in the community; the growth of community foundations in the US and around the world is one example of this trend.

By acknowledging the power and privilege that comes with their role, funders can take steps toward developing authentic partnership relationships with grantees based on trust and transparency.

## Fund Grassroots Organizations and Social Movements

Funders are also addressing the power dynamic present in philanthropy by finding new ways to support community-

based and grassroots organizations. The frequent mantra inherent in this approach is “nothing about us without us” – the idea that the voices of those most affected by an issue need to be a key part of the process. Funders are increasingly willing to navigate the challenging environment of international regulations and long-distance relationships to directly connect with national, regional, and community-based organizations that work on issues where grant recipients live. Many funders take a dual approach, providing some grants to international organizations that can scale their work quickly and respond to emergencies, while also seeking out smaller organizations to support directly. Large international non-governmental organizations (INGOs) have also been shifting their approach to invest in local organizations and leadership.

There is also increased support for community organizing efforts led by people from communities and regions where funders want to address needs or inequities. Social movements around the world have proven powerful tools for change. Harmful laws or cultural norms that prevent positive social change are most successfully overturned by

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the mobilization and voices of people in that country or region. More and more funders recognize the strength in this approach and are finding creative ways to invest in local leaders and foster these kinds of social movements. Approaches include access to flexible or quick-turnaround funding to allow activists to seize opportunities, support for networks that link activists in one country or region to others working on similar issues around the world, and grants that offer access to specialized training such as communications or digital security, particularly in situations where activists have come under threat from their government. The international

community can play an important role in helping to raise awareness and shine a spotlight on human rights abuses, humanitarian crises, and other issues, but only by working in partnership with local individuals and organizations. It is critical to work with partners that understand the local context, otherwise international actors can unknowingly create more harm to the local situation.

### **Provide Flexibility in Funding and Reporting**

As philanthropy has evolved, funders increasingly recognize that organizations need different types of support at different stages in their development. By providing more flexible funds accompanied with a clear focus on results, they can help to build the capacity of nonprofit organizations, scale important models and approaches, and facilitate quick responses to time-sensitive opportunities. More flexible and longer-term funding can help to strengthen the capacity of nonprofits for greater success in the future. Small nonprofit organizations may not have the same financial and operational structures in place as their larger counterparts, and requirements for nonprofits may not be the same in other countries as they are in the US. To address this issue, some funders provide capacity development grants to smaller organizations. Such grants allow these organizations to build their internal expertise or systems, and can set them up to be better prepared to receive larger grants in the future. Additionally, grants that provide flexible and multi-year funding can enable organizations to further progress towards strategic objectives, initiate special projects and opportunistic initiatives, address unexpected pressing needs, or build internal capacity.

Some funders are also seeking to be more flexible in the grant report process by allowing grantees to either create brief reports that are in a format the grantee chooses, or provide a report the grantee has already generated for another funder. Either approach requires less administrative time for the grantee and helps avoid the need to duplicate administrative work in addressing the needs of multiple funders. Ultimately, evaluations and progress reports can help organizations garner learnings for their improvement while also enabling the funder to understand how philanthropic resources are making a difference and improve funding strategies over time. Funders also find it useful to complement brief written reports with conversations when feasible, allowing the funder and the grantee to reflect together on challenges and impact while building stronger and more transparent relationships.

## Foster Collaboration

Collaboration among funders, while sometimes difficult to put into practice, can lead to greater social impact. For smaller donors and family foundations who often wonder how their giving can make a difference, collaboration with other funders can provide shared knowledge and resources. By consulting with others who have a stronger presence or relationships on the ground, funders can learn from existing successes and failures. In addition, funders who give in other countries benefit from hearing how others are navigating the increasingly restrictive NGO laws and rising pressure on civil society in some countries that can make grantmaking difficult. Affinity groups, giving circles, and the Sustainable Development Goals (SDGs) can provide useful frameworks for donors to find each other to collaborate. “The 17 SDGs were adopted by all United Nations Member States in 2015, and provide a call for action by all countries - developed and developing - in a global partnership to achieve peace and prosperity for people and the planet, now and into the future”<sup>10</sup> Companies, donors, governments, and implementing organizations can identify

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and collaborate with partners working on one or more of the 17 SDGs through platforms such as [sdgfunders.org](http://sdgfunders.org) and [unglobalcompact.org](http://unglobalcompact.org). The [sdgfunders.org](http://sdgfunders.org) platform, for example, can help small and large foundations alike access useful country-specific information, locate allies within a country’s development system, build stronger relationships with partners and find good entry points for grantmaking,

# SUSTAINABLE DEVELOPMENT GOALS



convene more purposefully to share strategies with funders of all sizes, and track progress.

### Balance Scale, Sustainability, and Impact

Some funders, frustrated by the slow pace of progress on international issues, seek to prioritize the concepts of scale, sustainability, and impact. One approach is to identify a strong local solution, invest in creating a sustainable and high-impact model, develop the human capital to lead it, and then scale it in an effort to achieve widespread and lasting impact. In recent years, larger institutional funders and other donors have begun to engage in “big bet” philanthropy, identifying new, innovative solutions to problems and making large investments in the social entrepreneurs who develop them. This tactic often aims to scale a localized innovative approach into a global movement or model. The innovators behind these approaches either lead nonprofit organizations or engage in for-profit ventures that have a social impact – or create a hybrid model of both.

The need to scale social change has also led to a debate within the field, as funders grapple with how to both localize issues and at the same time achieve widespread impact. Some funders choose one approach or the other, while others work in the middle by supporting locally driven approaches while

In the right circumstances, philanthropic strategies embrace a balance of the three objectives of scale, sustainability, and impact, recognizing that sustainability requires local engagement, strong leadership, and an incremental approach.

also looking for ways to scale effective efforts. In the right circumstances, philanthropic strategies embrace a balance of the three objectives of scale, sustainability, and impact, recognizing that sustainability requires local engagement, strong leadership, and an incremental approach.

### Deploy Additional Assets

In recent years, funders have increased the use of investment strategies beyond traditional grantmaking to deploy more capital for social good and support market-based, sustainable strategies to move the needle on societal and environmental issues. For example, while foundations typically use just five percent of their endowments for grantmaking, trustees

are now considering how they can use the other 95 percent to support – or at least not undermine – their missions. More and more funders are investing a portion of their endowments in socially-minded investments, and a few are going all in on 100% of their assets.

Often called impact investing or mission-aligned investing, this quickly growing field promotes the use of private investment capital to expand upon, support, or complement philanthropic approaches to social change. Funders can choose to invest in single enterprises that may be critical to developing a new technology, marketplace, or geography, or they can invest in funds that have been set up by nonprofit or for-profit intermediaries to address specific thematic issues such as energy efficiency, access to basic services, or the circular economy. They can focus on investments that earn market-rate returns, or invest across the returns continuum, earning lower financial returns, taking on higher risk, or invest for a longer time in order to achieve greater social or environmental impact. The Omidyar Network’s frameworks on impact investing across the returns continuum illustrate how smart impact investments can accomplish such goals as supporting basic infrastructure, market innovators, or market scalers, thereby laying the groundwork for additional investments from others.<sup>11</sup> While the field of impact investing is still nascent, more players are getting involved, more funds are being created, and the sector is growing, enabling funders of all kinds to invest their financial resources in alignment with their values.



## KEY ISSUES IN GLOBAL PHILANTHROPY

The philanthropic challenges, strategies, and lessons learned that are shared throughout this report can be applied to a multitude of other global issues. Our hope is that all funders can use this resource in their journey to achieving meaningful, strategic, high-impact philanthropy around the world.

Lessons learned in global philanthropy are guiding funders to work across sectors and collaborate to address three challenging but crucial issues:

1. INCREASING ACCESS TO CLEAN, SAFE WATER
2. ADDRESSING THE GLOBAL REFUGEE RESPONSE CRISIS
3. IMPROVING CONDITIONS FOR WOMEN AND GIRLS

The following sections are designed to serve as independent resources for funders who wish to direct philanthropic efforts to increase access to clean and safe water, address the global refugee response crisis, or support women and girls.

## I. Increasing Access to Clean, Safe Water

### Overview

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The need for clean, safe water is universal and essential. Yet, 844 million people in the world – a staggering 1 in 9 – lack access to it, and 2.1 billion people live without readily available sanitation.<sup>12</sup> According to a report by the World Economic Forum, the global water crisis is among the top five highest global risks to society.<sup>13</sup>

Water crises affect economies of all sizes, and what manifests itself as a regional or local crisis quickly becomes a global problem. Half of the world's largest cities experience water scarcity. Two-thirds of people face seasonal or annual water stress. Climate change, an increase in population size, and agricultural demands will only worsen the global water crisis. If current trends continue, demand is expected to outstrip supply by 40% within 15 years.<sup>14</sup>

Water quality can be affected by naturally occurring materials like fluoride and arsenic, as well as by microbial contamination from human and animal feces. Access to clean water is closely connected to issues of sanitation and hygiene; therefore, experts in this sector often use the acronym of WASH – Water, Sanitation, and Hygiene. Like water, toilets are critical for health and sanitation, as they prevent the spread of disease and provide health, privacy, and safety. Yet 2.3 billion people lack access to toilets or latrines, and 946 million people still practice open defecation.<sup>15</sup>

Diseases caused by unsafe drinking water and inadequate sanitation remain humanity's most serious public health threat, causing 80 percent of sicknesses in developing countries and annually killing between two and five million people, mainly young children.<sup>16</sup> The effects of water and sanitation crises are far-reaching, with implications for education, economic development, health, food security, and women's empowerment. Inadequate WASH reinforces poverty by undermining health, education, and productivity efforts. An estimated 842,000-882,000 people die annually from diarrhea as a result of unsafe drinking water, sanitation, and hand hygiene, and more than one-third of these are children under the age of five.

At the same time, an estimated \$260 billion in annual economic losses are associated with inadequate water supply and sanitation.<sup>17</sup>

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Lack of water and sanitation facilities also has an inordinate effect on women and girls, who are overwhelmingly responsible for providing water globally. This consumes time and energy that prevents girls from attending school and women from pursuing work outside of the home. Paths to water sources are long and often remote, putting women and girls at risk of violence on a daily basis. Girls in particular have unique sanitation needs that impact their ability to stay in school, and these needs cannot be met without safe, clean water and sanitation services.

Access to safe and clean water is truly a global issue affecting every country and town. In the United States, investment in drinking water has been inadequate for decades and will continue to be underfunded without significant changes while the revenue generated will fall short as needs grow. According to the American Water Works Association, upgrading existing water systems and meeting the drinking water infrastructure needs of a growing population will require at least \$1 trillion.<sup>18</sup> The quality and safety of drinking water is eroded by contamination, lack of safe infrastructure, and increased disasters.



#### CHALLENGES TO FUNDERS:

- Involving local government, civil society, and the local community is a challenging key to success
- Listening to the needs of those most affected by the issue – before acting – requires patience
- Solutions must be sustainable and plan far beyond initial investments in infrastructure, which are only the first step
- Partnerships with governments, businesses, nonprofits, and other philanthropists are necessary but difficult to build and maintain



## Challenges to Funders

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Given the universal need for clean, safe water, funders in this space are faced with providing solutions not just to finite populations but also potentially to huge groups of people across the world at any given time.

Development aid and philanthropy for WASH has historically focused on building initial infrastructure to establish clean water and sanitation services, without sufficient attention given to how these services would be maintained over time by the local community. There are very few examples of WASH systems that serve the neediest populations and function effectively long-term. The cost of water can be prohibitive even with the most innovative social enterprises, and it is a continuous struggle to develop systems that will be affordable to those in the lowest income brackets. At present, 30-50% of WASH operations fail after two to five years, highlighting the need for a focus on long-term investment and infrastructure sustainability.<sup>19</sup> Yet WASH funders warn against the allure of innovation. Although funding something new and creative is appealing, funders should ask: is this better than what the population served has already? If it is not better – simply newer – then funding such a project may not move the field forward. Funders are recognizing the need to place greater emphasis on achieving sustainability by supporting maintenance systems that are managed by local communities.

Key lessons for funders include the need for local ownership and the importance of involving local government, civil society, financial institutions and the community in all phases of planning and implementation. According to Sarah Hedley of the Stone Family Foundation, a significant lesson learned by actors working in WASH is, “It is not about digging more wells, it’s about service and operational models and accountability structures.”<sup>20</sup> Sustainable solutions require partnerships across sectors through the engagement of government, business, financial institutions, nonprofits, and private philanthropy. Such partnerships, while critical, are neither easy to establish nor to maintain. In addition, WASH efforts often span multiple governmental ministries, demonstrating the need for strong, centralized, and local government leadership on the issue.<sup>21</sup>

Although offering creative support options (technical, financial, administrative) can be helpful to grantees, effective WASH funders are also attentive to their grantees’ needs, which may contradict their own assumptions of those needs. Grantees may welcome technical or other expertise, but also may feel pressure to accept this support if it comes from an important funder. As with most areas of philanthropy, funders who listen to those most affected are more likely to address issues effectively.



## Current State of Philanthropy

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Funders value the Sustainable Development Goals (SDGs) as a way to frame the combined landscape of philanthropic efforts and that of implementing NGOs. For WASH funders, SDG 6 is designed to “ensure availability and sustainable management of water and sanitation for all,” and provides guidance for their efforts. SDG 6’s targets include a variety of smaller goals, including, “achieve universal and equitable access to safe and affordable drinking water for all” and “achieve access to adequate and equitable sanitation and hygiene for all and end open defecation,”<sup>22</sup> paying special attention to the needs of women and girls and those in vulnerable situations by 2030.”<sup>23</sup> Targets also include reducing pollution and dumping of garbage into water systems, increasing water-use efficiency, protecting water-related ecosystems, expanding international cooperation and capacity-building support for developing countries, and supporting the participation of local communities in improving water and sanitation management. A big issue and focus of the sector is on financing SDG 6, with proven models to drive top-down and bottom-up finance.

Of governmental funding for water and sanitation around the world, \$8 billion of the \$10 billion total in 2014 came from the member countries of the Organisation for Economic Co-operation and Development (OECD). Private philanthropy’s contributions to WASH efforts totaled only \$134.9 million, or 0.74 percent of total WASH giving.<sup>24</sup> Although a significant sum, private philanthropy is often described as a “drop in the bucket” compared to bilateral and multilateral funding. However, private philanthropy can also fill important gaps and fund early stage innovative ideas to develop “proof of concept” and attract government funding.

## Philanthropic Strategies

### Invest in a Long-Term Future

For WASH funders, the importance of thinking about long-term infrastructure cannot be stressed enough. To understand the impact of an initial investment five, ten, and fifty years from now, funders should ask: Who will maintain water delivery systems such as pumps? Where will the equipment for maintenance come from? How will these workers be trained and paid? At the same time that funders consider these long-term questions, it is also useful to have an exit strategy in mind. As the One Foundation explains, funders should figure how to run their philanthropy support out of business by creating self-sustaining models.<sup>25</sup>

### Partner with Government

Philanthropic support for WASH typically involves one of a few strategies, and woven into each is the understanding that local and federal governments are crucial partners for success. Government agencies will be the largest and most consistent source of funding for WASH efforts long-term. They will serve as the regulators for systems put in place, and they ultimately will be responsible for long-term maintenance and upkeep.

### Fund Sanitation and Hygiene

Sanitation and hygiene requires increased philanthropic attention, yet there is often an aversion to talking about defecation. With the establishment of the SDG 6, however, WASH funders, NGOs, and government actors realized more focus was needed on the sustainability of toilets and other sanitation concerns. As NGOs moved in this direction, private philanthropy has started to follow suit. Brian Arbogast from the Bill & Melinda Gates Foundation emphasizes the importance of this path: “If you can provide a community with great sanitation, it’s like providing them with a super vaccine.”<sup>26</sup>

### Focus Dually on Rural and Urban Populations

Several funders and their grantees focus specifically on urban areas and the urban poor, such as Water and Sanitation for the Urban Poor program which partners with government actors in urban city centers such as Bangladesh. The Open Road Alliance supports Splash, an organization that seeks to ensure public schools, hospitals, and orphanages have appropriate WASH services. By the end of this century, the world is expected to shift toward megacities, making it crucially important to set up long-lasting WASH structures for densely populated areas and their economies.<sup>27</sup> At the same time, there are still significant disparities in rural communities’ access to water. Seventy percent of the world’s 2.3 billion people who lack basic sanitation services live in rural communities.<sup>28</sup> In urban areas, utilities are commonplace but need to be



### AN EXAMPLE OF A SUCCESSFUL GOVERNMENT-PHILANTHROPIC PARTNERSHIP

The Stone Family Foundation acknowledges that developing relationships with government actors can be challenging, but when the opportunity to do so arises, it can lead to significant progress. In Cambodia, a coalition of local NGOs and local government actors rallying behind an effort to build a national action plan on sanitation made the Foundation’s philanthropic support timely.

For the Foundation, this rallying cry felt like a turning point for the sector. To seize the opportunity, they considered how they could further support this groundswell and use their flexible funding to accelerate the process of developing this national action plan. They provided a small, flexible grant to Cambodia’s Ministry of Rural Development to support a contact in the office with a strong vision for sanitation work but who lacked implementation resources. Additionally, the Foundation recognized that the World Bank’s analysis of the WASH sector aligned with their own interpretation, and the two were able to jointly support the efforts of the Cambodian government. The Foundation’s most effective role was not to lead the process but to offer their support to the work of local leaders.



## USING PHILANTHROPY TO BUILD AN EVIDENCE BASE FOR NEW SOLUTIONS

Philanthropy can also play an important role in building an evidence base for new solutions, as in the Skoll Foundation's support for Water.org's Water Credit initiative. Water.org works across three continents to leverage the capital markets. The Skoll Foundation was compelled by the innovation of Water Credit because Water.org had built an evidence base and demonstrated how it unlocked financial resources to enable households, communities, and larger systems to develop and afford clean water and sanitation.

For Water.org to unlock microfinance in India to be used for household water and sanitation loans, they needed to raise a fund at the demonstration level so that other impact investors would feel comfortable with the investment. In collaboration with other philanthropic and impact investors, Skoll unlocked capital in India to make further investment possible. This appetite for risk is not strictly relegated to large foundations. Small foundations may use their nimble nature to make big bets as well.

maintained, while rural and poor communities often are not considered viable customers worthy of investment or lack the basic infrastructure such as roads and electricity to make investments feasible.

### Employ Technology and Innovation

Technological innovation is also regarded as a sustainable path to improving water resources and aligns with the belief that a “business-as-usual” model will not address water issues facing the global population. The Bill & Melinda Gates Foundation, for example, funds three categories of new technology within their WASH program: technologies that make it cheaper and more hygienic to pump out pits, small-scale treatment plants that kill all pathogens that can make people sick, and efforts to reinvent the toilet.<sup>29</sup> Other innovations, such as portable water filters to provide clean water, and new management approaches are all needed to rethink successful approaches to making lasting change with WASH.

### Support Market-Based Solutions

Funders interested in reaching both urban and rural communities have frequently supported market-based solutions. The World Bank estimates that \$1.7 trillion is required to achieve universal and equitable access to safe drinking water, sanitation, and hygiene for all by 2030, well above the amount historically invested in this area.<sup>30</sup> Because of this, new financing options and market-based solutions are increasing in popularity. Microfinance solutions seek to address the affordability of water and have been successful at enabling families to access utilities or secure water and sanitation infrastructure at home. Water.org, for example, facilitates water and sanitation loans for individuals and families in developing countries. The One Foundation funds the Safe Water Network's work in Ghana to operate community-owned water distribution facilities that charge a nominal fee for community members to access safe and reliable water.

Funding social entrepreneurs to solve WASH problems in a sustainable way is another promising approach. Funders of such innovation put emphasis on the importance of finding long-term solutions to WASH access that make sense for the needs of a particular locale. As Edwin Ou from the Skoll Foundation noted, funding is “about neither the funding decision nor the grant itself, it’s about the resulting partnership. Over the three-year grant period, we invest our own efforts to better understand the actual context in which [social entrepreneurs] operate. Then we might decide to place more funding, or help excite other actors or funders better placed to engage. Our intention is to not just offer a prop-up mechanism, but to also offer a bridge. Otherwise we run the risk of collectively leading them off a steeper funding cliff.”<sup>31</sup>

The Stone Family Foundation is a major proponent of market-based solutions, too, emphasizing that such solutions enable philanthropy to support the potential for beneficial innovation. As a demonstration of best practice

in considering the wider system in which market-based solutions operate, the Foundation is “making strategic investments to ensure the enterprise approach sits alongside and within the domestic government mandate” to provide WASH services.<sup>32</sup> In countries that *do* have reliable water access, utilities provided by a public-private partnership or quasi-governmental service are the best solutions to WASH issues. As the Stone Family Foundation suggests, supporting innovations that have the potential for government partnership can be the key to unlocking long-term, systemic WASH access.

Although many funders support market-based solutions as a key strategy, they also acknowledge the limitations. Market-based solutions only work if the enterprises are ultimately able to turn a profit without subsidy from philanthropic dollars. Funders may provide critically needed philanthropic capital to social entrepreneurs as they begin their work, but work toward reducing reliance on their funding over time. Furthermore, although these innovative solutions may provide water services at a reduced rate from what was previously available, the cost may still be prohibitive to low-income populations.

### Act Nimble and Be Willing to Take Risks

Taking risks can be a daunting undertaking for many funders who want to be sure their investments fund effective solutions. But risk is often required in order to find new solutions to problems that have yet to be solved. The Bill & Melinda Gates Foundation views its high appetite for risk, compared to the average funder, as an asset to philanthropic work and tries to put its dollars in places where others won't. Not many people are working on new approaches to WASH in poor, urban areas, and Gates Foundation funding serves an important purpose in these neglected areas.<sup>33</sup> Taking greater risks in funding can reap surprising rewards. The Osprey Foundation emphasizes that small foundations may be more flexible and better able to take on riskier and more innovative roles.<sup>34</sup> Funders of all sizes are learning there is an effective mix of being focused and strategic while also being responsive and opportunistic.

## Opportunities for Funder Collaboration

WASH funders are a small community. They stress the value of building strong relationships and providing networking opportunities to share their resources. The Skoll World Forum on Social Entrepreneurship (SWF), for instance, is designed to serve as a helpful convening point and is intended “to be a platform or through-line to advance collaborations that might have formed at a past SWF or even another forum.”<sup>35</sup> The C.S. Mott Foundation cited their practice of routinely bringing grantees together with community leaders around their program areas. As a funder, they set a strong example for collaboration by expecting grantees to work in collaboration with each other and with the communities they serve.<sup>36</sup>

### When funders share knowledge and lessons learned, they diminish the barriers to entry for others.

Funders highly value the opportunity to learn from one another. The Stone Family Foundation highlighted their experience working with the Bill & Melinda Gates Foundation as part of their grant review process in Cambodia. This provided the Stone Foundation with an opportunity to learn about another funder's process and get to know a grantee as part of a greater support system. Based on their positive experience, the Stone Foundation is eager to play this guiding role for other funders interested in deepening their involvement in WASH.<sup>37</sup>

The SDG platform has helped actors from across sectors identify and partner with each other. The Foundation Center launched WASHfunders.org, designed with philanthropic donors in mind. WASHfunders.org gives funders a “one stop shop” for the data and information they need to improve water access, sanitation, and hygiene around the world. The OECD has created the Global Network of Foundations Working for Development, netFWD, to promote increased public-private partnership. When funders share knowledge and lessons learned, they diminish the barriers to entry for others.

## Moving the Field Forward

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Innovations in the WASH sector are, for the most part, still in the early stages. Long-term success of WASH systems built in partnership with government entities remains to be proven. To advance the field, investment of patient capital and philanthropy are in great need. Innovative solutions are plentiful, but systems with realistic capacity to maintain their strength over time are rare.

Because WASH is so dominated by public funding, funders currently working in WASH have expressed a desire to develop a WASH-specific network with low membership fees. In such a small space, they want to build a tight-knit network that also welcomes new participants as learning partners. Yet building relationships with other private funders is not enough in WASH. Both international and domestic government actors play a crucial role in the sector as regulators, funders, and experts in their cultural context. Forging effective private-public partnerships can help to move the sector forward.

According to the World Health Organization, every \$1 invested in improved water supply and sanitation yields a \$4.30 return in the form of reduced healthcare costs for individual and society around the world.<sup>38</sup> Access to safe water and sanitation can quickly turn problems into potential – empowering people with time for school and work, and contributing to improved health for women, children, and families around the world. This work is a critical component of addressing the negative impacts of climate change while also enhancing human lives.



## II. Addressing the Global Refugee Response Crisis

### Overview

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According to the Office of the United Nations High Commissioner for Refugees (UNHCR), a refugee is “someone who has been forced to flee his or her country because of persecution, war, or violence. A refugee has a well-founded fear of persecution for reasons of race, religion, nationality, political opinion, or membership in a particular social group. Most likely, they cannot return home or are afraid to do so. War and ethnic, tribal, and religious violence are leading causes of refugees fleeing their countries.”<sup>39</sup>

In addition to refugee status, UNHCR defines several groups that have been forced to be “people on the move” – a term that has gained traction in recent years in recognition of the similar needs experienced by people with varying legal statuses:

- Internally Displaced Person (IDP): Someone who has been forced to flee home but not across an international border.
- Asylum Seeker: Someone who flees a home country and seeks sanctuary in another country, applying for asylum.
- Stateless Person: Someone who is not a citizen of any country and as such lacks the legal bond between government and citizen.
- Migrant: Someone who has left a home in search of better living standards. (This is a broader, less legal term.)

This section focuses on ways in which funders can support refugees and address the refugee response crisis, but the lessons learned can apply across these statuses to all people on the move.

UNHCR states that there are more than 70 million people around the world who are displaced from their homes.<sup>40</sup> Of these 70 million people, 25 million are refugees who have fled across borders.<sup>41</sup> The vast majority of global refugees – 86 percent – are hosted in developing countries.<sup>42</sup> Fifty-seven percent of those classified as refugees come from three countries: Syria, Afghanistan, and South Sudan.<sup>43</sup> Refugee children of school age are particularly vulnerable, as they are five times more likely to not attend school as peers who are not refugees.<sup>44</sup> The global number of refugees and displaced people continues to increase, and experts anticipate that in the coming years, with more severe climate conditions, that number will only grow.

According to the Office of the UN High Commission for Refugees, we are witnessing the highest levels of forced displacement on record. Over 70 million people are forcibly displaced globally, almost double the number of people of 20 years ago. Since 2008, an additional estimated 21.5 million people have been displaced annually due to climate change. With the growing frequency of conflicts in Syria, Myanmar, South Sudan, Yemen, Burundi, Ukraine, and Venezuela, just to name a few, it is anticipated that these numbers will continue to rise significantly.

In Central America, those who flee tend to be labelled as economic migrants, but recent evidence has shown that gang activity and organized crime have caused people there to experience violence on par to that of civilians in a war zone.<sup>45</sup> Violent conflicts in Afghanistan, Eritrea, Somalia, Democratic Republic of Congo, and South Sudan have also contributed to the worldwide refugee population.<sup>46</sup>

The Rohingya people of Myanmar, a stateless group residing in Myanmar's Rakhine state, have suffered from ethnic

cleansing. In 2016-17 around 625,000 Rohingyas fled persecution in Myanmar and entered Bangladesh. According to the United Nations Office for the Coordination of Humanitarian Aid (OCHA) about 1.2 million Rohingyas are in need of humanitarian assistance in Bangladesh.<sup>47</sup> The Joint Response Plan, which was launched in February 2019 is only funded up to 17 percent. The plan prioritizes emergency and long-term needs.<sup>48</sup>

The humanitarian crisis in Venezuela is also ever-growing. As of May 2019, 3.7 million people have fled Venezuela<sup>49</sup>, 2.7 million to Latin American and Caribbean countries.<sup>50</sup> Colombia is the biggest host country with about 1.1 million people, followed by Peru with 506,000, Chile with 288,000, Ecuador with 221,000, Argentina with 130,000 and Brazil with 96,000.<sup>51</sup> By the end of 2018, around 460,000 Venezuelans had formally sought asylum in Latin America.<sup>52</sup> In mid-May 2019, UNHCR requested to classify Venezuelans as refugees and respond to this group accordingly.<sup>53</sup>

Meanwhile, the humanitarian crisis at the US-Mexico border is deteriorating as well. Central Americans and other people from Asia, Africa, and Eastern Europe are facing increasing obstacles to seek asylum in the United States. New policies including the "Remain in Mexico" policy over recent months are preventing people from seeking protection in line with international regulations and US law. While people are sometimes labeled economic migrants, again, recent evidence shows most are fleeing persecution and violence.

The Syrian civil war has been the largest cause of refugees in recent years. Approximately 12 million Syrians, or more than half of the country's population, have been internally displaced and are in need of support, and approximately 5.63 million<sup>54</sup> people are refugees who have fled the country seeking safety. These individuals mainly fled to surrounding countries including Jordan, Turkey, Iraq, and Lebanon, where national governments have struggled to provide the necessary services and supports for such large groups of people. In Lebanon, for instance, refugees now make up nearly a quarter of the entire population of the country,<sup>55</sup> and Turkey is the largest country of asylum with over 3.6 million registered Syrian refugees and over 300,000 "persons of concern" from other countries.<sup>56</sup>

There has also been movement of refugees into Europe from many countries across the Middle East and Africa.<sup>57</sup> In 2015,

this migration into Europe peaked at one million people<sup>58</sup>, and it has continued to decrease since then with 139,300 people entering Europe in 2018.<sup>59</sup> Governments there, too, have struggled to respond to emergency needs and provide for long-term resettlement. In particular, Greece and Germany have tried to provide for the influx of people. Other countries have been less open, due to anti-immigrant sentiment and increasingly nationalistic governments. Many countries, including Hungary and Macedonia, reinforced their borders leading to protracted refugee contexts in Greece and along the Balkan route. The European Union also failed to agree on a quota system to equally distribute people on the move in entry countries. The influx of people that occurred in 2015 and 2016 led to a rise of anti-immigrant movements and fueled the rise of nationalistic parties and governments. A number of factors, including increased border restrictions that leave people stranded at sea waiting to dock, meant that the number of deaths at sea increased to an average of six people dying at sea each day in 2018.<sup>60</sup>

## Challenges to Funders

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The context for refugees is complex, and it changes frequently based on national politics and policies. One of the overarching challenges is that government support for this population varies from country to country. The response to refugees depends on each country's national laws, which leads to varying levels of refugee support across the world. At the same time, many funders struggle to connect to the needs of faraway refugees or feel adequately prepared to understand needs in individual countries.

The challenges faced by refugees stretch beyond access to food and shelter. Providing basic survival resources is incredibly important, but reframing the definition of basic needs to include a sense of community, belonging, and psychosocial well-being helps to more accurately encompass people's needs. Advocates encourage funders and NGOs to look at this issue from the human perspective and adopt a holistic approach to their support.

As refugees increasingly live in urban areas rather than in camps, funders must take caution not to create tensions by providing refugees access to resources not available to local people. Most refugee host countries are facing challenges due to low economic development and related unemployment rates. Often the local infrastructure needs more support to be able to offer services such as health and education for people on the move. Inclusive response models exist that provide support for refugees and locals together to avoid contributing to community animosity.

Philanthropic resources can also play an important role in supporting long-term solutions. Basic needs and emergency assistance are so pressing that other approaches can get lost, but funders who wish to move beyond short-term charitable contributions can do much to support planning, resettlement, and other longer-term solutions to the refugee response crisis.



### CHALLENGES TO FUNDERS:

- Support needed for refugees varies by country
- A conflict-sensitive approach is needed that avoids contributing to tensions between refugees and host communities
- Needs of refugees go far beyond basic access to food and shelter, requiring a humanistic, holistic approach to philanthropy
- Long-term solutions are important, but paired with urgent immediate needs, can be forgotten

## Current State of Philanthropy

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UNHCR estimated a 43 percent funding gap in 2017 to address the most basic humanitarian and protection issues.<sup>61</sup> The Aurora Price for Awakening Humanity's Humanitarian Index found a gap between peoples' compassion for the refugee crisis and their ability to turn their compassion into action – 27 percent did so only after hearing a personal story about a refugee.<sup>62</sup> Despite the high level of media attention given to refugees, US philanthropy toward migrants and refugees decreased by 13.9 percent between 2011 and 2014.<sup>63</sup> This drop in funding could reflect donor fatigue or the sense that any contribution is not significant enough to make a difference.

While the majority of financial support for refugees comes from government agencies, several multinational companies have made significant philanthropic contributions and introduced new innovations for supporting refugees. The TripAdvisor Charitable Foundation has committed at least \$5 million over three years to work with Mercy Corps and the International Rescue Committee (IRC) on resettlement and reintegration.<sup>64</sup> Chobani provides employment for refugees, and nearly 30 percent of the company's employees are refugees from 20 different countries.<sup>65</sup> As with many global issues, there remains significant opportunity and room for growth for private philanthropy to play a role in addressing the global refugee response crisis.

## Philanthropic Strategies

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Refugee crises are often thought of as short-term emergencies. While this is true in some instances, most individuals face prolonged displacements, in line with the increasingly protracted nature of violent conflict. The average length of time spent as a refugee is 10 to 17 years.<sup>66</sup> Geographically-focused philanthropic strategies are needed to address the root cause of displacement in the countries from where people are fleeing; refugee camps and urban host communities receiving large numbers of refugees; and resettlement, including long-term housing, education, and employment. In addition, strategies can address the enormous range of needs of refugees, from basic food, shelter, and safety to long-term employment opportunities, training, and stability. There is also a significant need for mental health and other health and social services, given the high levels of trauma that refugees and displaced people experience.

## Focus on Immediate Needs

Some of the most pressing needs of refugees are those that would be considered “basic” or more easily accessed by other populations. For people on the move, reliable food, housing, shelter, and mental and physical healthcare services quickly become urgent necessities that can be difficult to come by. Psychosocial wellbeing is a crucial aspect and needs to be addressed from the outset through holistic approaches. There is also a pressing need for education in most refugee situations. Schools struggle to handle the increased number of students, education curricula across country lines do not easily translate, and in many situations, local schools do not offer education in refugees' and migrants' native languages. For example, countless children from Syria – a country that previously had a 94-96 percent youth literacy rate – have been out of school for years, motivating the United Nations Children's Fund (UNICEF) to launch its “No Lost Generation” campaign.<sup>67</sup> All of these urgent needs can become protracted when the countries in which refugees settle offer limited opportunities for these individuals to work to support themselves. Meanwhile, the conflict or violence they have fled continues back home, making a return to their home country nearly impossible. Philanthropy has

As with many global issues, there remains significant opportunity and room for growth for private philanthropy to play a role in addressing the global refugee crisis.

an important role to play in supporting both short-term emergency assistance with long-term needs allowing families to survive and eventually thrive and contribute to their new communities.

The grassroots sector has been instrumental in responding to the needs of refugees across migration routes, with innovators who elevate the response to a holistic level.

## Advocate Globally and Support Refugee Rights

Some of the biggest impediments to long-term resolution of refugee issues are the national laws and policies that prevent the free movement of people – laws and policies that exist in a global environment that is increasingly nationalistic and opposed to accepting refugees. Funders can play a significant role in reshaping such policies by funding

advocacy for refugee rights and in speaking out themselves. For example, in 2015, thanks in large part to advocacy work in the US, the Obama Administration announced it would increase the number of Syrian refugees welcomed into the US.<sup>68</sup> Another example is the Grantmakers Concerned with Immigrants and Refugees (GCIR), a group of funders in the US who have been partnering with nonprofit organizations to try to influence decisions about resettlement at the national policy level.<sup>69</sup>

An example of the crucial role of advocacy in the refugee context is International Refugee Assistance Program (IRAP), which successfully contributes to the development of an enforceable system of legal rights and procedures for refugees worldwide. Recently, IRAP has helped enact nine provisions of US federal legislation that afforded new legal rights to over 160,000 displaced people.<sup>70</sup>

While refugees are granted certain global rights as a result of the 1951 UN Convention Relating to the Status of Refugees and subsequent protocols, those rights are limited in scope, and not all countries abide by them.<sup>71</sup> Nonprofit organizations have an important role to play in pressing for human rights to be respected, and funders are critical partners in this effort.

### Recognize the Different Needs of Different Populations

Even among populations of refugees and displaced persons, there are certain groups who face greater challenges than others in similar situations. For example, women and girls have particular health and hygiene needs, and they are more vulnerable to sexual exploitation than their male counterparts. In many refugee families, men who were the breadwinners have been killed or separated from the family, and women are responsible for all their families' financial and caretaking needs.

When thinking about support to refugees, advocates encourage funders to be sensitive to these and other gender-specific needs, including specific support for young and older men. Men, for example, are more likely to be the primary income earner, and their wellbeing affects the entire family.

Other groups such as LGBTQ+ (Lesbian, Gay, Bisexual, Transgender and Queers or Questioning people) and people with disabilities face unique challenges. Often LGBTQ+ refugees are facing discrimination, persecution and violence from the refugee community as well. Likewise, people with disabilities face unique challenges. According to the Women's Refugee Commission, displaced people with disabilities "are often excluded from programs and activities that would protect them and help them develop their skills, including services addressing gender-based violence, programs for adolescents and youth, and information and education about sexual and reproductive health and services."<sup>72</sup>



### THE IMPORTANCE OF BEING FLEXIBLE

In some cases, filling the gaps means an NGO bringing an active challenge to a funder to problem solve jointly. For example, when the US instituted a travel ban on people from eight countries including Syria, and thus halted all Syrian refugees from entering the US, the US-based Shapiro Foundation began looking at how to support refugee resettlement elsewhere. Canada had excess space within their resettlement cap that was going unfilled.

Ed Shapiro of the Shapiro Foundation caught wind of this and began problem-solving with The Refugee Hub in Ottawa. Ed had adapted the Canadian private sponsorship model to help resettle Syrian Refugees in the US in 2016-17. Through that project, he learned that volunteers and donors are both critical to the success of refugee integration. So when it came time in 2018 to discuss the challenges facing Canada, he quickly convinced his partners that in refugee resettlement, there are those who can volunteer time and a distinct group that can donate dollars. The current system amalgamates the two and that's why they were struggling. Ed rapidly mustered a new funders group that mobilized more than 140 new sponsorship groups to resettle 685 refugees into spaces which were moments away from expiring empty.



## EARLY EDUCATION FOR REFUGEE CHILDREN

In the first three years of life, the human capacity to learn is at its greatest and early childhood development takes place at a faster rate than any other time. According to UNICEF, there are 35 million refugee and displaced children living in countries affected by violent conflict. They have lost loved ones, lost homes, and need nutrition, water, healthcare, emotional support, and protection. Millions of children have no access to quality early learning, yet less than 3 percent of humanitarian aid goes to education and a fraction of that to early childhood.<sup>73</sup>

To address this issue, Sesame Workshop and the International Rescue Committee (IRC) received the John D. and Catherine T. MacArthur Foundation's 100&Change Award in 2017, providing \$100 million to support the largest early childhood intervention in the history of humanitarian response, to bring early learning and nurturing care to displaced children and those in host communities across Iraq, Jordan, Lebanon, and Syria. The LEGO Foundation joined this partnership with an additional \$100 million commitment to expand to Bangladesh. Through home visits and learning centers, and a new, local version of Sesame Street, millions of children and families now have the resources to build resilience and overcome traumatic experiences, giving them a better chance to reach their full potential.

Children on the move are another highly vulnerable group that needs special attention. This applies especially for unaccompanied minors: children who have been separated from their parents on their journey or who have embarked on it alone. Unaccompanied children on the move face risks of sexual and labor exploitation as well as trafficking along their entire journey, including in reception centers and refugee camps as well as in their final destination countries.

Many funders see these and other groups in need of particular attention and choose to direct support specifically aimed at these distinct needs within an overall strategy. This more focused approach can be beneficial, including efforts to address the needs of vulnerable yet overlapping populations, such as girls with disabilities.

### Be Flexible and Fill the Gaps

One of the challenges for funders focused on refugees and other people on the move is the continually changing nature of what is happening. People move across different geographies, political contexts in countries are

**Even among populations of refugees and displaced persons, there are certain groups who face greater challenges than others in similar situations.**

changing, and the overall funding landscape is continually evolving. Core support to refugees from national governments and multilateral institutions can change from year to year, with strict regulations for how dollars can be used, often falling short of what is needed. Private philanthropy can help to supplement gaps in funding by being flexible as needs change and quickly able to make decisions or redirect the focus of grants. Many organizations have restrictions on what their grants can support, so the flexibility to support a range of needs can be significant.<sup>74</sup>

### Fund Grassroots Organizations

Often funders overlook the critical role of grassroots, community-led organizations, which tend to fill the gaps in the refugee support system across migratory routes. These tend to be more flexible in adequately responding to ever-changing circumstances on the ground. For example, Better Days for Moria, a Greek grassroots organization, addresses crucial access to childhood education for transient refugee communities. Their Gekko Kids project provides informal alternative education on the island of Lesbos, a key entry point into Europe. With customized and pedagogical programming for refugee children aged 10 to 18 years old, Gekko Kids' curriculum includes traditional modules such as English, Greek, mathematics, and computers, serving as a transitional foundation to what the students will find themselves learning once registered to a public school.<sup>75</sup>

However, grassroots entities receive a fraction of the funding and face challenges due to inability to access funding flows. Funders have a significant opportunity to invest in the programs and capacities of grassroots and community-led organizations. In some contexts, it is advisable to do so directly, while in others it is recommended that funding be channeled via intermediary organizations that emphasize coordinating grassroots groups and building their capacities.

### Fund Long-Term Resettlement

Resettlement can offer refugees an opportunity to start fresh in a country that offers safety and opportunity. Resettlement allows people to integrate into a community, get jobs, and send their children to school. However, depending on which country a person resettles in, the level of financial and structural support they find might be limited and short-term in nature. Philanthropic support for programs that welcome refugees as they arrive in a country, help them access social services, and give them a sense of belonging in their new community can make a substantial difference. For example, refugees who resettle in the US typically arrive without much money and often have accumulated debt. The cost of their travel is paid through a travel loan, and they must agree to pay it back within six months.<sup>76</sup> They are provided limited funds for the first few months, and their immersion into life in the US is usually managed by one of only nine nonprofit organizations<sup>77</sup> that partner with the US government to provide services.<sup>78</sup> Government funding for these services is limited, so these organizations rely on private philanthropy to support their work and extend services beyond the first few months of a refugee's resettlement.

### Opportunities for Funder Collaboration

Funder collaboration around the global refugee response crisis has taken the form of collaborative funding, convening, and advocacy work. Entities like the Global Refugee Crisis Fund, a pooled and flexible funding pool through the Center for Disaster Philanthropy, provide funders with streamlined avenues to contribute to refugee needs, even for funders new to the issues. A primarily US-focused donor collaborative is the Four Freedoms Fund (FFF). The FFF is working toward full integration of immigrants (and refugees) as active participants in the country's democracy. The Fund provides long-term general operating grants, quick-turnaround funding, supports narrative change and

effective communications, and local and state-based civic engagement activities along with alliance-building with other constituencies. The current members include the Emerson Collective, Unbound Philanthropy, and Oak Foundation. Giving circles focused on refugees, such as one hosted by New England International Donors (NEID), convene funders to learn together, inspire engagement in the issues, and pool giving for greater impact. Philanthropic convenings provide additional space for funders to share ideas, lessons learned, and successes and failures. For example, the Global Philanthropy Forum's 2016 conference focused on People on the Move, and spurred funders to reframe their thinking and honor the dignity of all people. In addition, GCIR hosts a working group of 20-25 funders that focus on how to support refugee resettlement in the US. Funders have an opportunity to work together, leveraging one another's resources and expertise for greater impact. Yet another organization, Funders Concerned with Refugees and Asylum Seekers (FRAS), has about 45 members and is open to funders who are not part of GCIR.



## THE GLOBAL WHOLE BEING FUND

The Global Whole Being Fund (GWBF) supports courageous and compassionate local, national, and international organizations, initiatives and networks with a strong emphasis on grassroots organizations. The Fund focuses on supporting the holistic wellbeing of people on the move and their host communities, nourishing dignity and self-determination. The GWBF has been working closely with Help Refugees to ensure that funds meet real-time emergency and long-term needs of refugees and locals. Help Refugees is a “funder-mediary” that raises funding from individual donors and foundations, and channels those funds to 83 carefully vetted community-led organizations across 13 countries. Help Refugees has the infrastructure, expertise, relationships, and overall capacity to support its partner organizations along different migration routes. Through Help Refugees, the GWBF is able to maximize its impact on the ground by allocating resources in an ethical, flexible, efficient, and responsive manner.



## Moving the Field Forward

Experts predict the number of refugees and people forced to flee will increase in coming years as climate change worsens agricultural conditions, contributes to conflict, and destroys people’s homes. While the SDGs do not have a specific goal on refugees, SDG 10.7 does mention attention to migrants: “facilitate orderly, safe, and responsible migration and mobility of people, including through implementation of planned and well-managed migration policies.” At the same time, many countries are becoming more nationalistic and less open to people

### A global network of refugee funders would allow for improved coordination and collaboration.

resettling within their borders. Funders who have been providing support to significant refugee populations are experiencing donor fatigue, and some are reprogramming their funding elsewhere.

Smaller foundations who are new to the space and interested in expanding their funding can help re-energize work being done to address the refugee crisis. Funders already active in this area can play a valuable role in supporting smaller funders by providing resources for giving circles, convenings, educational sessions, and other ways of learning. Similarly, funders in different parts of the world would benefit from increased collaboration, as funders may be scattered but NGO recipients of their funding may be based in the same countries and cities. A global network of refugee funders would allow for improved coordination and collaboration.

Globally, there is need to continue to make the case for the funding and resettlement of refugees. Campaigns like the current We Are All America campaign in the US can help to share information about the importance of supporting refugees and build internal momentum within countries for increased national support. This global support is critical to the lives of the growing numbers of displaced people.



### III. Improving Conditions for Women and Girls

#### Overview

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Women have often been at the forefront of social change and development.

In 1956, the Women's March in South Africa mobilized 20,000 women of diverse backgrounds to protest apartheid.<sup>79</sup> Leymah Gbowee was instrumental in ending the 14-year Liberian civil war by bringing together Christian and Muslim women in 2003.<sup>80</sup> Wangari Maathai brought sustainable farming to Kenya through the Green Belt Movement.<sup>81</sup> Asmaa Mahfouz played a critical role in the 2011 mass uprising that led to regime change in Egypt, and Tawakkol Karmen led demonstrations in Yemen calling for democratic change.<sup>82</sup> Eleven-year-old Malala Yousafzai bravely wrote about her life under the Taliban in 2009.<sup>83</sup> In the US, Eleanor Roosevelt created the Universal Declaration of Human Rights in 1948, and Ella Baker was a leader in the human rights and civil rights movements.<sup>84</sup> In 2017, Tarana Burke's #MeToo went viral, spurring a global movement.<sup>85</sup> Women are leaders in their households, their communities, and their countries, while girls increasingly wield their skills and abilities as community agents of change as well.

Investment in girls' education may well be the highest return investment available in the developing world. Each year of secondary school boosts a girl's future earning power by roughly 18 percent.<sup>86</sup> Investments in women benefit society as a whole because they are more likely to invest in their families and communities. Mothers channel more money to their children than fathers, helping to reduce child mortality rates.<sup>87</sup>

In 1979, the UN adopted the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), a bill of rights for women that defined various types of discrimination and set up an action plan to dismantle discrimination.<sup>88</sup> The Beijing Platform for Action, adopted in 1995, promotes gender equality and establishes rights for women by calling on countries to implement rights in domestic law.<sup>89</sup> While some progress has been made, the issues that affect women and girls are numerous, ranging from physical safety to the right to work and be represented in their government. Women's issues are not singular. One woman may face any number of issues at the same time and struggle to navigate the complex systems that prevent them from progressing economically or living in a safe environment.

As the NoVo Foundation and Philanthropy Advancing Women's Human Rights (PAWHR) both emphasize, a key component of supporting women and girls is recognizing the importance of intersectionality; every woman has multiple identities that specifically shape her life experience. Although the issues faced by women and girls often overlap, it is important to recognize girls' issues as distinct concerns specific to being a child. Issues facing women and girls are commonly broken down into the following areas: human rights, health, education, gender-based violence, leadership and participation in social and political structures.

## Health

For men and women alike, there have been steady improvements in lifespan over time. For women, complications around access to information and quality healthcare and childbirth and sexually transmitted disease remain. On average, 830 women worldwide die each day due to complications with pregnancy and childbirth.<sup>90</sup> Worldwide, 214 million women who are trying to avoid pregnancy are not using modern forms of birth control, partially due to lack of access.<sup>91</sup> Furthermore, HIV/AIDS continues to be a major factor in decreasing the life expectancy of women. Girls also face a number of health-related issues. In sub-Saharan Africa, adolescent girls age 15-24 are eight times more likely to contract HIV than their male counterparts,<sup>92</sup> and face early exposure to pregnancy.<sup>93</sup> Sex selection is a persistent practice, with about 1.4 million girls missing at birth in any given year.<sup>94</sup>

## Education

Due to a concerted global effort to raise awareness and build support for the rights of all children to primary education, and especially the importance of girls' education, the gender gap<sup>90</sup> in primary education has narrowed. According to the World Economic Forum, only a 5 percent gap in educational attainment remains between males and females, with 36 countries fully closing the gap.<sup>95</sup> The transition rate from primary to secondary education increased from 83 percent in 1995 to 91 percent in 2011, although sub-Saharan Africa and South Asia continue to lag behind.<sup>96</sup> Although girls' access to education has certainly improved over time, girls are more likely to be kept out of school to work in the home. In addition, safety for girls when traveling to school continues to be a concern, as they are subject to attacks both as females out in the world and as females trying to receive an education. While progress has been made in educating girls, the previous generation was left behind and this legacy continues today, as two-thirds of illiterate people in the world are women.<sup>97</sup>

## Participation in Social and Political Structures

Women's participation in local, national, and international economies remains limited in comparison to men's. There is a significant gap between women's access to assets, resources, inheritance, land, and property compared to male counterparts. As noted in the 2015 "No Ceilings" report supported by the Clinton Foundation and Bill & Melinda Gates Foundation, "Women in developing countries are 20 percent less likely than men to have an account at a formal financial institution or bank, and 17 percent less likely to have borrowed in the past year from a formal institution."<sup>98</sup>

In addition to access to financial resources, women in the workplace face discrimination. Only one-third of country constitutions have legal protections for women in the workplace.<sup>99</sup> The gender pay gap and glass ceiling continue to limit women's advancement in the workplace, as does limited access to paid maternal leave after birth. Most countries provide paid maternal leave, but the amount of time off for childbirth varies greatly and does not provide time for spouses and/or partners to equally take on the work of childcare. In addition to work outside the home, women devote an average of up to three more hours per week than men do on work involving the household and family.<sup>100</sup>

This means that, in addition to the time spent working in an office with limited advancement opportunities, women typically spend more time participating in unpaid, domestic labor.

Women's representation in politics, the media, and the boardroom is increasing but still lags behind men. Women represented 23.3 percent of national parliaments in 2016, and this figure has been steadily increasing over time.<sup>101</sup> In 2000, the UN Security Council adopted Resolution 1325 to address women's roles in peace and security issues. UNSCR 1325 "reaffirms the important role of women in the prevention and resolution of conflicts, peace negotiations, peace-building, peacekeeping, humanitarian response, and in post-conflict reconstruction and stresses the importance of their equal participation and full involvement in all efforts for the maintenance and promotion of peace and security."<sup>102</sup> This was a landmark resolution from the UN, and has since been followed by several other resolutions to reaffirm and expand it. In total, these eight resolutions are referred to as the Women, Peace and Security Agenda.<sup>103</sup>

### Gender-Based Violence

Violence against women takes many forms. Domestic and partner violence persists in every culture. Unsafe migration among women seeking work increases the chances of human trafficking. Human trafficking is of particular danger to women, more specifically to girls as "the estimated share of girls among total trafficking victims has doubled, from 10 percent in 2004 to 21 percent in 2011."<sup>104</sup> Women and girls are disproportionately affected by modern slavery, accounting for 28.7 million, or 71 percent of the overall total. More precisely, women and girls represent 99 percent of the victims of forced labor in the commercial sex industry and 58 percent in other sectors, 40 percent of victims of forced labor imposed by state authorities, and 84 percent of victims of forced marriages.<sup>105</sup> Genital mutilation, also known as Female Genital Mutilation/Cutting (FGM/C), has affected "more than 130 million girls and women in 29 countries in Africa and the Middle East."<sup>106</sup> Sexual violence disproportionately affects women and girls, and continues to be used as a tool of war. The statistics on sexual violence against girls are especially alarming. The Center for Disease Control's National Violence Against Children surveys in five countries show that 26 to 28 percent of girls experience sexual violence before they are 18.<sup>107</sup>

### Challenges to Funders

Given the innumerable and overlapping issues that affect women and girls, the challenges in supporting this segment of the world's population are often rooted in an inability to truly know the scope of the issues and the most effective solutions. There have been advances in legal protections for women and girls across the world, but in many countries these legal



### CHALLENGES TO FUNDERS:

- Issues facing women and girls are innumerable and overlapping.
- Global rise of fundamentalism threatens women's rights.
- Long-entrenched behaviors and cultural attitudes are difficult to change and requires long term investments in policy, structural, and cultural change.
- Women and girls continue to struggle simply to be seen and recognized in many contexts.

protections provide exceptions for religious communities. As Emily Nielsen Jones of the Imago Dei Fund said, the “language of women’s empowerment is sometimes just layered over ancient gender norms that don’t see women as fully human. Looking at how you get at those deep-rooted beliefs [to] totally change the system” is a crucial task that can seem impossible.<sup>108</sup>

Shalini Nataraj at the Ing Foundation echoes this, “If [funders] are not funding rights-based approaches, just having a focus on women could do more harm than good in many instances. You have to have a very considered, quite complex approach. We can’t just say we’re going to bring women together and make them entrepreneurs and that will change everything. Often the underlying social and religious norms don’t change, and that can be the trigger for the backlash. In my view, more funding really needs to go to root causes and addressing why women do not have access to their rights, rather than just putting band-aids on things.”<sup>109</sup>

The rise of fundamentalism is an increasing threat to women’s rights, as advancing women’s human rights is even more difficult work amidst a fundamentalist government or countries where fundamental movements have taken root. Many advocates for women’s rights are focused on maintaining legal and policy victories already obtained for fear that political shifts will strip away rights that have already been won. As Katrin Wilde from the Channel Foundation noted, “How do you find a balance between holding the line on gains already achieved when they are under threat and attack...and finding opportunities for new growth and expansion?”<sup>110</sup> In addition, advocacy networks for women and girls’ issues are small and lack the support they need to combat attacks on women’s human rights.

There is a lack of data on women’s rights and needs, and a lack of commitment to evaluation and assessment for the programs that support them. There is recognition that evaluation and assessment are important for building the evidence base for addressing these issues, but funding falls behind this desire to collect data. A report published by Women Thrive in 2014 emphasizes the lack of data around women and girls’ issues, stating, “Many interviewees expressed frustration with how donors are approaching gender integration in all spheres, not just economic growth... Practices for gender integration have not yet caught up to the awareness and rhetoric of major development actors.”<sup>111</sup>

There are many ways in which women and girls around the world remain invisible – both in their mere existence and in their plight. Without system-wide support for women and girls’ rights in law, policy, leadership, and the economy, progress will be difficult or impossible. Recent research funded by the NoVo Foundation found a large gap between what girls say they need and what is actually available to them.<sup>108</sup> With this in mind, philanthropists are advised to listen to the needs of women and girls in each region of the world.



## Current State of Philanthropy

The SDGs provide guiding principles for supporting women and girls. SDG 5 – achieve gender equality and empower all women and girls – includes targets around ending discrimination, eliminating all forms of violence, ending child marriage, ensuring women’s participation and equal opportunities for leadership, and many other stipulations of the ways that women and girls need to be recognized, protected, and uplifted.<sup>113</sup>

The Association for Women’s Rights in Development (AWID) estimates approximately \$14.6 billion in commitments to support women and girls.<sup>114</sup> Most of this is in the form of Overseas Development Assistance (ODA);

## The private philanthropic funding community for women and girls remains a small network.

the private philanthropic funding community for women and girls remains a small network. The majority of funding for women and girls’ issues flows from the global north, with the most funds (50 percent) directed to sub-Saharan Africa.<sup>115</sup> The top giving areas for women and girls are women’s economic empowerment, women’s leadership and empowerment, education for women and/or girls, and public health. Peace and conflict work in support of women and girls receives the least amount of funding.<sup>116</sup>

It is easy to assume that large foundations and funders have an advantage in international grantmaking, with the capacity to build the truly global network that is needed. Through relationship building and convenings, however, smaller foundations and individual funders are making smart grantmaking choices addressing critical gaps. As the Samuel

Rubin Foundation shares, their small size allows them to be nimble and provide seed funding to new organizations, which helps leverage support from larger funders.<sup>117</sup> In this way, small foundations are part of the greater ecosystem of women and girls' grantmaking built on the power of networks.

## Philanthropic Strategies

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Strategies to tackle issues affecting women and girls center on listening to women, supporting movements, and promoting advocacy. Community-driven development is a key part of these support strategies, as is seeing grantmaking as part of a larger ecosystem. Funders can enhance their impact when they understand, or work with partners who understand, the greater context of the communities to which they give, including cultural expectations, political climate, and the positive and potentially negative implications of their funding in those communities.

### Support Women's Voices and Leadership

As general best practice, funders interested in supporting women and girls' issues should ask themselves who is doing the actual work they intend to support, review the gender of trustees and organizational leadership of potential grantees, and infuse knowledge of and appreciation for cultural context into funding decisions. Network-building for women on the frontlines of fighting for their rights is incredibly important. Funders can make these connections possible, pay for women to attend convenings on issues they are tackling, and strengthen networks and coalitions in other important ways.

### Strategies to tackle issues affecting women and girls center on listening to women, supporting movements, and promoting advocacy.

Flexible funding can enable grantees to use resources in ways that best advance key goals and priorities. The Global Fund for Women, for instance, develops deep relationships with grantees and supports the same groups for many years, helping to engender greater trust and transparency over time. Supporting women's power and mobilization at all levels to drive their own change is a common best practice among seasoned funders in this area. The Global Fund for Women is a strong proponent of this collective action strategy, which calls for funders to invest in women's rights organizations and

movements specific to each region.<sup>118</sup> Women's funds across the world are uniquely equipped to support women and girls as they are familiar with the cultural, religious, political, and other contexts that relate to the intersectional issues women face in their region. Women's funds in the global south represent important potential vehicles for funders looking for effective intermediaries.<sup>119</sup>

There are many places where women and girls' voices remain unheard. Advancing indigenous women's rights and leadership, for example, is crucial in large part because of the important role they play on the frontlines of climate change work around the world. Women with disabilities also require particular attention, as many disability rights' organizations continue to be led by men who may not understand the needs of female constituents. The women on the frontlines of fights for their rights around the world need funders to help protect them from physical danger and retaliation, but also to provide them with the self-care they need to sustain their work over time without burning out. Creative solutions in light of legal restrictions on such support can also be necessary to help women's groups continue their work.

### Focus on Girls

Funders should acknowledge the difference between issues that affect women and those that specifically affect girls. The NoVo Foundation infuses this belief into their work with girls-specific funding. The Foundation supports work that centers on girls of color in advocacy and structural change, specifically supporting approaches that address barriers for girls of color at an institutional level. The Foundation describes their strategy as not focusing narrowly on traditional "issue areas" such as education or healthcare, but instead supporting areas where girls will remain invisible to the world if not highlighted by their funding, including girls in migration, girls in emergency contexts, and holistic work to address sexual violence and child marriage. NoVo funds transformational work that builds girls' power and centers girls' perspectives, voices and lived experiences in challenging oppressive structural barriers.<sup>120</sup>

## Changing Mindsets

The work of changing mindsets, particularly those that are tied up in culture and tradition, is intangible and difficult to measure. However, the work to deconstruct gender power structures runs throughout many strategies to support women and girls. This approach focuses on changing the narrative and mindsets around gender norms. Gender norms are not held solely by men, but are internalized beliefs held by all people about the role of women and girls in society. AWID describes gender norms as the “social and cultural norms that uphold and ‘normalize’ gendered differences in access to resources, power, privilege, opportunities, and responsibilities.”<sup>121</sup> Gender power structures also exist as formal laws, policies, structures, and resource allocations created by governments, law enforcement, and other institutions that infuse gender bias into policy. At the most tangible level, gender power structures are present in women’s lack of access to material and knowledge resources including employment, credit, education, healthcare, inheritance, training, leadership, and decision-making opportunities in the home, workplace, and government.

Supporting movement-building can make this problem more manageable to tackle. The Global Fund for Women’s model is built on a worldwide network of advisors with regional expertise in what is needed, which organizations are doing effective work, and where there is more work to be done.<sup>122</sup> Funders who build this type of network can provide opportunities to educate people on the rights of women as they currently exist as well as what should exist. For some funders, this type of education focuses on changing the beliefs and mindset of boys to end patriarchal cycles of sexism. Other funders support young women in leadership and promote youth voice in advocating for their rights. Many funders also address gender power structures through peace and conflict work, bringing people together from opposing sides and providing peace education training.<sup>123</sup>

## Provide Support that Uses a Gender Lens in Times of Armed Conflict and Natural Disasters

Women are particularly at risk during armed conflict and natural disasters. Shalini Nataraj, Vice President of Programs at Ing Foundation shares a specific situation in which women were at a disadvantage in a crisis: “When the tsunami hit southeast Asia some years ago, women died in larger

numbers, because first, in largely Muslim countries, women are not encouraged to go out, so they did not flee. Two, the clothes they were wearing were hampering their ability to get away, even if they did want to flee, and they drowned. Then, when it came to aid distribution, because women are not supposed to be in the public space, they are not out there to get the aid like men are. Gender plays a very important role, life or death in certain circumstances.”<sup>124</sup>

## Opportunities for Funder Collaboration

To effectively support issues that affect women and girls, many funders have adopted the women’s fund model. This model is locally led and locally staffed, and built on a culture of local philanthropy and trust in local leadership. Funders get to know grantees on a personal level, and look to those doing the work on the ground to tell them what is needed.

Bringing together funders who support improving conditions for women and girls together can be as important as bringing together frontline activists. Several important funder gatherings exist, including the Commission on the Status of Women, the Women Deliver Conference, the Women’s Forum for the Economy and Society, the World Economic Forum, and a biennial AWID convening. The NoVo Foundation is launching a collaboration of six global funders specifically focused on girls to help funders figure out how to serve girls as a stand-alone population within a funder’s grantmaking portfolio.<sup>125</sup> Giving circles focused on women and girls also provide a helpful connection for funders, allowing them to talk about issues that affect women and girls on the macro and micro levels and to share their own experiences as funders and human beings in this space. Emily Nielsen Jones of the Imago Dei Fund, who chaired the NEID Women and Girls Giving Circle says, “In the [giving] circle, you bring your own story as a woman and have a place to dialogue about it. The micro and macro go together.”<sup>126</sup>

As women increasingly gain seats in corporate boardrooms and gain increased wealth through the business world, they are taking on increasingly prominent philanthropic roles. The Women Donors Network and Women Moving Millions are strong networks of women philanthropists, supporting each other with resources and networking both as women in philanthropy and as women interested in supporting women. For those interested in supporting women and girls, AWID

has a #fundher scorecard – a benchmark and accountability framework to assess the quality and quantity of the work by the funding and grantmaking community towards gender equality and women’s rights.<sup>127</sup>

has the power to stretch “the vision of what philanthropy can be about: more inclusive of a much broader array of issues, taking full advantage of the wisdom and expertise inherent in valuing all members of society.”<sup>130</sup>

## Moving the Field Forward

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The sheer immensity of issues that affect women and girls in a unique way can be intimidating. Experienced funders in this space such as the Channel Foundation promote the use of a gender lens in grantmaking so funders are trained to consider the female perspective in any type of grantmaking. In their article, “Beyond the Status Quo,” Katrin Wilde and Jane Barry emphasize the importance of this gender lens as part of the Gender and Global Grantmaking Initiative. “(Its) most important lesson was this: bringing a gender lens to global grantmaking implies

As Jody Myrum from the NoVo Foundation shares, “girls are not a monolith,” and support for them should not treat them in such an isolated way. This more complex approach, while complicated and messy, has the power to stretch “the vision of what philanthropy can be about: more inclusive of a much broader array of issues, taking full advantage of the wisdom and expertise inherent in valuing all members of society.”

a political and power analysis. First, we must recognize and challenge ingrained resistance to gender equality – including our own... Many Initiative participants said that it is only through consistently supporting women’s leadership and inclusion in decision-making that the scales of gender inequality and injustice will begin to balance.”<sup>128</sup>

An intersectional lens to women and girls’ issues is a key part of this work. As Jody Myrum from the NoVo Foundation shares, “girls are not a monolith,” and support for them should not treat them in such an isolated way.<sup>129</sup> This more complex approach, while complicated and messy,

## Final Thoughts

There is a common theme woven throughout the issues discussed above. The right to safe drinking water, to safety and life as refugees, and to equal rights as women and girls are all critical, fundamental human rights that can be nurtured and upheld through support from private philanthropy. The challenges facing 844 million people living without access to safe drinking water, 70 million refugees and displaced people, and countless women and girls around the world are daunting. Thoughtful approaches by funders of all sizes highlight the powerful role that philanthropy is playing every day to address these issues and support these populations. While there is much work still to be done, the progress highlighted in this publication is inspiring.

Funders are able to uniquely contribute to the greater good of the world and its people through a commitment of time, talent, and treasure. This ability is a gift that bears significant responsibility yet also offers opportunities for great joy and satisfaction in contributing to solutions to some of the most pressing issues of our time. As the world becomes increasingly interconnected, funders are also becoming increasingly generous and sophisticated in their approach to philanthropy. Funders continue to express interest in connecting with others to share their knowledge and to learn from each other, as witnessed by the surge of affinity groups, giving circles, conferences, and platforms such as the Sustainable Development Goals. Giving and learning collaboratively with other funders and grantees results in collective efforts that have the potential to be even more impactful.

As the challenges facing our world are growing in significance, so, too, is the desire to make a difference. The emergence of new data, new technology, and new ideas is resulting in more thoughtful, impactful, and hopeful philanthropy. Philanthropy is evolving and while the essential practices highlighted in this report are not new, we are witnessing greater humility, openness to learning from others, and thoughtfulness in philanthropic strategies and approaches. At the core of this evolution is the increased understanding that trust and human relationships are at the heart of philanthropy. Today's thoughtful philanthropists recognize the importance of building networks and listening deeply, intentionally, and continuously.

# The Thoughtful Funder's Checklist For Global Giving

The philanthropic challenges, strategies, and lessons learned that are shared throughout this report can be applied to a multitude of other global issues. Our hope is that all funders can use this resource in their journey to achieving meaningful, strategic, high-impact philanthropy around the world.

## Questions to Consider

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✔ **Focus** – What issues, geographies, and/or populations align with the mission and goals for your philanthropy and values (or your foundation or company)? What are the short and long-term goals?

✔ **Context** – What is the scope and nature of the issue and what are the emerging trends? What are the most urgent needs, gaps in funding, and opportunities? Who are the funders and other key actors and stakeholders who are addressing the issue? What are the strategies and lessons learned from these stakeholders? Where and how has philanthropy helped catalyze sustained impact and when has it been less successful? What are the lessons learned? What are the local laws governing philanthropy and civil society that could impact your global giving?

✔ **Entry Strategy** – What aspect of the issue are you (or your foundation or company) uniquely suited to address? What financial and other resources can you deploy? What do you envision your role as funder to be at the beginning and how might it evolve over time? What stage in an organization's evolution do you want to support (e.g., seeding early stage efforts, testing proof of concept, scale-up of effective models)? What strategies (such as grantmaking, convening, advocacy, policy, collaboration) will you invest in as a funder?

✔ **Collaboration and Leverage** – Who are your potential partners? What type of relationship do you want to cultivate with grantees and other partners? You can find like-minded donors through affinity groups and through the UN Sustainable Development Goals.

✔ **Learning and Evaluation** – How will you incorporate learning and assessing impact into your funding approach? What resources are available for further learning and/or partnering with others? Who (both internally and externally) should be kept informed of progress? How will you share lessons learned with others in the field, including local stakeholders? How will you use lessons learned to inform future strategy?

✔ **Exit Strategy** – How long do you envision committing to the issue area and/or individual grantee partners? What would a successful exit strategy look like? Do you envision other key actors or funders taking over when you exit (e.g., the government, local community, other partners)? What needs to be in place for a successful transition? Alternatively, if your investments or strategies fail, how will you know? How will you mitigate against the risk of causing harm, and other potential risks?

## Potential Strategies

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✔ **Intentional Responsiveness** – The report highlights the need for funders to be focused and strategic, yet flexible and responsive to local communities' and grantees' needs and opinions. It is often easier for small funders with less internal bureaucracy to achieve this balance, but even large institutional funders are adapting their practices to allow room for flexibility with grantees while still being strategic in their approach. Investing time into purposeful strategies to improve the donor grantee relationship while also achieving impact is essential for thoughtful global giving.

✔ **Well-Informed Risk** – Funders are uniquely suited to become early adopters, fill gaps, and support new ideas that can be risky, often called venture philanthropy. One key to this approach is to evaluate and document the effort so the grantee and funder can provide proof-of-concept and entice other funders or government entities to scale or bring the concept to the mainstream.

✔ **Scale and Sustainability** – Through thoughtful research and field work, funders can identify effective organizations that are only reaching a fraction of their potential, and invest in their sustainability and scale. Knowing that scale without sustainability and impact will lead to failure or continued reliance on outside funding, thoughtful funders work with their grantee partners to achieve a balance of all three.

# The Thoughtful Funder's Checklist For Global Giving

*Continued*

## Potential Strategies

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- ☑ **Leverage and Collaborate** – Start by looking for like-minded partners. Who else is funding the organizations or issues you care about? Conduct a landscape scan or tap into existing affinity networks including the SDG funders platform. Look for opportunities to learn from one another and to collaborate on moving an issue forward – avoiding duplication.
  
- ☑ **Deployment of All of Your Resources** – The section on Powerful Practices of Thoughtful Funders addresses the concept of deploying foundation assets for impact investing and mission-aligned investing. In addition to financial resources, funders have other valuable resources to share with grantee partners, such as connections to other funders, social media platforms, and technical assistance. Increasingly funders are partnering with grantees over a multi-year timeframe and investing in their capacity in comprehensive ways.
  
- ☑ **Grassroots and Intermediate Organizations** – Global issues require grassroots, community-led solutions for sustainable results. At the same time, for local organizations to be effective and protected from autocratic governments, humanitarian crises, or human rights violations, trusted and respected global organizations and intermediaries also play important roles. Funders can create a portfolio approach to funding both local and global solutions.

# Helpful Resources

## Repositories, Networks, Associations, and Conferences

	Topics in this Report					
	To Read Up	To Network & Learn from Others	To Fund Collaboratively	WASH	Refugees	Women & Girls
Africa Grantmakers Affinity Group <a href="http://www.africagrantmakers.org">www.africagrantmakers.org</a>		X				
African Philanthropy Forum <a href="http://www.africanpf.org">www.africanpf.org</a>		X	X			
Africa Philanthropy Network <a href="http://www.africaphilanthropynetwork.org">www.africaphilanthropynetwork.org</a>		X				
Ariadne <a href="http://www.ariadne-network.eu">www.ariadne-network.eu</a>		X				
AWID <a href="http://www.awid.org/">www.awid.org/</a>	X	X				X
Big Bang Philanthropy <a href="http://www.bigbangphilanthropy.org">www.bigbangphilanthropy.org</a>		X	X			
Council on Foundations Global Philanthropy <a href="http://www.cof.org/program/global-philanthropy">www.cof.org/program/global-philanthropy</a>	X	X				
EDGE Funders Alliance <a href="http://www.edgefunders.org">www.edgefunders.org</a>		X				
EDGE Funders Alliance Gender Justice Initiative <a href="http://www.edgefunders.org/gender-justice-initiative">www.edgefunders.org/gender-justice-initiative</a>	X	X				X
Environmental Grantmakers Association <a href="http://www.ega.org">www.ega.org</a>	X	X				
Global Philanthropy Forum <a href="http://www.philanthropyforum.org">www.philanthropyforum.org</a>		X				
Global Philanthropy Environment Index <a href="http://www.globalindices.iupui.edu/environment/index.html">www.globalindices.iupui.edu/environment/index.html</a>	X					
Grantmakers Concerned with Immigrants and Refugees (GCIR) <a href="http://www.gcir.org">www.gcir.org</a>	X	X			X	
International Funders for Indigenous Peoples <a href="http://www.internationalfunders.org">www.internationalfunders.org</a>	X	X				
Human Rights Funders Network <a href="http://www.hrfn.org">www.hrfn.org</a>	X	X				
Migration Data Portal, SDGs <a href="http://www.migrationdataportal.org/sdgs">www.migrationdataportal.org/sdgs</a>	X				X	
New England International Donors (NEID) <a href="http://www.neidonors.org">www.neidonors.org</a>		X	X			
netFWD, Global Network of Foundations Working for Development <a href="http://www.oecd.org/site/netfwd">www.oecd.org/site/netfwd</a>	X	X	X			

# Helpful Resources

## Repositories, Networks, Associations, and Conferences *continued*

	Topics in this Report					
	To Read Up	To Network & Learn from Others	To Fund Collaboratively	WASH	Refugees	Women & Girls
Pangea Giving Circle <a href="http://www.pangeagiving.org">www.pangeagiving.org</a>		X	X			
Peace and Security Funders Group <a href="http://www.peaceandsecurity.org">www.peaceandsecurity.org</a>	X	X				
Philanthropy Advancing Women's Human Rights (PAWHR) <a href="http://www.pawhr.org">www.pawhr.org</a>		X	X			X
Philanthropy Women <a href="http://www.philanthropywomen.org">www.philanthropywomen.org</a>	X					X
Prospera International Network of Women's Funds <a href="http://www.prospera-inwf.org">www.prospera-inwf.org</a>	X		X			X
SDG Funders <a href="http://www.sdgfunders.org">www.sdgfunders.org</a>	X					
SDG Philanthropy Platform <a href="http://www.rockpa.org/project/sdg">www.rockpa.org/project/sdg</a>		X				
Skoll World Forum <a href="http://www.skoll.org/skoll-world-forum">www.skoll.org/skoll-world-forum</a>		X				
United Nations Global Compact <a href="http://www.unglobalcompact.org">www.unglobalcompact.org</a>	X	X				
WASHFunders.org <a href="http://www.washfunders.org">www.washfunders.org</a>	X	X		X		
Women Deliver <a href="http://www.womendeliver.org">www.womendeliver.org</a>	X	X				X
Women's Funding Network <a href="http://www.womensfundingnetwork.org">www.womensfundingnetwork.org</a>		X	X			X
Women Moving Millions <a href="http://www.womenmovingmillions.org">www.womenmovingmillions.org</a>		X				X
Worldwide Initiative for Grantmaker Support (WINGS) <a href="http://www.wingsweb.org">www.wingsweb.org</a>	X	X				

## Interviewees

**Kylene Anthony**  
*Senior Social Responsibility  
Initiatives Representative*  
Caterpillar Foundation

**Brian Arbogast**  
*Director of Water, Sanitation,  
and Hygiene Program*  
Bill & Melinda Gates Foundation

**Michele Frix**  
*Chief of Staff*  
Seattle Foundation

**Sarah Hedley**  
*Head of Programmes*  
Stone Family Foundation

**Eva Kolodner**  
*Regional Director, East*  
Global Fund for Women

**Jody Myrum**  
*Director, Initiative to Advance Adolescent  
Girls' Rights*  
NoVo Foundation

**Shalini Nataraj**  
*Vice President of Programs*  
Ing Foundation

**Emily Nielsen Jones**  
*Founding Partner & Trustee*  
Imago Dei Fund

**Edwin Ou**  
*Director, Funder Alliances*  
Skoll Foundation

**Samuel Passmore**  
*Program Director, Environment*  
Charles Stewart Mott Foundation

**Aryah Somers Landsberger**  
*Vice President of Programs*  
Grantmakers Concerned with  
Immigrants and Refugees

**Victoria Stewart Todd**  
*Deputy Director*  
The One Foundation

**Eric Stowe**  
*Founder & Director*  
Splash.org

**Negar Tayyar**  
*Director*  
The Global Whole Being Fund

**Larry Tobin**  
*Director*  
Shapiro Foundation

**Keely Tongate**  
*Co-Director*  
Philanthropy Advancing Women's  
Human Rights (PAWHR)

**Judy Weiss**  
*President*  
Samuel Rubin Foundation

**Gary White**  
*CEO & Co-founder*  
Water.org

**Katrin Wilde**  
*Executive Director*  
Channel Foundation

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