REPORT 2023

WINGS' Enabling Environment Fund for Philanthropy:

An Experience of Participatory Grantmaking to Expand the Philanthropy Space

W I N G S
ELEVATING PHILANTHROPY

CREDITS AND ACKNOWLEDGEMENTS

Published by WINGS in June 2023 as part of the project 'Unlocking Philanthropy's Potential: Enhancing the Enabling Environment, Effectiveness and Leveraging the Contributions of Philanthropy Actors'.

This publication was produced with the financial support of the European Union (EU). Its contents are the sole responsibility of WINGS and do not necessarily reflect the views of the European Union.

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WINGS is the only global network of philanthropy support and development organisations. We are a community of over 200 philanthropy associations, networks, academic institutions, support organisations, and funders, in 58 countries, who are committed to growing and strengthening philanthropy to ensure that it reaches its fullest potential as a catalyst for social progress. We are committed to ending inertia, breaking down silos, challenging conventional wisdom, and creating an enabling environment for philanthropy to flourish.

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Introduction

WINGS is the only global network of philanthropy support and development organisations. We are a community of thought leaders and changemakers who are committed to growing and strengthening philanthropy to ensure that it reaches its fullest potential as a catalyst for social progress. We are committed to end inertia, break down silos, challenge conventional wisdom and create an enabling environment for philanthropy to flourish. Our goal is to encourage collaboration and ignite potential – to rally philanthropic actors everywhere to build a more just, equitable and sustainable world.

Our diverse and interconnected community of more than 200 philanthropic associations, networks, support organisations, academics and funders in over 58 countries represent a unique community of practice and a global platform to elevate the voice, visibility and value of philanthropy.

Enabling environment advocacy strategy

The WINGS advocacy strategy was launched in 2022 (as part of the European Union co-funded project 'Unlocking Philanthropy's Potential'), to channel and amplify the collective voice of philanthropy to **strengthen the enabling environment** for philanthropy. This advocacy strategy ultimately supports the diversity, independence, and active role of civil society in development and social change, collaborating with the various giving practices and institutions that constitute philanthropy, and other civil society actors. To be an effective actor for development, civil society requires an enabling environment, as key global stakeholders and governments have now recognised.

For philanthropy, the definition of enabling environment has three tiers, including conditions to:

- **Exist and operate.** This refers to the legal and fiscal frameworks that include registration, access to banking, civic space, the right of association, funding mechanisms, 'do no harm' by governments, clear and fair regulations, and doable practices and processes to operate.
- **Grow.** Enabling philanthropy to be diverse, develop its volume, organise itself, and better manage increasing flows, partnerships, and programmes. This requires regulations that allow access to resources (in and out of the country, such as cross-border funding), tax incentives or other support, ways to build capacity and improve the ecosystem or infrastructures of support, a favourable narrative to build trust, and ways to grow a culture of giving.
- **Strengthen and catalyse impact.** This includes processes of data collection, monitoring and learning; making better use of resources, creativity and building on best practices; and facilitating broader sustainable giving, such as with digital technology, a voice in public decision-making, constructive and informed policies, and internal standards of transparency and accountability. These conditions require multi-stakeholder collaboration, including with the public and private sectors, well-articulated philanthropy networks, and mechanisms and actors that scale and boost the impact of philanthropy and leverage its expertise.

In line with the advocacy strategy, WINGS works to 1) develop global positions, policy analysis and recommendations; 2) build local capacity for advocacy; 3) facilitate relations and collaboration with other alliances and networks, and a seat in global forums, also enabling member participation and 4) advocate, representing the global voice of philanthropy. At the national and regional levels, the strategy focus is to build capacity, facilitate peer exchanges, and share resources (including with the WINGS Enabling Environment Fund for Philanthropy), to enable members to be involved in self-initiated advocacy, partnerships, data collection and research, trust-building, and to enable dialogue and change in the public arena.

European Union project

In 2021, WINGS launched the project **'Unlocking Philanthropy's Potential: Enhancing the Enabling Environment, Effectiveness, and Leveraging the Contributions of Philanthropy Actors'**[1] funded primarily by the European Union (EU). The project aimed to build a stronger philanthropic sector that can generate and leverage resources, and thus effectively contribute to the accomplishment of the Sustainable Development Goals (SDGs). This project lasted 30 months and was completed in June 2023, with a budget of over EUR 1,330,000 (of which the EU contributed EUR 998,000).

To tackle enabling environment challenges, WINGS acted to improve its policy and advocacy capacity, establish global visibility as legitimate and useful, contribute to policies and positions, disseminate these widely, and advocate through strengthened partnerships. With this EU project, WINGS offered direct support to strengthen its own and its member philanthropy support organisations' (PSOs) capacity and influence, engagement, and success in advocacy. Beyond tackling its environment, WINGS and its members also worked to research, build consensus, and reinforce philanthropy's own principles of development effectiveness, transformation, transparency, and accountability. Finally, WINGS worked to increase philanthropy's engagement and impact on the SDGs, to leverage the sector's various resources for development (innovations, specific expertise, financial and non-financial resources, networking, and outreach capacity). Focusing on climate change and gender, work was done to increase the number of members engaged, with peer learning, promotion, and support for action. As part of this EU project, the Enabling Environment Fund was implemented.

1 Ref. CSO-LA/2020/418-063

The Enabling Environment Fund for Philanthropy

WINGS provided financial support to some of its members through a regranting scheme, with a call for proposals, as a core part of the 'Unlocking Philanthropy's Potential' project. The 'Enabling Environment Fund for Philanthropy' intended to improve the quality of the enabling environment of philanthropy, helping it to thrive, by strengthening the work of WINGS members at the regional and national levels in emerging/developing countries, and enabling their local/regional activities. This Fund had a long-term aim to help direct more resources to the SDGs, and thus escalate the impact of the philanthropic sector to provide alternatives to foreign funding, and overcome barriers in contexts of shrinking space for civil society and philanthropy. It also aimed to address the current global imbalance in the support ecosystem for philanthropy, enabling capacity building, learning, partnering and joint initiatives.

The Enabling Environment (EE) Fund for Philanthropy specifically targeted initiatives that have a direct or indirect effect on the EE, or objectives relevant or useful to improving the EE — whether advocacy; public policy; engagement with authorities; governance; transparency and accountability; capacity building; network or partnership building; or strengthening the outreach, research, knowledge, narrative or space of philanthropy in a given context. It prioritised bold and creative projects that would trigger local and regional actions, above all where philanthropy freedom is most at risk. Part of the Fund was targeted to enable more resources to issues and engagements connected to the SDGs (particularly gender and climate).

Funding was planned to be allocated in grants of three types: micro (from EUR 3,000 to EUR 8,000), medium (from EUR 8,000 to EUR 15,000), or larger (from EUR 15,000 to EUR 30,000). All projects had to meet the requirements of:

- A direct or indirect effect on, or activities relevant to the EE for philanthropy, or increasing resources and responses to gender or climate initiatives;
- WINGS members as lead applicants only, with some financial and organisational capacity;
- PSOs as actors had to be serving lower- to middle-income, and underserved countries with extreme challenges to the EE;
- Diversity in terms of geography, size, and type of PSO.

The sub-grant selection process

A collective participatory selection process involving members was chosen (see a description in the following box). This reflects WINGS' core values: "At WINGS, we believe that people and their communities, geographic and otherwise, must be at the heart of everything we do. As such, we aspire and strive to live our organisational values every day". The participatory approach also reflects principles of ownership in development, trust, and distributing power, which have been highlighted among the top 10 transformative principles for the future of philanthropy and its effectiveness[2].

Deciding Together: Shifting Power and Resources through Participatory Grantmaking: **Grantcraft.**

Participatory grantmaking cedes decision-making power about funding decisions—including the strategy and criteria behind those decisions—to the very communities that a philanthropy aims to serve.

- Shifting power about grantmaking decisions by involving—or giving all power to—the people most affected by the issues or problems.
- Empowering and giving agency to people who benefit from funding to determine the priorities of their lives.
- Emphasising 'nothing about us, without us'.

2 See the Philanthropy Transformation Initiative

After a wide call for expression of interest in participation, there were eight members in the peer-to-peer sub-grant selection committee[3]: three from Africa, two from Latin America, one from Asia, one from Eastern Europe/Middle East, and one from the EU. Among the committee members, four were from organisations[4] that also applied for the Fund. The selection committee participated in information sessions and received selection guidelines. Each project was evaluated by three or four committee members. To avoid conflict of interest, members did not evaluate their own proposals, or proposals from their countries. WINGS also assigned the evaluators according to their expertise. Each evaluation included a rigorous individual scoring method, followed by full committee comparison and discussion meetings. The process was carried out over a period of about a month. The committee considered the proposals and projects' consistency and clarity of objectives and activities, feasibility, relevance to the Enabling Environment Fund for Philanthropy, and the capacity of the organisations. In cases of ties or lack of funds, preference was given to grants implemented in countries that had not yet been covered by other grants, and applicants who were not direct partners of other applicants. There were two calls for proposals — 13 applications were received for the first call, of which 11 were accepted, and eight applications were received for the second call, of which five were accepted.

A member of the peer-to-peer sub-grant selection committee, who appreciated the process, said: *"This participatory approach to granting was very good, and it was not something that could be found in other instances"*. Another said: *"This experience gave me a lot of valuable insight".*

3 Ben Ocra, Ghana Philanthropy Forum, Ghana; Birce Altay, Third Sector Foundation of Turkey (TUSEV), Turkey; Caroline McLaughlin, AVPN, Singapore; Eme Iniekung, Philanthropy Circuit, Nigeria; Gracia Goya, Hispanics in Philanthropy, Mexico; Hanna Surmatz, European Foundation Centre, Belgium; Jackie Asiimwe, CivSource, Uganda; and João Paulo Vergueiro, ABCR, Brazil.

4 ABCR, AVPN, CivSource and Ghana Philanthropy Forum.

Overall results of the Enabling Environment Fund

A total of 16 grants were awarded: 11 in the first call for proposals (EUR 203,496 in total), and five in the second call for proposals (EUR €128,829 in total), with an overall total of EUR 332,325. There were seven larger grants allocated (around 30,000 €) — of which six were for multi-country initiatives, and nine medium grants (around EUR 15,000 €).

Grants per regions, grant size and countries

AFRICA	ASIA	EASTERN EUROPE	LATIN AMERICA AND THE CARIBBEAN	MIDDLE EAST	TOTAL
6	2	2	5	1	16
2 large multi-country grants, 1 large national grant, 3 medium national grants	Medium grants, one with regional reach	Medium grants with national reach	3 large multi-country grants, and 2 medium grants with national reach	Large multi-country grant	
Implemented in Uganda, Ghana, South Africa, Botswana, Eswatini, Malawi, Lesotho, Namibia, Mozambique, Tanzania, Zambia, and Zimbabwe, and all of Sub-Saharan Africa	Implemented in Philippines and Indonesia	Implemented in Albania and Ukraine	Implemented in Colombia, Peru, Ecuador, Brazil, and whole Latin American region	Implemented in Egypt, Lebanon, Jordan, and Palestine	

Main themes and objectives of the grants per region						
	AFRICA	ASIA	EASTERN EUROPE	LATIN AMERICA AND THE CARIBBEAN	MIDDLE EAST	TOTAL
Public policy, regulations, and advocacy	2	-	1	2	1	6
Mapping philanthropy actors	2	-	-	-	-	2
Building trust and knowledge about philanthropy	-	2	1	-	-	3
Building the philanthropy ecosystem, partnerships and coalitions	2*	-	-	3**	-	5

* 1 grant for youth philanthropy, 1 grant focusing on transparency, accountability and efficiency
** 2 grants for climate, 1 grant focusing on gender

All projects lasted between six and 12 months. The main activities included seven research projects, nine projects providing knowledge products, eight partnership building projects, seven capacity building projects, six advocacy engagement projects, and four projects building digital platforms and/or tools.

Capacity building was provided. Initially, all grantees received introductory financial and project management training. Later, 24 members from the organisations that received sub-grants (three in Asia-Pacific, three in Europe, six in Latin America, and 12 in Africa) participated in the three sessions of the 'Good financial practices for grant management workshops' (in January, February and September 2022). In 2023, 12 staff members from five sub-grantees[5] (one in Europe, one in Latin America, and three in Africa) participated in the 'Finance and fundraising for WINGS members' sessions, including group sessions and tailored individual support, based on the needs of each organisation. Additionally, one sub-grantee in Latin America received a scholarship for around 27 of its staff members from Argentina, Colombia, Costa Rica and Mexico to receive enabling environment capacity building support, in order to develop a business strategy, design efficient interactions between actors of the social impact investment ecosystem, and ensure funding will reach its fullest potential.

All projects met their objectives, with a few exceeding expectations. As a result, philanthropy became better understood; trust and capacity were built; knowledge was deepened about Enabling Environment policies and how to address them; partnerships were developed, including across sectors; and relations were built with authorities which, in some cases, helped to facilitate future successful advocacy.

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5 CivSource Africa, Ghana Philanthropy Forum, Innpactia, Partners Albania for Change and Development and SIVIO Institute.

Project summaries

First call

1

Mapping the philanthropy support ecosystem in Sub-Saharan Africa, African Philanthropy Network (APN)

Amount: EUR 30,000
Implemented in: Sub-Saharan Africa

Objective: Engage APN members and other relevant stakeholders in a participatory mapping process, to identify the challenges and opportunities of a strong support ecosystem for philanthropy in the Sub-Saharan region. Unlocking philanthropy's potential requires a strong and diverse infrastructure that delivers a broad array of services and contributes to the development of local philanthropy in effective ways. For this, understanding about the existing infrastructure and its needs must first be enhanced, and followed by strategy development on how to strengthen it.

Main achievements: Additional co-funding of EUR 15,757 was obtained. APN developed a digital visualisation map for PSOs in Sub–Saharan Africa, including the 569 actors initially identified. The mapping method was built on the 2013 Sizing the Field Study and research conducted by other pan-African institutions such as the Centre on African Philanthropy and Social Investment (CAPSI), TrustAfrica, African Philanthropy Forum, African Women's Development Fund (AWDF), CivSource-Africa, and EPIC Africa; with help from international actors such as Mott Foundation, Charities Aid Foundation (CAF), and WINGS. Three reports on East Africa, West Africa, Southern Africa, and Central Africa were also developed. These reports present current information on the nature, trends, and ongoing practices of PSOs. This research information was then synthesised into a Mapping Report of the sub-Saharan African region.

2 Fostering an enabling environment for philanthropy in Uganda,

CivSource-Africa

Amount: EUR 15,000
Implemented in: Uganda

Objective: Influence the narrative and practice of philanthropy in Uganda and support the sensitisation of policy makers and advocacy.

Main achievements: CivSource-Africa reignited conversations about local philanthropy and its role in national development, and explored its policy and regulatory framework. Partnerships were strengthened with like-minded organisations to further the enabling environment for philanthropy in Uganda. An Enabling Environment Working Group was formed, partnering with the Philanthropy Forum Uganda. Based on a policy review, advocacy was carried out to improve the institutional framework for local philanthropy in Uganda. Strategies and actions were recommended to fill the gaps and strengthen the environment for local philanthropy. *See further details on page 23.*

3 National mapping and strengthening of processes towards a resilient philanthropy ecosystem in Ghana,

Ghana Philanthropy Forum

Amount: EUR 14,888
Implemented in: Ghana

Objective: Undertake a national mapping and strengthening process of the Ghanaian philanthropy ecosystem.

Main achievements: Desk research was conducted to assess the space and identify stakeholders who qualify as key ecosystem players. Using a specifically-developed data collection template, a detailed report which included important details on Ghana's philanthropy ecosystem, a worksheet, and a visual map illustrating key actors in the philanthropy ecosystem were produced. The project was presented at events, such as stakeholder partner meetings and workshops, and is intended to help philanthropy become more organised to address the sector's needs and interests.

4 **Data for an enabling environment for Arab civil society,** Arab Foundations Forum

Amount: EUR 30,000
Implemented in: Egypt, Lebanon, Jordan, and Palestine

Objective: Design and implement mapping of the nonprofit sector's legal, financial, and governance space, and to build the capacity of philanthropic actors to use data to enhance impact and meaningful advocacy, towards a more effective and strategic philanthropic ecosystem.

Main achievements: Comprehensive data mapping was designed and implemented in Egypt, Lebanon, Jordan, and Palestine, covering legal, financial, and governance factors. The report, which was launched in a webinar with over 45 participants from the region, stimulated discussion about how to bridge research findings with practice. It tapped into local insights and expertise on the changing ecosystem and civic space. Expanding on the report findings and priority areas for action, two capacity building workshops were provided. Two articles were produced to further the discussion: *New research sheds light on the critical role of an enabling civic space for economic and social recovery in the Arab Region* and *The power of data.* *See further details on page 26.*

5 **Promoting knowledge sharing and transparency in philanthropy in South Africa,** Independent Philanthropy Association of South Africa (IPASA)

Amount: EUR 14,596
Implemented in: South Africa

Objective: Promote knowledge sharing about the design and implementation of a funding strategy, for enhanced trust, transparency, and efficiency of philanthropy in South Africa.

Main achievements: The transparency theme was integrated throughout all activities in 2022, including five online workshops (covering transparency, due diligence, good governance, community focus, capacity building, and institutional strengthening); three discussions, for members to engage in high-level dialogue on transparency and accountability, expanding the scope of trust-based philanthropy, and shifting the power towards decolonising philanthropy; two board training workshops; and three in-person workshops in partnership with the National Association of Social Change Entities in Education, with a total of over 200 participants. Six event-related knowledge products and regular newsletters were also disseminated, including *Good Governance and Foundations*; *Grant Craft Toolkit*; *Trust-based philanthropy: A growth pack to support trust-based partnerships*; and *Trust-based philanthropy: A case study of emerging collective partnership between a philanthropic network and a national association of social change entities in South Africa.*

6 **Gaining back public trust in foundations and non-governmental organisations in the Philippines**, Association of Foundations

Amount: EUR 14,625
Implemented in: Philippines

Objective: Foster an Enabling Environment for philanthropy in the Philippines, by raising public awareness about the significant contribution of foundations and non-governmental organisations (NGOs), and to enhance individual, community, and national development, thereby increasing public credibility and trust.

Main achievements: Additional co-funding of EUR 3,805 was obtained. A strategic communication plan was developed, and a staff member was hired to implement it. The institutional website was redesigned to improve the user interface and enhance visual appeal. Member data and success stories were collated and shared through the online monthly newsletter, website, and social media. Media engagement was initiated to encourage dialogue about the Association of Foundations, the broader philanthropic sector, and its role in development. Conversations about the state of giving in the Philippines and trust in the sector were initiated with a new generation of young philanthropists. *See further details on page 27.*

7 **AVPN Global Conference 2022: Session support in Indonesia,** AVPN Indonesia

Amount: EUR 15,000
Implemented in: Indonesia

Objective: Curate, inform, and catalyse strategic philanthropy, and encourage collaboration between international and local impact-orientated initiatives to create impactful solutions, bringing together philanthropists and social investors.

Main achievements: The session 'Unlocking Philanthropy's Potential by Enhancing the Enabling Environment in the Global South' was presented at the 2022 AVPN Global Conference in Bali, Indonesia, with 115 participants, and further disseminated on YouTube. Speakers were invited to share their perspectives and encourage capital providers to be bold and impactful with their social investments in the Global South. The insightful panel discussion featured input from Heather Grady, Rockefeller Philanthropy Advisors Vice President; Andy Annett, Unreasonable Group Regional Manager, Asia-Pacific; Romy Cahyadi, Instellar CEO; and Clare Woodcraft, International Venture Philanthropy Centre (IVPC) CEO and Centre for Strategic Philanthropy Fellow.

8 **Advocacy for endowments in Brazil**, Charities Aid Foundation (CAF) – Institute for Development of Social Investment (IDIS)

Amount: EUR 14,508
Implemented in: Brazil

Objective: Influence the regulation of legislation on endowments and disseminate the concept.

Main achievements: Additional co-funding of EUR 35,471 was obtained. Following an endowment law that IDIS helped to pass in 2019, the project focused on education about the law and advocacy to influence the related regulations (for example, expanding the sectors/causes affected), ensuring its effective implementation. Concepts such as tax immunity for endowments, and tax incentive law for culture, were disseminated in Brazil. A new publication on the current state of endowments was launched, and over 1,000 printed and digital copies were shared. In-person events targeting representatives of endowment funds in Rio de Janeiro, Brasília and São Paulo convened over 100 guests. The project developed mechanisms to strengthen fundraising, focusing on privatisation. This coalition initiative reached 100 members.

9 **Brazilian NPO Coalition on Financial Action Task Force,** Brazilian Association of Fundraisers (Associação Brasileira de Captadores de Recursos - ABCR)

Amount: EUR 13,914
Implemented in: Brazil

Objective: Ensure the adequate implementation of the Financial Action Task Force (FATF) recommendation 8 in Brazil, strengthening the coalition of nonprofits working to guarantee it.

Main achievements: Additional co-funding of EUR 4,800 was obtained. The Brazilian NPO Coalition on FATF was consolidated. ABCR increased relations with relevant government stakeholders, such as the Financial Intelligence Unit. Awareness was raised about the sector, improving dialogue with the central Government and state agents that will be supervising the incoming mutual evaluation of FATF and the Financial Action Task Force of Latin America (GAFILAT) in 2023. A baseline study about FATF and the reccomendation 8, and a report with recommendations on the issue were produced. As a result of the Coalition's work and this project, ABCR became the official representative of the nonprofit sector in the ongoing dialogue with the Government about the country's compliance with reccomendation 8. *See further details on page 25*.

10 Climate Action Philanthropy Amazon Cross-Border Working Group, Latimpacto

Amount: EUR 28,499
Implemented in: Colombia, Peru, Ecuador, Brazil

Objective: Improve trans-border dialogue that will allow for the flow of philanthropic knowledge and funds among the countries that harbour the Amazon rainforest. This will allow for more philanthropic capital to be deployed, increase harmonisation and collaboration, reduce duplication, and foster knowledge transfer in the region.

Main achievements: A cross-border coalition was formalised, and its capacity built. Local Amazon Impact Ecosystems (starting in Peru, Colombia and Ecuador) are now aligned, following and adapting the model and learnings from the more advanced Brazilian Amazon Impact Ecosystem. This increased capital and resources coming from Amazon basin countries that were deployed in the Amazon region. Local and international resources are aligned and collaborating, achieving common learnings, and avoiding duplication, to increase responsibility, local ownership, and sustainable and scalable results. *A 2022 roadmap for the Amazonian, Cross-Border, Philanthropic Work Group on Climate Action* was produced along with the *Roadmap Building Methodology for the Amazonian, Cross-Border, Philanthropic Work Group on Climate Action.*

11 Enhancing cooperation to enable Albania's environment for philanthropic activity, Partners Albania for Change and Development

Amount: EUR 12,465
Implemented in: Albania

Objective: Contribute to the creation of a conducive legal and operating environment that supports philanthropic activity in the country.

Main achievements: Research was conducted on the legal and regulatory framework for philanthropy and its effects, presented in the paper *Conducive Environment for Philanthropy Activity in Albania*. The current legal framework has barriers, challenges, and does not encourage philanthropic activity in Albania. Three focus groups of 21 business representatives (from the Chamber of Commerce, Corporate Social Responsibility network, and others) participated in a presentation on the preliminary findings and shared their first-hand experiences. In-person meetings were then held with four chief financial officers of private financial and banking companies, to garner their feedback. All stakeholder recommendations were consolidated and presented in the final white paper and a regional forum was convened, bringing together 135 representatives from civil society organisations (CSOs), the public and private sectors, and European and global networks, enabling constructive multi-stakeholder dialogue.

Second call

1

Unleashing young people to Lift Up Philanthropy in Ghana, The Public-Private Lab Global Alliance for Development Foundation (GADeF) International

Amount: EUR 29,350
Implemented in: Ghana

Objectives: Contribute to the effective development and sustainable growth of philanthropy in Ghana, creating innovative partnerships among public, private, CSOs and local authority sectors. To strengthen African youth philanthropy members with peer learning, mentorship, and campaigns to grow a culture of giving with innovative technology that links donors and promotes collaboration between youth and sectors.

Main achievements: Additional co-funding of EUR 15,091 was obtained. The African Youth Philanthropy Network (AYPN) was organised and legally registered, with governance instated. AYPN's 3rd Leadership Conference was held, bringing together 27 participants. GADeF co-hosted the 3rd Ghana Giving Summit with more than 56 participants, also enabling a peer learning and networking session for AYPN members. Forty mentees from across Africa were mentored through the project, by 13 mentors, building capacity on themes of advocacy, partnerships, fundraising, communications, and digital tools. Web, social media, and mobile phone digital tools were developed with AYPN. A digital server platform is now being hosted, for information sharing and digital fundraising, for 40 mentees and 15 other GADeF members and youth-led organisations. Partnerships were developed between AYPN and CAPSI, the Centre for Strategic Philanthropy and Social Investment (CESPSI), the National Youth Authority, TechSoup and Giving Tuesday Ghana. Case studies profiling member success stories were produced.

2 **Understanding and enhancing the legal framework for philanthropy in Southern Africa,** SIVIO Institute

Amount: EUR 30,000
Implemented in: Botswana, Eswatini, Lesotho, Malawi, Mozambique, Namibia, South Africa, Tanzania, Zambia and Zimbabwe

Objective: Improve the operating environment for philanthropy initiatives in Southern Africa with the 'Ease of Doing Philanthropy Index' barometer.

Main achievements: Desk research was conducted, and a database was developed of 108 laws, policies, and measures that affect philanthropy practices across the 10 countries of study. Data collection fieldwork was carried out in the 10 countries, partnering with a network of researchers, and a survey of local philanthropy organisations. SIVIO then analysed how these measures incentive or disincentive philanthropy, and scored them, developing an 'Ease of Doing Philanthropy Index' based on all the findings. Finally, an online platform was created to share evidence and rank countries on the basis of their current public measures that promote or constrain philanthropy activities.

3 **Strengthening a Brazilian network of Philanthropy for Climate,** Group of Institutes, Foundations and Countries (Grupo de Institutos, Fundações e Empresas -GIFE)

Amount: EUR 29,978.67
Implemented in: Brazil, Latin America, and globally

Objective: Contribute to strengthening the Latin American philanthropy ecosystem's engagement and action in response to climate change (SDG 13), with an unprecedented collaboration and synergy of private social investors engaging in and educating on philanthropy, to increase the number of organisations actively fighting against climate change, and to strengthen integration, strategies, and practices.

Main achievements: Additional co-funding of EUR 29,466 was obtained. The philanthropy ecosystem in Latin America was strengthened, with the Brazilian sector as champion of the International Philanthropy Commitment on Climate Change. GIFE articulated the movement in Brazil, and worked as a catalyst with partners in the wider region, consolidating and expanding collaboration with key regional partners, such as Fundación Avina and Latimpacto. Eleven members provided support to the network. The Brazilian climate philanthropy ecosystem was also strengthened. Capacities, awareness, and cooperation were built, sharing peer learning and strategies, holding educational talks and roadmap meetings. A broad communication strategy was implemented. The project enabled the preparation, active participation, and follow-up of four different types of Brazilian social investors (non-climate attendees) in an international mission to COP27, thereby also deepening their engagement. This project led to new signatories to the climate commitment, and other new organisations engaging in the campaign. New social investors joined GIFE; relationships were built with the Brazilian government; and, with support from WINGS, important new international partnerships were formed, linking Brazilian social investors with, among others, Edge Funders, Foundations Platform F20, International Venture Philanthropy Center, Laudes Foundation, and BMW Foundation Herbert Quandt.

4 **Boosting gender-smart philanthropy and impact investing strategies, to encourage a more enabling environment in Latin America and the Carribean,** Innpactia

Amount: EUR 30,000
Implemented in: Latin America and the Caribbean

Objective: Contribute to the creation of gender-smart and gender-sensitive philanthropy and giving, transforming the way philanthropy and giving achieve sustainable investment that meets the needs of women and girls, and maximises effectiveness, to promote a more enabling environment for civil society to thrive in Latin America and the Caribbean.

Main achievements: Innpactia, partnering with Spira and Pro Mujer, produced video testimonies and reflections about common gender biases in investment practices. They designed a common methodology to raise awareness about gender bias among philanthropists and impact investors. Infographics were produced, based on dialogues from a collective session. An investigative report was produced, defining the gender biases in the region during the last three years. This serves as a baseline for the creation of evidence-based solutions and decision-making to advance a gender-smart approach to impact investment. Two online masterclasses were designed on gender-based factors across the investment process, targeting Innpactia's platform users (including philanthropists, donors, and investors). Awareness was raised about mainstreaming gender equity, and its benefits, as well as ways to be creative in philanthropy. A communication campaign was developed and initiated. *See further details in the case study on page 28*.

5 **Philanthropy in Ukraine platform,** Zagoriy Foundation

Amount: EUR 9,500
Implemented in: Ukraine

Objectives: Create and build a community of philanthropy actors in Ukraine, by collecting, mapping, and disseminating information about their projects on a web platform. This initiative creates opportunities for partnerships, networking, and training, and increases public trust in charitable organisations by disseminating factual information about audited organisations, helping to respond to their needs and providing opportunities for collaboration in the sector.

Main achievements: Zagoriy Foundation fully developed the web platform, which is ready to launch, and will include methodological tools for evaluating, engaging, and supporting charitable organisations. A philanthropy coordinating group strategised on the project. A communication plan and basic guidelines for social media and stakeholder promotion were created. However, considering the unprecedented challenging period that Ukraine is facing, the Board decided to adjust the focus of the Foundation's activities during the war, to address problems in the country, strengthening development work in the region. The following sub-grant activities were thus put on hold: launching the platform; mapping philanthropy and verifying funds; organising and engaging a permanent circle of support in funding and information; and a full communication campaign to promote and engage foundations and partners. Only the first tranche of the sub-grant was disbursed and implemented.

Selected projects in more detail

1 Fostering an enabling environment for philanthropy in Uganda

CivSource-Africa

Local philanthropy is developing rapidly in Uganda, with significant potential to transform how society is supported and developed. The enabling environment — one of the key pillars for growing philanthropy — is often hampered by a lack of information about philanthropy in all its forms; a knowledge gap on how the enabling environment can drive or hinder the true potential of giving; the lack of a regulatory framework to support the sector; and the stringent measures placed on donor funding by the government. *"As an organisation committed to supporting local philanthropy, CivSource-Africa knows that part of the scaffolding for such an enterprise is to have a sound legal and policy framework."*

With the support of WINGS and the EU, the aim was to reignite conversations on local philanthropy and its contribution to national development, and to strategise with key stakeholders on the country's regulatory framework, to influence the narrative and sensitise policy makers.

Much was accomplished in eight months. The survey report *The role of philanthropy in Uganda's national development* was published, disseminated, and launched in a panel with the private sector, CSOs, foundations, and 10 representatives from the National Planning Authority, increasing stakeholder awareness. Research on the regulatory framework affecting local philanthropy was disseminated and used to dialogue and seek solutions. A multi-stakeholder webinar was hosted to help mainstream philanthropy in Uganda's national development. This strengthened engagements with like-minded partners in the **Philanthropy Forum Uganda (PFU)** — a platform of philanthropists and PSOs. This led to the creation of its Enabling Environment Working Group (EEWG), and two consultative meetings consolidating its organisational purpose and strategy. Key areas of focus that emerged were to engage youth, CSO, and tax experts. Other small consultative meetings were also held. Building on the research, a working session was hosted on the legal and regulatory framework for philanthropy in Uganda, and how to navigate its gaps. The session convened 30 participants, including four authorities (two from the financial sector), 18 from CSOs, and six from PSOs. Some recommendations that emerged were to broaden the definition and study of philanthropy, and the scope of stakeholder engagements. Strategies and actions were identified to improve the policy framework and environment for philanthropy. The sensitisation of policy makers and advocacy was initiated on that basis.

The inclusive engagement of different stakeholders was one of the successes of the project. Three government agencies were targeted for sensitisation and participation: the Uganda Revenue Authority, the National Planning Authority, and the Ministry of Finance, Planning and Economic Development. Relations were successful for the first two, who participated in sessions and consultations, expressed the need for further dialogue on policy and tax initiatives, and committed to further active engagement. To promote private sector engagement and partnership, the Private Sector Foundation Uganda and Uganda Development Bank were invited, and four business leaders registered to be members of the PFU. Bridges were built with Philanthropy for Development – an initiative under the Uganda National NGO Forum — focusing on grassroots partners and giving for change, with the team lead becoming a member of the WINGS Enabling Environment Working Group.

The project faced challenges, including perceptions about philanthropy as a nascent sector, general lack of understanding about the sector, dialogue being relatively new, and, as in most African countries, barriers to collaboration with authorities (due to challenges such as political tension, sensitive topics, and limited participation of the public sector). However, the conversations have started, enabling further dialogue with policy makers, which the EEWG can continue. Work on awareness-raising, advocacy, and the consolidation of a joint working group will take time.

The critical success factors that emerged were the importance of a participatory, multi-stakeholder approach, and the availability of local recent data on the philanthropy sector (rather than generalising from global data) to overcome assumptions and clarify its varied nature and role in national development.

2 **Brazilian NPO Coalition on FAFT**

Brazilian Association of Fundraisers (Associação Brasileira de Captadores de Recursos - ABCR)

"When the project started, there was a lack of understanding, in the government, of what the nonprofit sector represents in the country, and how the FATF's recommendation 8 impacts the 815,000 organisations in the country." —ABCR

FATF — **the Financial Action Task Force** — is a formal global intergovernmental process to fight money laundering, terrorism, corruption, and ensure bank de-risking. Recommendation 8 of the FATF, refers to risks in civil society. It has been recognised to have significant direct unintended consequences for nonprofits, such as barriers to existence, limited access to the financial system, or blocked cross-border giving. FATF mandates periodic national peer assessments (Mutual Evaluation Reviews) with monitoring delegations. The FATF process can be influenced globally and nationally, although it is legalistic, technical, and not easily understood. Success usually requires working with allies and having in-depth policy reviews and rigorous data.

This 11-month project consolidated the **Brazilian NPO Coalition on FATF** — a national movement led by local organisations, focused on ensuring the adequate implementation of FATF reccommendations. It provided knowledge to help the Brazilian State in its implementation of recommendation 8. It aimed to sustain dialogue with the government on FATF issues for nonprofits, and to ensure enabling legislation. The EU grant and support from WINGS were essential.

Initial activities enabled the Coalition's communication outputs, with a brand identity, social media art and a series of posts, as well as launching the website. External experts surveyed and consolidated a baseline diagnosis of the Brazilian legislation, norms, and regulations, as compared to FATF reccomendations, tracking the ten years since the last mutual evaluation. This will provide a benchmark for other philanthropy coalitions globally, and facilitate in-depth understanding to plan strategic actions and to use in advocacy. A second report was produced to present the Coalition's official position and recommendations about the issue, targeted at the Brazilian central government and parliament, as well as other actors, including FATF (gobally), to ensure that the legal system adequately reflects the FATF reccomendations, without unnecessary provisions that negatively impact nonprofits.

A project objective was that the Coalition be recognised as a relevant player representing civil society on FATF issues, and framing the narrative on the theme, with increased relations with relevant government stakeholders, raised awareness, and improved dialogue. All this was achieved due to the Coalition's work and this project. Dialogue is now ongoing with the state agents that will be supervising the incoming FATF Mutual Evaluation in 2023. The Brazilian Financial Intelligence Unit (COAF) mentioned the Coalition in its internal reports. The Coalition also helped to revise guidelines that will be shared within the country. ABCR became the official representative of the nonprofit sector in the State's standing committee on the country's compliance with reccomendation 8, with monthly meetings gathering at least 20 state representatives. ABCR participated in these meetings and gave input on public documents prepared to answer FATF's evaluation. Although the FATF reccomendation is not yet properly implemented, there has been movement in that direction. More advocacy is needed.

A half-day online summit at the end of the project convened representatives from the government, Brazilian Central Bank, and nonprofits, to raise awareness and dialogue about the findings. A study of the relations between banks and NPOs (showing barriers in accessing financial services), the baseline survey, and the position and recommendations of the Coalition were publicly presented.

There were many challenges. ABCR had to carry the weight of the leadership of the Coalition, given partner turn-over and lack of resources. Most Brazilian philanthropy organisations lack understanding or do not pay attention to FATF issues, and there is also a lack of understanding within the government. Following recent elections of a new government, many connections must now be rebuilt. Representatives from private banks were also resistant to dialogue and did not attend the summit. In other meetings, they showed mistrust and expressed criticism of the nonprofit sector. Going forward, the Coalition will aim to present the survey and engage in dialogue with the Brazilian Federation of Banks. The report on non-profit organisations and banks will be disseminated nationwide and given media attention in the coming months. Effort will also go into increasing membership, visibility, and awareness about the Coalition, within the philanthropy sector.

Broader synergies also resulted from this project. With support from WINGS, ABCR took the lead in representing Brazil's work on this issue globally. In September 2022, ABCR joined the Global Hub of FATF and NPOs in Paris, under the lead of the European Center for Not-for-Profit Law, alongside members of 40 other countries from around the world.

3 Data for an enabling environment for Arab civil society

Arab Foundations Forum (AFF)

"Advocating for systems change towards a more Enabling Environment for Arab philanthropy and civil society that would empower it to deliver on its values of social justice and solidarity more effectively, is front and centre to AFF's project". —AFF

The project aims to generate robust, regionally owned data on the current state of the CSO ecosystem, focusing on the changes in policies, laws and infrastructure influencing Arab philanthropy in a pandemic context, in Egypt, Jordan, Lebanon, and Palestine. This will help to enhance effectiveness and impact, and contribute to a better enabling environment in the sector, moving knowledge and strategies forward, building awareness on the importance of quality data, and supporting a collective approach to research.

The study built on regional research and surveys on the civic space. It emphasised foregrounding local voices and civic actors', with 22 semi-structured interviews with diverse stakeholders (including foundations, infrastructure support, research organisations, academia, and civil society experts). A comprehensive map titled Enabling Arab Civic Space for Resilience, Growth and Sustainability was produced in English and Arabic, covering legal, financial, infrastructure, and governance factors. One general finding was the critical role of the Arab civic space for social and economic recovery from the Covid pandemic. "So far, it has yielded in-depth insights on challenges and opportunities for the functioning and sustainable growth of civil society, while also revealing reform priorities." An overarching finding was the strong linkages between the shrinking of civic space, the fluctuating growth of civil society (with a notable decline in human rights and advocacy-based organisations), and the lack of sustainable funding in all countries.

Forty-five participants from the region gathered to discuss how to bridge the report's findings with practice, tapping into local expertise on the changing ecosystem and civic space. Two blog posts on key Arab philanthropy and news platforms, and the use of a social media hashtag on 'data sharing' further disseminated the research. The priority areas for action identified from the research findings led to two capacity building workshops on 'Evidence-based advocacy' and 'Social impact assessments', addressing the lack of regulatory information, impact measurement, and data sharing by the sector.

"One of the biggest challenges faced by the project is the gaps in data, notably on the size and investments of CSOs and philanthropy, due to the lack of representative and comparative data collection efforts. AFF hopes that the project will help support an evidence-based collective advocacy strategy that inspires action for a more enabling environment for civil society."

To enhance the transparency and accountability of the sector, and further knowledge sharing, AFF has solidified partnerships with Dalberg, the Centre for Strategic Philanthropy at Cambridge, and Philanthropy Age. *"We will support the generation and dissemination of robust data on philanthropic practices and its ecosystem, enabling region-wide data collection and communication of a database on the 'who', 'what', and 'where' of Arab philanthropy."* The evidence will be updated to ensure long-term systematic tracking and assessment of the role of Arab philanthropy in development and social change. In the future, AFF intends to expand knowledge sharing and advocacy by including more philanthropic and civil society actors in dialogue about the enabling environment, and to continue strengthening the sector.

The key lesson that emerged from the project was that taking up the challenge of data collection, using evidence, and information sharing, must be a collective responsibility, anchored at the community level, taping into local voices and insights, and reaching global comparative exchanges, in order to be taken seriously and to enhance ownership, institutional learning and impact.

4 Gaining back public trust in foundations and NGOs in the Philippines

Association of Foundations (AF)

"Philanthropy thrives where there is credibility and trust. The 2019 Philippines Trust Index showed NGOs and foundations are the least trusted by the public." —AF

This seems largely due to the lack of public knowledge about philanthropy organisations and NGOs and their work.

Through this project, AF strove to foster a stronger enabling environment for philanthropy in the Philippines and to raise trust in the sector. This was done through a strategic communications initiative, by raising the public's awareness about the significant and important contributions that foundations and NGOs provide to enhance individual, community, and national development. The 12-month project grew AF's digital presence and reach, and communicated that AF is a trusted PSO, thereby supporting its members to become more effective.

Achievements began with the development of a strategic long-term communication plan to guide the project, a broader campaign, and stakeholder engagement. Using project funds, a temporary staff member was hired to implement the communication plan. A board communication committee with strong expertise was formed. This committee's contacts enabled some pro-bono creative support. A video and song were produced. A consolidated content calendar ensured sufficient content material, unified messaging, audience-appropriate material, and activities for the various communication platforms. The website was redesigned to improve the user interface and enhance visual appeal. It was relaunched at the end of the project. Graphic design was done in-house to save funds for the website and video. There is now a sufficient collection of content for all media channels, including relevant information highlighting the good work of NGOs and foundations. The section on transparency initiative promotes good governance. Internal and external newsletters have been refreshed and now include member stories showing the tangible impact of their work. These stories have been supplemented with attractive visuals, to help increase audience interest. The e-newsletters, AF Exchange and AF Links, facilitate weekly sharing.

The various media channels reinforce each other. Newsletters, which saw an increase of 1,000 more subscribers due to the project, drive interest to the website and social media. The project contributed to a 177% increase in website traffic (an average of 7,500 users per month) in the short time since going live, and an even greater increase in social media following and engagement. This helped broaden AF's exposure exponentially, and has also led to an increase in inquiries about membership.

Engagement with media practitioners and journalists was initiated, with a press conference and two small group roundtable conversations with media (including social media influencers) convened. The Board's communication committee helped to secure media contacts. This activity helped deepen understanding about how CSOs are perceived by the public; how to strengthen relationships with the media to amplify stories about the work of the sector; how to encourage more conversations about philanthropy, its role in development, and its environment; and how to position AF as a leader in the sector. Another roundtable was held with cutting-edge young philanthropic actors, on the state of giving in the Philippines and trust in the sector. Such conversations with a new generation of philanthropists are key, to consult them and gather support for communication and trust building. These will be further pursued in the future, to help shape an enabling environment for giving. The celebration of AF's 50th founding anniversary is also an opportunity to promote AF's role as a PSO, on social media and other digital platforms.

The media engagement is in its initial phase, and will take time. AF had limited expertise in this area before the project, and now aims to be seen as a credible source of information and a driver of conversations about philanthropy. Having a staff member dedicated to implementation of the communication plan was a key to success. Although AF cannot yet absorb this staff cost, the role will be continued by a member of the AF staff who gained experience participating in this project, as well as by the Board's committee. Another key success factor is that AF now has an inventoried collection of information to use as content for weekly dissemination. *"Our takeaways from the conversations with the media were simple but laden with realisations: treat the media as an ally, not a threat or an enemy, and win them over with a good story."*

5 Boosting gender-smart philanthropy and impact investing strategies to encourage a more enabling environment in Colombia

Innpactia

This project's goal was to contribute to the creation of gender-smart and gender-sensitive philanthropy and giving, to promote a more enabling environment that helps civil society to thrive in Latin America and the Caribbean. Specifically focusing on social impact investment, its objective was to achieve sustainable investment that meets the needs of women and girls, and maximises effectiveness.

Innpactia is a start-up transnational platform to connect high impact projects with funds and capacity building. For Innpactia, this project is a pioneering initiative, innovating and learning along the way. This eight-month project operated around Latin America in several parallel ways, to raise awareness about gender biases and gender equity, and to enable change in social investments, including by building partnerships, participation in regional events, engaging in dialogue with stakeholders, capacity building, research, media, and a digital platform.

Important opportunities were unlocked through initial participation in a Latin American impact investment summit — the GLI Forum — in Mexico). On the margins of the event, the project facilitated an interactive session and panel discussion with four experts from partner organisations, and over 10 impact investors. This helped to raise awareness about gender bias in investments, and to lead conversations with organisations working on gender bias in Latin America, and organisations related to investment. The sub-grant facilitated a video recording of the event and interviews with the experts, and data gathered from the dialogue was used to produce an infographic — both for further dissemination.

A collective interactive session during the co-financing vehicle of Innpactia 2022 presented another opportunity to dialogue, collect data, and identify gender biases to be tackled by philanthropists and investors. The event gathered around 20 participants, including funders, investors, Latin American leaders on social investment and gender experts. The project also took advantage of all other dialogues in which Innpactia participated, including more than eight meetings with alliances and partner experts, an academic forum, and meetings with grassroots organisations in Colombia and the broader region. The lessons learned from this grant were shared, and awareness was raised on best practices, creativity, and innovation in the investment ecosystem, focusing on a gender-smart approach to investment and its benefits, while encouraging dialogue and promoting the online platform and other media, tools, and activities of the project.

A key strategy was the development of partnerships. Innpactia networked with over 10 allies, and mapped new allies, in a dialogue to design a common methodology for gender awareness-raising. SUMA (a United States Agency for International Development partner) provided two gender workshops for Innpactia's team, driving strategy development, and exploring future collaboration.

An investigative report with research and academic data was produced, defining and providing analysis on gender biases in investment allocations of the past three years, highlighting barriers that women-led enterprises face. Around 2,800 civil society and social entrepreneurship impact projects were evaluated, serving as a baseline for evidence-based solutions and decision-making; a tool for awareness-raising; and a guide for gender equity in grantmaking, with practical strategies to integrate a gender lens.

A common methodology was designed to raise awareness about gender bias among philanthropists and impact investors. Two online masterclasses on gender-based factors across the investment process, each with a 45-minute video identifying gender biases and solutions to challenge them, were designed and produced for users of Innpactia's platform (including philanthropists, donors and investors). A video and infographic content were also produced, featuring testimonies, insight from the collective sessions, and strategic data on gender biases, in partnership with Spira and Pro Mujer.

A communication campaign and digital support were developed. The online platform was improved to host the pedagogical and audiovisual material; tools to design, formulate, deliver, and evaluate programmes with a gender lens; content on gender data, gaps and needs in practices; and a compilation of experiences and recommendations for gender-smart investing approaches. The general Innpactia platform increased its reach and is currently at more than 50,000 users (including CSOs and social entrepreneurs), in part thanks to the gender awareness-raising work. The gender landing page, which highlights the campaign, advocacy messages, and project-related classes, resources, and media, attracted nearly 500 visitors in total, while the online courses attracted more than 400 visitors, with 50 navigating the classes. This gender section of the website facilitates data collection on investors browsing the masterclass and gender content. The project's communication campaign, which aimed to raise awareness about the importance of mainstreaming gender equity, included two short videos for TV, regular social media activity, emails, and a blog. This project has contributed to 30% of the social investments uploaded on Innpactia's platform now having a gender focus.

Evaluation of the sub-granting and lessons learned

Feedback on the sub-grants and lessons that emerged were gathered in several ways. Grantees shared their experiences in two WINGS Enabling Environment Work Group feedback sessions. Feedback and lessons learned were collated from pre-assigned sections of the Final Narrative Report about the sub-grantees' projects. The topic of sub-granting was also included in the survey and individual interviews for the external evaluation of the EU project. A debrief and learning session on the Fund and how it was managed was held among WINGS' staff. The following points emerged as the most mentioned, with a high level of consensus in the responses.

Grantee feedback on local implementation, challenges and recommendations

Many of the PSO grantees are lean organisations with limited resources. The sub-grant was well appreciated and made a difference. **Future sub-granting is necessary and should be expanded.** *"Taking advantage of the resources we received was decisive as a departure point, to propel the execution of actions in this matter, that were long due."*

"As an organisation, we had always wished to expand our reach into the region and to assess the philanthropy operating environment, as we are aware of the shrinking civic space…" "Internally and externally, it has been a very important and necessary experience to add value to our customers and stakeholders. The amount of deliverables and activities we have been able to do with the grant has been productive and very useful as well."

It takes a lot of **time** to effectively advocate and raise awareness, to change the enabling environment. This is especially due to the time it takes to build relations and trust, particularly with the government, but also with other stakeholders; as well as staff turnover, which requires duplicate relationship-building efforts. This should be considered in the planning of projects. Nevertheless, most of the projects were able to accomplish a significant amount, given the **limited time** of these grants. The projects ranged from six to 12 months in length. The **success achieved in such a short time**, despite philanthropy often not being recognised as a development actor, might reflect the critical role of philanthropy, and its potential to harness the private and public sectors.

There is wide agreement that partnerships, networks, seeking allies, and a collaborative approach are crucial for success. The grantees were able to accomplish many activities by working with partners. Multi-stakeholder approaches are critical to address the Enabling Environment for philanthropy and should be given adequate time and attention.

Knowledge management is key. Collecting data, and gathering sufficient and inventoried information, documents, stories, tools, and guides, must be given time and expert support, to ensure advocacy success and the collection of sufficient content for awareness-raising, communication, and mutual learning. However, data collection has its challenges (including typical global issues of low response rates for social surveys, and the high cost of skilled researchers). Grantees recommended being creative in the collection methods, updating evidence, and disseminating it in various forms to ensure its use.

Capacity building is necessary and was heavily valued. In some cases, lack of the capacity, and/or differences among partners caused delays or barriers to the projects. There were some difficulties in finding adequate expertise in philanthropy to carry out the capacity building on planned topics. In the future, strategies, planning, and creativity should address and mitigate potential challenges and gaps.

There were some challenges around convening. In-person events were still limited due to the pandemic or limited resources, which made some activities more difficult. Both online and physically, it is always a challenge to negotiate calendars of diverse or multi-stakeholder partners. This factor reinforces the need for longer project timeframes, good planning, and mitigation plans.

Management of the sub-grants by WINGS

The grants were unanimously seen as extremely useful and needed, as noted above. The ability to direct the grants towards the members' local interests and needs was appreciated. Most felt that the sub-grant selection process was accessible, fair, and inclusive. *"The process undertaken by WINGS to support this initiative was extremely important and vital,"* said one respondent. Another said: *"The benefit of this grant was that it gave us ownership of the data, which was very important to me, and our working relationship with WINGS has always been perfect. It is a respectful relationship, and WINGS understands the nature of being locally driven. They worked with us and gave us the flexibility to design the project the way we felt it would be best suited."*

WINGS' support to the entire sub-granting process was appreciated by the grantees. Most were satisfied with the financial, administrative and technical support, as per their comments and survey responses. The granting process was deemed smooth and supportive. In particular, the relationship with WINGS throughout the process was appreciated, specifically the understanding, feedback, and clarifications, and, to some extent, the guides and instructions. When there was flexibility (e.g. extensions), this was very appreciated. One grantee respondent was thankful for *"WINGS staff being ready to offer clarifications and one-on-one meetings whenever requested"*. Another said: *"… before the grant was awarded, we received training on financial accounting and managing the grant, which was extremely beneficial. The information provided before the implementation of the project was excellent, and the team was there to support us every step of the way. We had a mid-year review, and the feedback we received was very friendly and helpful".*

However, there were many comments about the burdensome, complex, and time-consuming financial procedures and document requests. Stringent guidelines were given to minimise risks for WINGS and its sub-grantees. But WINGS staff agree that some requirements were not in line with the size of the grants, and that more should be done to align with the principle of 'having less restrictions to funding' that WINGS promotes globally. In particular, grantees and staff recommended more flexibility in budget line variations (especially on very small budget lines and adapting to procurement barriers and/or other resources acquired during the project), and adapting the financial documentation to the needs and practices of countries with low incomes and low banking access (such as cash and mobile phone transactions). More clarity should be given at the beginning about bank fees covered by the project and the exchange rate policy. Responses should be more timely. A consolidated resource pack is recommended.

The following three sizes of sub-grants were originally planned: micro (approximately EUR 5,000 to EUR 8,000 for specific actions/costs during three months), medium (approximately EUR 15,000), and grants prioritising multi-partner or regional initiatives (approximately EUR 30,000). There was no interest expressed in the call for proposals for micro-grants. Later, however, there was interest in direct funding support for the capacity or training of WINGS PSO members themselves. Some organisations saw the sub-grant funding as adequate for their capacity but, for many, the larger funding of EUR 30,000 was needed to reach results. More funding could have been beneficial. Financial requirements should be aligned with the grant size.

Since this was the first EU grant, and the first sub-granting experience for WINGS, it took time to select and onboard staff, build capacity in EU regulations, establish policies and procedures, and undergo legal review and approvals. At the same time, WINGS was undergoing staff and organisational changes, and setting up new internal systems. The participatory sub-grant selection procedure required additional time for set-up, formalising, and ensuring peer reviewers' timely participation. All these factors resulted in a long delay in getting the Fund initiated. As these foundations are now in place, they should no longer affect the future fund. There were also very long delays in the actual bank transfers — in part due to the same internal changes and to WINGS' accounting firm undergoing staff turnover. These delays unfortunately worsened the pressure of short project timelines, but were remedied with project extensions in many cases. The implementation timeline of the whole sub-granting process and of the projects must now be improved.

WINGS provided some capacity building for the grantees, with basic financial and project management training, and targeted bespoke capacity support scholarships. This was appreciated. One grantee mentioned that this was an *"amazing learning experience, how to manage a grant"*, and a few grantees highlighted the capacity building and knowledge development provided by WINGS in the feedback in their project report. However, a third of the respondents seem to want an increase or improvements in the technical support, training, and mentoring. Staff agree that the grant management and financial training was too short and general. This was partially addressed with the individual capacity building support towards the end of the projects. Some grantees recommend further training on data collection and research, on working directly with the EU (proposals, budgets, financial management and controls), and on the ecosystem and enabling environment. Additionally, more support should be provided regarding the content of the projects and their visibility.

Overall, the most appreciated aspect of the sub-granting support process, mentioned by nearly all respondents, was the peer knowledge sharing and learning sessions, in particular those organised with other WINGS members. Hearing from other grantees enables benchmarking and learning best practices.

Here are examples of what respondents said:

"It has been particularly helpful to also engage with other grant recipients in the meetings that WINGS has set up for this purpose". "It was priceless to keep connecting with other organisations". "We feel included in the collective processes". "We hope we can keep learning from others and improve".

It is recommended that this peer exchange be replicated and that it happens earlier in the timeline of the next fund. The availability of cases was also recommended, for which this report should provide a first response.

Next steps for WINGS sub-granting: The Lift Up Philanthropy Fund

WINGS formalised a partnership agreement with the EU, recognising the strategic role of philanthropy in development, and the catalytic role that WINGS plays to help philanthropy reach its potential.

A new EU grant has been approved, with the acronym Leap 4 Dev, and the title: **Leap 4 Dev**: **L**ift Up the **E**cosystem and **A**mplify **P**hilanthropy for **Dev**elopment: Elevating philanthropy as a key partner in localisation, development cooperation and the achievement of the 2030 Agenda. Its ultimate goal will be to leverage philanthropy's engagement, funding, influence, and added value, to implement the 2030 Agenda and become a relevant partner in development cooperation. To reach this, the objectives will be to: **(1)** develop philanthropy support ecosystems to create capacity and unlock domestic resources; **(2)** improve the Enabling Environment, to ensure favourable regulations to meet its potential; and **(3)** promote coordinated action among philanthropy and other stakeholders to avoid duplication, leverage contributions, and reduce the gaps for effective development cooperation.

This Lift-Up Philanthropy Fund will pursue the following outcomes:

1. Map and increase the capacity and actions of PSOs to initiate new collaborations, expand their current programmes and/or take on new roles to meet gaps in the sector and harness growing local resources towards development.
2. Increase the capacity for enabling environment advocacy and multi-stakeholder collaboration, resulting in increased indications of public commitments (advances towards policies, procedures, and regulations) for the improvement of the local conditions for philanthropy to exist, grow, and be effective.
3. Increase the investment and coordinated actions within philanthropy and with other sectors, to achieve the SDGs at the global, regional, and national levels (for example on climate change).

It is expected that approximately 34 sub-grants will be allocated, with approximately EUR 540,000 for the ecosystem development (a portion in direct grants for regional mapping and follow-up activities, and a portion for projects from calls for proposals); approximately EUR 400,000 for selected projects for local advocacy on the enabling environment; and approximately EUR 250,000 for grants selected from proposals that address philanthropy's advances and partnerships for the SDGs (such as climate initiatives).

As research shows, currently 80% of the investment in philanthropic support infrastructure is made only in North America and Europe. Globally, organisations lack the knowledge, financial, and human resources to be effective, carry out advocacy, and strengthen all types of philanthropy and giving. There is a unique opportunity to unlock philanthropy's potential, especially at the local, national, and regional level in low- and middle-income countries. This requires an influx of funding support.

With the EU's strong support, this new and expanded **Lift Up Philanthropy Fund**, with continued sub-granting available for WINGS members, responds to the continued needs and the prevalent lack of resources for philanthropy to be effective in low- and middle-income countries and areas that are at risk or under-resourced. The new fund will expand and build on the strong success of the grants of the **Enabling Environment Fund** described in this report, which served as a pilot for WINGS. The lessons learned and recommendations from this first sub-granting process will be invaluable. These are already being considered in the planning, to be incorporated into the upcoming **Lift Up Philanthropy Fund.**

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