Schuyt, T., Verkaik, D. & L.K. Hoolwerf, 2017 [forthcoming]. Better together? A Study on Philanthropy and Official Development Assistance. The Role of Private Foundations and the potential for collaboration. AFD publications, Paris.

This study was commissioned by Agence Française de Développement and conducted by the Center for Philanthropic Studies at VU Amsterdam, the Netherlands.

Please contact Theo Schuyt (<u>t.schuyt@vu.nl</u>) or Barry Hoolwerf (<u>l.k.hoolwerf@vu.nl</u>) to receive a copy of the full report.

Executive summary

This study investigates opportunities for collaboration between private philanthropic foundations supporting international development aid and official development aid (ODA) organizations. The study is commissioned by the French Development Agency (AFD) and conducted by the Center for Philanthropic Studies at Vrije Universiteit Amsterdam.

The study offers an extensive overview of the most important foundations that support development aid activities globally (to the extent these foundations were known; foundations not based in the US were oversampled). Positively, the response of this study exceeds the results of former recent studies. In sum, 55 large foundations were part of the sample and these foundations were traced and described. The study provides (best) estimations of the available budget for charitable support in 2015 for 46 foundations, and 28 foundations participated in the study by providing answers to an extensive questionnaire. Finally, five foundation representatives participated in an in-depth interview.

Profile of foundations supporting development assistance

The sample shows a large heterogeneity regarding annual available budgets. It is interesting to find that the majority of the foundations (55%) have a budget of less than 50 USD million, while also a large share of the foundations have budget available of more than 100 USD million (38%). As a consequence, fewer foundations fall in the mid-range category of 50-100 USD million.

Figure 1. Budget available for charitable support in 2015* (in % of foundations) (N=46)



* Budget available for charitable support in 2015 if available, otherwise most recent available year is used.

The average budget available by the foundations in the sample is 226,6 USD million, but much biased by the budget of the Bill and Melinda Gates Foundation (BMGF). If we take out their annual budget of 5.547 USD million, the average drops to 107,4 USD million. Their unique position is also made clear if we take a closer look at the budget available of foundations from different regions. North-American foundations (16) are the largest, with an average amount of 523,4 USD million, which drops to 193,5 USD million without the BMGF. The five (very) large Asian based foundations have an available budget of 136,17 USD million and European (20) foundations have on average 51,9 USD million available for charitable support. Their role is also shown in the flow charts in figure 2 and 3, where we see a major shift in financial flows if we leave out BMGF.

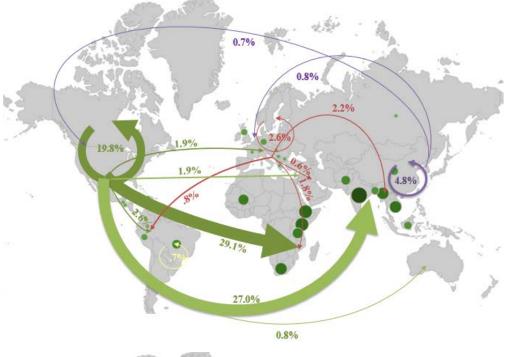


Figure 2. Regional flow chart charitable support from foundations* 2015**, in percentages*** of total financial flows (N=44)

Total budget for charitable support in 2015**:

10,2 USD billion

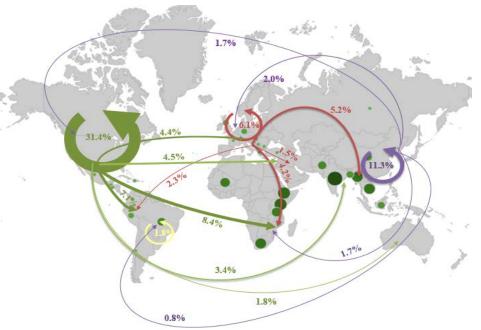


Figure 3. Regional flow chart charitable support from foundations* in 2015**, in percentages*** of total financial flows, excluding BMGF (N=43).

Total charitable budget for support in 2015**:

4,7 USD billion

- * Includes foundations with at least 1 USD million in charitable support.
- ** Figures refer to 2015 were possible, most recent year has been included if 2015 was not available.
- *** Only financial flows accounting for at least 0,5% of total financial flows have been included.



Circle size indicating frequency country is mentioned by surveyed foundations as focus country

Global figures on the total number of foundations, assets, (distribution of) budgets and allocation ot international assistance are not available or vary greatly between reports do to usage of different definitions of what is considered to be a foundation. Howe

Foundations can differ in their founder, funding, age, goals, target groups, operating style and region of activity. In this study, four types emerge and each type shares common characteristics.

Traditional Foundations

This type of foundations were created by an endowment, mostly received in the beginning of the 20th century and by (owners of) corporations. The origin of business of their founders allows them to support all kinds of charitable goals, and operate both national and abroad. These foundations do not solely support international aid related goals. In terms of operating strategy, most of these foundations function as gift-giver. Traditional foundations follow standard grantmaking procedures and particularly NGOs working in development aid apply for grants. Traditional foundations supporting development aid seem to work with NGO's, governments, official agencies and non-profits in the recipient countries. They mainly offer grants, entrance to their networks and their focus lies at the most vulnerable groups like women, youngsters and subsistence farmers. Most traditional foundations are found in North America and Europe. Finally, their budgets are substantial, reaching almost 150 million USD per annum on average.

Entrepreneurial Foundations

These foundations are a relatively new phenomenon. The origin of the business and ongoing involvement of their founders makes these foundations focused and strategic actors in development assistance. These foundations usually express particular values like "do it yourself"; according to this principle they favor matching agreements to stress the own responsibility of the target-groups abroad. Entrepreneurial foundations favor tight planning, financial control, and evaluation and impact measurement are regarded as important. Expertise is highly valued. Their founders are individuals that were successful in business, but their foundations are not (specifically) linked to the business they owe their fortunes to. Entrepreneurial foundations contribute by grants and a variety of instruments (expertise, program related investments, evaluations) and excel in matching grants. Next to charities, they support social enterprise, but also governments and non-profits. Also entrepreneurial foundations have substantial budgets available for support, with an average of 143 million USD per annum for the entrepreneurial foundations in the sample¹. Regarding location, this type of foundation entrepreneurial foundations are more common in North America and Asia, followed by Europe.

Corporate Foundations

The creation of most corporate foundations took place at the end of the 20th century and the beginning of the 21st century and were founded by (international) corporations. Corporate foundations behave similar to the entrepreneurial type, but differs from them in one respect: the goals are 'business linked'. They are used to take the lead, to set the agenda for new issues: e.g. climate change, ecological issues and environment protection. On the other side, corporations may use their foundation as CSR instrument. Corporate foundations may offer grants, but no entrance to networks and support non-profits and operating charities that have a close link to their business. Corporate foundations seem to

¹ Please note that the Bill and Melinda Gates Foundation has been excluded in calculating this average.

have relatively lower budgets available for charitable support, which was on 41,5 million USD per annum for the foundations included in the sample. Corporate foundations are mainly set up by European companies.

Ideological foundations

This type covers the religious, social movement, political and commercial intentions of the founders. Common among these foundation is that development assistance is used as an instrument for these intentions. However, it should also be noted that, although be classified as ideological foundation, the relative importance of underlying motives compared to development assistance objectives differs from ideological foundation to another. Generally speaking ideological foundations are regularly less transparent regarding publicing their annual (financial) reports. Although the number of ideological foundations included in this study is limited, it seems that their budgets are substantial (above 100 million USD per annum). A large share of the ideological foundations in this study have their roots within Europe.

Role of foundations in development assistance

As most European and North-American foundations participated in the survey (N=28), the results are particularly applicable to these foundations and possibly less for foundations based in Asia, MENA and Sub-Saharan Africa. The latter are less inclined to report their results and collaborate in studies in general, in which this study is no exception.

Foundations have a preference for impoverished women and youngsters, through education and health related programs, mostly directly by making grants to non-profits in the region, preferably with other funders. Typical support is by supporting projects or in long-term programs with a local partner, much less to individuals or overall organization support. The majority of support is given for 2-6 years. Foundations actively search for partners in the regions, and are less open to unsolicited approaches, and this especially accounts for non-corporate foundations. Regarding their role in development assistance, foundations prefer to have a complementary or collaborative role. Few identify themselves as bridge builder.

Motives of foundations in development assistance

Motives to create a foundation and that drives the organization are related to a perceived social responsibility and a principle of care. Taxation, political, influencing (policy), and dynastic motives are not reported to exert an influence on foundations. Personal experience (of the founders) with the issue is sometimes mentioned as driving motive by foundations, but not always and this does not vary much between different type of foundations. On the other hand, wealth sharing, reputational effects and social norms vary in their degree to which to influence the behavior of the foundation (founders), with wealth sharing playing a more important role for endowed (entrepreneurial, traditional and ideological) foundations, while reputational effects and social norms are a considered to be more important for (the founders of) corporate foundations. While founders had their motives to start a foundation, in daily practice the role of the original founders is reported to be of less influential than the board and staff the foundation.

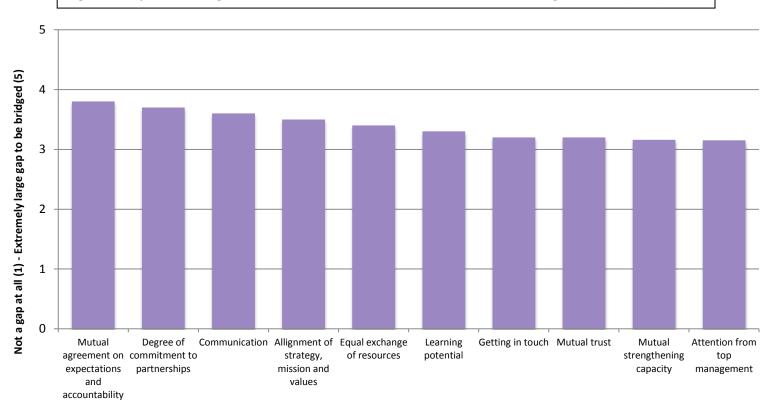
Experiences with and possibilities for collaboration

Most foundations haves experience with collaborating with ODA organizations, which was a positive experience for most of them. Negative experiences with collaboration are not frequent, and the more collaboration takes place, the more positive foundations are likely to be. The foundations with a positive

experience from collaboration have experienced the added value of official development agencies in increasing financial sustainability, providing access to networks, improving their effectiveness and improving their legitimacy. Foundations with negative experiences really only see the increased funding as a benefit, which is why the collaboration might not have been successful in the first place. Foundations that see themselves as having a complementary role see more additional value to collaboration than foundations that see themselves als innovators and/or experts.

Compared to collaboration experiences in the past, more foundations expect to collaborate with ODA organizations in the medium-long term. Foundations have little more positive expectations from collaboration than negative expectations. Barriers that should be taken into account are increased bureaucracy and the fear of loss of flexibility. Decreased focus on the goals of the foundations themselves and a possible conflict of organizational culture is considered less to be of a barrier in collaborating with ODA organizations. However, it seems that a lot of works still needs to be done in order to start collaboration. Regarding benefits, focus should lie on the improved scalability of projects. Improved legitimacy and a seat at the policy table is of lesser concern for foundations. Interestingly, perceived benefits seem to increase with foundations that have more experience with collaboration, while barriers seem to decrease. Concerning types of foundations, foundations that consider themselves as initiating and or experts perceive less benefits and higher barriers for collaboration. From literature, we find this self-perceived role as particularly found among the entrepreneurial type of foundations.

Figure 5. Gaps to be bridged for collaboration between foundations and ODA organizations (N=28)



Recommendations and directions for the future

Recently, governments have sought more intense cooperation with philanthropy. Apart from thise political shift, philanthropy itself re-emerged autonomously at the end of the twentieth century. Driven by an accumulation of economic wealth and prosperity, demographic changes and a growing consciousness of "Do it Yourself", recent decades gave way to a revival of philanthropic initiatives. 'Modern philanthropy' emerged, encompassing a broad spectrum of public causes, including research, employment programs, social ventures, social investments, social innovation, nature preservation, cultural heritage and development aid.

However, public policy and philanthropy represent two different worlds with regard to constituency, legitimacy, values and structure. Problems may occur if these worlds meet each other. Indeed, some governments have a rather critical stance towards private philanthropy. Mostly under the suspicion of "the rich want to have tax deductions" or the threat of uncontrolled financial transfers. On the other hand, governments can also take an opposite position by considering philanthropy to be an additional income source for their public policies.

Philanthropy is pioneering

Foundation researcher Prewitt (1999) takes a positive starting point. According to him, philanthropy enhances pluralism in society. "Philanthropy is distinct from politics, not because it rejects politics but because, for the philanthropy sector, the political route is not the only way to achieve goals for the common good in a democratic fashion". Payton and his colleague Moody emphasize the role of the pioneer and the role of the citizen in philanthropy, which is clearly of great importance in democracies: "We have argued that philanthropy plays an essential role in defining, advocating and achieving the public good. Philanthropic actions are a key part of the ongoing public deliberation about what the public good is and how best to pursue it. Both government and philanthropy provide public goods. Sometimes they do so in partnership – government money is a primary source of funding for non-profit organisations – and other times philanthropy steps in to provide public goods when both the market and government fail to do so". They add: "Democracy needs philanthropy because democracy is not simply a political phenomenon (Payton and Moody, 2008)."

Nevertheless, philanthropy has to legitimise itself. Philanthropy is entitled to serve a public purpose, which calls for public accountability. However, even more important, 'private philanthropy' is not truly private. Philanthropic institutions make use of tax facilities, supported by governments, that favor 'pluralism' in society. From this perspective philanthropy always has a double face: a private and a public one. That public side urges for public accountability as well.

To get to know each other, meet and, where appropriate, collaborate

This study offers insights in the world of foundations supporting development aid. The information gathered facilitates steps to be taken in closing the gaps between ODA organizations and foundations. Different foundations can be distinguished in the domain of development assistance, each with their own distinctive role. Together with ODA organizations they can make a difference in increasing the potential for their work. They can create synergy by collaboration, which should be interpreted in the broadest sense, varying from information sharing, networking, co-funding and partnerships. Mutual advantages can be derived from pooling expertise, sharing infrastructure, expanding activities, pooling money for lack of necessary funds, avoiding duplication of efforts and creating economies of scale.

Based on this study there is an indication for the need of improved dialogue, information exchange, networking and cooperation between foundations and ODA organizations. The needs, opportunities,

mutual benefits and barriers for collaboration should be further explored, including the mutual responsibilities when cooperating. The creation of forums or networks of DA foundations and ODA, regular meetings between both could bring these groups together.

Because of their independency - regulated by law - foundations possess specific 'assets', which make them potential 'change agents', 'free money to spend', able to react flexible and immediate to issues or problems and free to experiment. Governments, for their part, possess different characteristics: planned budgets, fixed procedures and political accountability (tabel 1).

Table 1. Characteristics of public (ODA) organizations versus foundations

	Public (ODA)organizations	Foundations
Goal	Public Good	Public Good
Legitimacy	Political control	Control by direct democracy and
		by law
Grants	Universalistic: without discretion	Selective; with discretion power;
	power	arbitrariness
Project characteristics	Political achievable and	Room for experiments
	accountable	and risk- taking
Funding	By planned budgets	Free, flexible money
Timeframe	Political cycli (4-6 year)	Long term opportunities

If ODA organizations and foundations indeed wish to interact, how to overcome possible barriers? The organisational sociologist Litwak (1985) addressed this question, which he formulated as: What can be done if organisations have seemingly incompatible structures, even though they have complementary aims. His answer is the matching principle: "organisations can optimally manage those tasks, which match them in structure". So, according to Litwak: for certain types of tasks you need ODA organizations that have the appropriate structure. For other specific tasks foundations have a better fit. To collaborate, an organizational fit is more likely with foundations that share cultural elements resembling that resembles each other, not only in terms of operating and grantmaking strategies, but also in terms of shared values and ideology.

Gentleman's agreement

As said, governments and philanthropy do not match naturally. To diminish these barriers, a gentleman's agreement may offer another promising solution. Such an agreement may be equated with a public contract. Both parties promise to be open towards each other in the pursuit of public goals and to accept each other's independence on the basis of mutual respect and honesty.

Contractual agreements – besides delivering benefits for both parties – help to avoid over-regulation and state bureaucracy. Contracts bring new dynamics to relationships and open doors to fresh ideas and innovation. Additionally, a contract is flexible, it is valid for a specific period, it evokes extra attention and energy, and above all, it offers legitimacy to the parties involved. Transparency and accountability are key elements in public contracts.

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