

PHILANTHROPY TOPICS

# COLLABORATIVE PHILANTHROPY

Summary in English



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# COLLABORATIVE PHILANTHROPY

RESEARCH AND WRITING

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# PRESENTATION

**T**he ongoing work to build a field of philanthropy and reinforced social investment, which aims to enhance collective and individual action—structured, permanent, results-oriented and designed to produce positive and transformative impact—within our society, is an essential part of GIFE’s DNA.

Over the past 25 years—celebrated by GIFE in 2020—we have advanced as a sector in that direction. The ecosystem of philanthropy and private social investment in Brazil has evolved, expanded, and developed. We have advanced in the creation and adoption of practices and capabilities. The field has expanded and diversified, incorporating a greater number of new players with a variety of profiles.

These achievements reinforce the purpose and importance of thinking about new layers and stages of construction for social action—in the sector and in society at large—that are increasingly more attuned to the transformations, demands and new challenges that have arisen globally and locally over the past decades.

There are opportunities and room for us to cross new borders regarding collective and collaborative action. Whether in the sense of articulation, when there are several players dedicated to the same causes and/or territories or to similar or complementary agendas, or in the search for engagement of new players—considering that there is still a great deal of potential to increase grants both in volume and number of donors, making the field ever more diverse. Regarding articulation, the development of collaboration through new collective formats of action allows us to increase efficiency, for instance, to create synergy, maximize results and leverage the efficient use of resources. As for new players, creating collective arrangements for mobilizing and managing financial resources makes it possible to combine the engagement of large, medium and small donors, bringing resources and efforts together for causes or territories.



Thus, collaborative action can be applied in the search for greater liaison and efficiency among all parties that are already working in the sector, or as an instrument to develop new architectures that enable more new players to mobilize or add resources for action.

In recent years, we have seen more intensive growth throughout these new architectures - with the creation of funds, networks, alliances, coalitions, philanthropic resource management organizations and a variety of other joint philanthropic grants formats - which enable and contribute to the development of collective and collaborative action modes in the sector.

The Collaborative Philanthropy publication seeks to engage this movement and journey, not only presenting an overview of the processes, formats and modes of action, but also seeking to illustrate ways for qualified enhanced collaboration in the field of philanthropy and social investment. That is the idea of collaborative philanthropy that we want to convey.

In the search for more articulated and collaborative forms of mobilization, management, and resource allocation, we are faced with a host of possibilities and concepts that intersect and complement one another. These possibilities invite us to take a broad look at philanthropy and collaboration, from experiences and cases of those who are experimenting new forms of action.

The idea of thinking about the ecosystem and promoting systemic action - producing collective and shared practices, not only among philanthropic actors, but also with the private sector, the civil society, the government, the academia and international cooperation - is at the forefront genesis of what GIFE is and the vision we have had for the field ever since.

It is now up to us to create and recreate, invent and reinvent paths and ways of evolving on this trail in line with the present reality and guided by the challenges of the 21st century.

We hope that this publication can contribute and inspire for such an endeavor!



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**WHY TALK ABOUT  
COLLABORATIVE  
PHILANTHROPY?**





# INITIAL THOUGHTS



For many years, there has been a reflection taking place within the scope of philanthropy and private social investment (PSI)<sup>1</sup> in Brazil regarding how to be more efficient in the applying resources, achieving greater scale and acting in a more complementary and coordinated way, be it among philanthropy actors or with other partners and sectors.

At the same time, we have reached a point in philanthropy development and maturity in the country that enables us to think of more collective and sophisticated mechanisms for social investment.

Internationally, this debate is also at the forefront and one of the issues that arises as a priority is collaboration between players and sectors. The Sustainable Development Goals (SDGs) agenda reflects this element in the utmost goal—related to all the others—as stated in goal 17, where one of the targets is:

SDG 17 Partnerships and means of implementation. Strengthen the means of implementation and revitalize the global partnership for sustainable development.

Target 17.17 Encourage and promote effective public, public-private and civil society partnerships, building on the experience and resourcing strategies of partnerships, data, monitoring and accountability (UNITED NATIONS, 2020).

Although the thought of collaboration has been present in the sector for decades, it has become increasingly intense, highlighting the will and need to reach new levels of integration of this component in the action of strategic philanthropy. In an increasingly complex world, where new challenges are added to secular challenges, and local crises and problems are added on to regional or global crises and problems, collaboration as an option for action is becoming a new paradigm in the philanthropic community, a condition for facing highly complex issues -

<sup>1</sup> Philanthropy, strategic philanthropy and PSI: these three terms are used interchangeably in this publication because choosing but one of them causes some of the stakeholders here to feel excluded. However, the word “philanthropy” was chosen for the title of the publication since it offers a broader meaning and brings up fewer questions to clarify it, including at the international level. In English, for example, the word “philanthropy”, as “private social investment” (PSI), is often confused with the concept of “impact investment”, as the word “investment” is frequently associated with financial return for the investor. In Brazil, as well as in a number of Latin American countries, the term PSI does not imply financial return on the investment and is often connected to a more strategic role of philanthropy. Strategic philanthropy is also understood as a way to add the second word in order to reinforce the concept of planned philanthropy, with a long-term view, thus being applicable as a synonym, as the search for an increasingly strategic impact as a perennial premise of sector performance in the sense of producing more positive impact and transformation, and a key part of GIFE’s mission is to contribute to that.



philanthropy and PSI agendas - that demand a greater amount of attention, focus and resources of all kinds.

When thinking about collaboration in the philanthropy ecosystem, in discussions with the context and with opportunities and obstacles that need to be taken advantage of and overcome as a sector, a number of questions arise.

- How can donors/philanthropic organizations/ grantmakers join forces in more sophisticated ways?
- How is it possible, from the creation of collective mechanisms, to create opportunities or open doors so that other new players that lack size, resources, scale, or ability to create organizations, can contribute resources?
- How can the sum of new resources and players facilitate a dialog with a wider range of topics on the public agenda, and more sustainable, efficient, and impactful initiatives?
- What challenges are there to the creation and implementation of initiatives like these, and how can they be overcome?

The book *Collaborative Philanthropy*<sup>2</sup>, the basis for preparing this summary document, seeks to investigate and illustrate ways and possibilities for answering these questions, contributing to the work of foundations, institutions, companies, and other donors/social investors in collaborating at some level, coordinating efforts and resources in common agendas. The search for solutions in this direction has been part of the strategic reflections in the field of philanthropy, and experiences that discuss these ideas are increasingly frequent.

Although collaboration has its limitations and obstacles, and may generate externalities that are not always positive, depending on how it is put into practice, it has been a key looming element on the path towards increasingly strategic philanthropy and social investment.

However, though there is a general perception that it is necessary to work more cooperatively, the idea is more ingrained in discourse than it is in practice. On

**We have reached a point in philanthropy development and maturity that enables us to think of more collective and sophisticated mechanisms for social investment.**

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<sup>2</sup> Available in Portuguese: <https://sinapse.gife.org.br/download/filantropia-colaborativa>

**Though there is a general perception that it is necessary to work more cooperatively, the idea is more ingrained in discourse than it is in practice.**

a practical level, there are many challenges, making it difficult to move the initiatives forward. One of the reasons for that is the lack of structured, systemic concepts, tools and formats that guide and inspire industry players to justify and practice collaboration.

Thinking about that and understanding the development of practical collaboration formats as one of the obstacles of the ecosystem, GIFE decided to dedicate the third issue of the *Philanthropy Topics* collection to collaboration and, more specifically, to a group of specific collaboration architectures, which include collaborative modes of mobilization, coordination, management, and distribution of resources, referred to here as collaborative philanthropy.

This summary in English aims to make the main ideas analyzed and developed by the publication *Collaborative Philanthropy* more accessible to donors and philanthropists, practitioners and researchers in the field of philanthropy and the action of global organized civil society.

## OBJECTIVES OF THE PUBLICATION

In addition to forming and developing the concept of collaborative philanthropy, to understanding the reasons and methods of doing things this way, the various expressions and understandings of collaboration in philanthropy, the reasons why it is necessary to follow this path and the formats for putting it into practice are systematized. The goal is also to understand the limitations and points of attention in the application of collaboration and collective formats of mobilization, management and distribution of private resources to produce public welfare.

Thus, the main objectives of the publication are to:

- develop and disseminate the concept of collaborative philanthropy in the field of philanthropy and social investment in Brazil;
- promote the expansion of resources and supported causes based on the possibility of diversifying the profile of players involved in the mobilization of financial resources and of funding formats and structures for grantmaking, with the support and backing of civil society organizations (CSOs).

It also proposes to:

- understand and organize forms of collaboration in the field of social investment and position the concept of collaborative

- philanthropy within that universe;
- identify and relate reflections and concepts nationally and internationally connected to collaborative philanthropy;
  - systematize reflections and present methods, formats and cases that help investors to be more collaborative in practice;
  - point out motivations and potential for collaborative philanthropy, as well as risks, limitations, and points of attention.

**Group of specific collaboration architectures, which include collaborative modes of mobilization, coordination, management, and distribution of resources, referred to here as collaborative philanthropy.**

## METHODOLOGY NOTES

The two main forms of research that served as the foundation for preparing the content of the publications were the following:

- Mapping, reading and analyzing guides, articles, interviews, materials, research, and other publications on the topics addressed by this book. All these documents are available on Sinapse, GIFE's virtual library ([sinapse.gife.org.br/download/filantropia-colaborativa](http://sinapse.gife.org.br/download/filantropia-colaborativa)).
- Structured interviews with players of different profiles, who are active in the field of philanthropy and PSI, and several informal conversations on the subject, which have also become significant sources for the elaboration of concepts, systematizations and collaboration formats presented here. Combining the two groups, there were over 25 interviews and conversations with:
  - Leaders and managers of organizations that integrate collaboration in a wide variety of ways;
  - people who are dedicated to thinking about the development of the philanthropic field and PSI from very different national and international perspectives;
  - fund managers;
  - creators of collaborative philanthropy initiatives;
  - civil society organization managers involved with collaborative philanthropy initiatives;
  - consultants with extensive experience in the sector, and other profiles.



# PART I



**COLLABORATION  
AND THE CONCEPT  
OF COLLABORATIVE  
PHILANTHROPY**





The background is a solid orange color. On the left side, there are two thick white diagonal lines that intersect with two thick white horizontal lines. The horizontal lines are positioned below the diagonal lines. In the bottom right corner, there is a small white rectangular shape.

CHAPTER 1

Reasons for  
collaborating  
in philanthropy

**H**ow to start talking about collaboration without falling into a major *cliché*? Who would say, in the abstract, that collaboration is not a good thing? A thesaurus search for the antonym of “collaboration” brings up “indifference.” Or even lack of support and apathy (7GRAUS, 2020)<sup>3</sup>. It is inevitable to think about this when you start addressing the reasons for collaborating. Thus, it is a matter of deconstructing the *cliché* and going beyond.

Collaboration is an obvious, dead-end, necessary consensus. But it brings along a world of challenges. The challenge of coming together with others. It might seem much easier—and perhaps it is—to work alone, both personally and institutionally. However, working collectively requires tackling issues and challenges that arise, and coming together with others is inevitable. Collectively, the way relationships between the different parties are established is crucial to understanding what is going on and to building the desired future. And in the area of philanthropy and private social investment (PSI), there is no way around delving into the public, collective sphere of shared challenges.

## 1.1 SYSTEMIC CHANGES AND PHILANTHROPY

“SDG 0 is said to be a potential mind shift”.

Testimonial

“I am, because we are” according to the Zulu word “ubuntu” (and in other South African languages). Or, “I only exist because we exist,” in another free translation of the same word. That cultural concept, expressed by just one word, indicates understanding, assimilation and acceptance of some cultures regarding the impossibility of dissociating different parts of a community.

To understand the role and importance of collaboration and cooperation in the contemporary world, not only in philanthropy, but extended to society as a whole in the construction of solutions to complex problems, it is important to turn to concepts such as vision and systemic change, complex systems and paradigm shifts.

Taken from scientific theories, those concepts help understand the dynamics and structure of today’s society, its relationship with the

<sup>3</sup> The best definition of collaboration as used in this publication is the first: 1 Act or effect of collaborating, of working together; cooperation, help (MICHAELIS, 2020).



planet as a whole, and it also contributes to the development of tools and mindsets that are decisive in producing the changes we want to make.

Systemic thought emerged from the development of understanding that, in a complex system, unlike a non-complex system (for example, a machine or a fully controlled experiment), understanding the relationships between the parts is more important than the characteristics of each one. Only then is it possible to describe how the system works, to make predictions about what might happen within and to test hypotheses on how to modify it.

One of the characteristics of a complex system is that the more numerous the connection points of a part (or the number of relationships it has), the greater the power of influence this element has on the system as a whole. Thus, identifying these key elements in the system is also essential to clear understand or focus on it.

In recent decades, systemic thinking—initially conceived in biology, studied in physics and gained mathematical models to finally expand into other scientific disciplines—has been increasingly incorporated into the studies of human and social sciences. Today, most of the problems of our time, guidelines focused on by philanthropy, can be described as complex social or environmental systems—from a country’s education system to the functioning of the system that explains climate change, including the dynamics of the economy or the mechanisms of inequality.

It is no coincidence that some of the greatest collaborative initiatives currently in the field of philanthropy, which also use models of collaborative philanthropy, adopt the systemic approach to support their creation, development, and implementation.

The idea of a paradigm also comes from natural sciences and has been exported to the social sciences. When applied to human systems, according to Capra and Luisi, a social paradigm can be defined as “a constellation of concepts, values, perceptions, and practices shared by a community, which forms a particular vision of reality that is the basis of the way the community organizes itself” (1997, p. 26).

Both concepts are related to the idea of collaboration—teamwork, cooperation—because that systemic vision, which represents a new paradigm, is “a change from seeing the world as a machine to understanding it as a network” (CAPRA and LUISI, 2014, pg. 26).

Today, most of the problems of our time, guidelines focused on by philanthropy, can be characterized as complex social or environmental systems.

The paradigm shift that the systemic view represents—a new view on life and the planet that also affects the way we relate to them—is

happening now, and we are all a part of it. It is a process. And it is very difficult to understand something in its entirety when you are so deeply involved in it. We are all, in some way, also agents of this change, able to influence it and to be increasingly aware of it, as it progresses.

When we think about the action of philanthropy, a way of expressing this awareness emerges in one of the existential questions of strategic philanthropy (it could be said, to a large extent, on a global scale): are we in fact producing transformations capable of impacting the bases of inequality, justice, poverty, the search for quality universal education, climate change, environmental destruction, or are we simply treating the symptoms and, therefore, eventually producing positive isolate results that have, nevertheless, little effect overall?

Every donor who engages in a cause has probably asked that question already. And it being done collectively, more and more, in roundtable discussions on impact, strategic philanthropy, innovation and risk, for instance, on collaboration or simply on how to evolve as a sector and increase the contribution in the search of solutions to challenges on the public agenda.

Attempts to incorporate the systemic view and to adopt practices and tools that enable this broader view of the contexts and agendas in which we intend to act are connected to this search for paths and the desire to produce changes that are transformative at another level of impact and scale.

## 1.2 THREE APPROACHES TO THE REASONS FOR COLLABORATING

In view of this more macro panorama that permeated the entire research process as a backdrop, this study identified three possible levels—called windows here—of answers to the question of why to collaborate in philanthropy.

### **Window 1: collaboration in search for a more just and sustainable world**

The first window discusses a more panoramic and strategic analysis, not only of the philanthropy sector, but of the shared challenges of society in the contemporary world—both locally and globally. That comprehensive look is important, as strategic philanthropy and PSI focus on fundamental action (perhaps with rare exceptions) to contribute to the search for solutions to these problems and challenges, in the construction of a more just and sustainable world.

- In most cases, philanthropy and PSI propose to work with and seek to contribute to the development of solutions to complex problems: collective challenges such as education, health, inequality, economic justice, climate change, and many others.
- Therefore, to produce more transformation, philanthropy and PSI must increasingly adopt systemic approaches.
- This requires specific methods and tools.
- Vision and systemic approaches are related to treading grounds that lead to greater collaboration.

### **Window 2: collaboration to face philanthropy challenges and strategic borders**

This second point of view is not trained at the state of the world, but at collaboration based on the realm of philanthropy and the challenges, limitations, and obstacles that the sector itself identifies in its performance.

- We operate in an increasingly challenging context.
- We need to assume a sense of shared responsibility.
- We need more resources.
- We can be more efficient.
- We want to increase the impact.
- We want to gain in scale.
- We want to engage macro indicators.

### **Window 3: lessons learned and gains from collaboration for the performance of philanthropic organizations**

Finally, there is a look at the more tactical arguments, which concern the gains from collaborating, added to individual organization actions throughout the collaboration processes in which they participate.

#### **For the organization itself:**

- it is a learning opportunity for the donors;
- it validates decision-making;
- it gives legitimacy to other parties involved in the agenda where it operates;
- it expands possibilities of resources in the organization for a given action;
- it increases the ability to take risks.

#### **For the field:**

- it helps to strengthen and develop the philanthropy ecosystem;

- it is a way to increase grantmaking efficiency for donors and grantees;
- it is a gateway for new donors to join strategic philanthropy initiatives;
- it avoids duplication of efforts;
- it increases the volume of resources for a given cause;
- it increases knowledge about the problem/challenge to be resolved, improving analysis through the sum of experiences of the parties involved.

**For the initiative:**

- it has the potential to increase impact and effectiveness, and to obtain better results;
- it increases scale and visibility;
- it leverages, optimizes and increases the efficiency of resource allocation.

Of course, the three windows have connections to one another. In an image metaphor, it is as if each window is in a different part of the house; the views are therefore different. However, parts of the landscape that can be seen from each room are common. Therefore, some aspects that explain reasons for the collaboration can be repeated with small nuances in the different points of view, as if they were transitions of landscapes from one window to another.

Although in most of the sources consulted, and in the conversations held, the reasons for collaborating were not specifically focused as justifications for collaborative philanthropy, in the broader concept of collaboration, the three levels can be applied almost entirely to the focus of this book.







CHAPTER 2

Organizing  
the look for  
collaboration  
in philanthropy

*“The initial challenge is to clear the land a bit. We are talking about many things at the same time. We need to organize this conversation”.*

Testimonial

The ways of establishing collaboration in the philanthropic universe are possibly endless because they are closely linked to our collective creative potential. Each collaboration is unique—it involves players who are unique, a specific agenda, a particular territory, at a unique moment in history. It can involve very different arrangements and very different degrees of intensity.

In this chapter, the proposal is to present an overview of how collaboration can take place in the ecosystem of strategic philanthropy and private social investment (PSI), so it is important to pay attention to the fundamental elements that help describe and, therefore, understand a particular collaborative initiative. Table 1 brings together these elements and questions that help to design and explain a collaborative initiative in philanthropy.



## **PARTNERSHIP VERSUS COLLABORATION**

The publication Collaborative Philanthropy uses the terms “partnership(s)” and “partner(s)” very sparingly and carefully. The understanding is that yes, of course, every collaboration is a partnership and, as a result, it involves partners. However, those terms are broader and involve many types of relationships. A partner can be another organization or individual that invests, donate or organize jointly, but it can also be a supported CSO or supplier that develops significant content or facilitates processes, or simply contributes at a specific point of project development, a department linked to some government focal point for a specific action. Finally, in the potential realm of partners, the sky is the limit. Here, attention is focused on collaborative forms involving the mobilization of private resources for the production of public goods, with delimitation of boundaries and differentiation of the collaborative movement and, more specifically, collaborative philanthropy from the broad range of partnership possibilities.



**TABLE 1 – KEY QUESTIONS TO UNDERSTAND COLLABORATIVE INITIATIVES  
IN PHILANTHROPY AND PSI**

ELEMENTS		KEY QUESTIONS	
Players involved	Who are the players?	Are they multisector players or just philanthropy and PSI players?	Can new players join the initiative? What are the rules?
Resources involved	What is the volume of resources?	Do all those involved contribute resources? Is the volume of resources contributing the same?	How does this affect governance, if at all?
Degree of institutionality	Is the initiative formalized? How?	Is there an organization running the initiative?	
Communication and engagement between players	What is the degree of engagement between the players who are jointly financing?	What is the degree of engagement between the players who are jointly financing, and the players involved in the implementation of the funded initiative?	What are the communication flows/ mechanisms between the players involved?
Common agenda	What is the agenda, cause, or challenge to be faced? What is the territory, public and other areas of activity?	What is the context?	What are the priorities? What is the action plan?
Supported initiative	Is the initiative being built jointly between the players involved?	Or is it an existing initiative from another organization?	Or does it even involve the creation of an organization?
Time/period of the collaboration	Is there a firm deadline? What is it?	Is it an initiative that aims to continue over time?	
Governance	Is there structured governance?	What is the governance format/structure? How do different players take part in it?	What are the flows and processes for decision-making?
Impact	What is the purpose of the collaboration? What is to be achieved/changed?	What are the indicators used? What are the goals?	How is follow-up, monitoring and evaluation done?

Source: created internally.

The characteristics and questions proposed in this table can act as a checklist when starting a collaborative initiative. In addition to helping clarify the action, answering them also contributes so that everyone involved is on the same page, more aligned, with clearer arrangements and with a more similar understanding of how the initiative will be carried out. Full clarity at the beginning does not exclude the need for a lot of communication, exchanges and potential rearrangements throughout the process: combinations and initial alignments are important allies to facilitate difficult conversations along the way.

**FIGURE 1 – COLLABORATION IN PHILANTHROPY AND PSI**



Note: the details of dimension 2 of this figure can be found in figure 3.

# Formats

- External actors invited for some management instance (advisory or deliberative council)
- External actors invited to hear about the project, program or initiative of the organization
- External actors invited to support the selection of initiatives that will receive a grant from the organization

- Working groups
- Networks
- Coalitions
- Alliances
- Other spaces for exchange knowledge, experience and promote networking

- Giving Circles
- Grant/Investment Coordination Spaces
- Networks, Coalitions and Alliances
- Joint grants in Projects, Programs or Organizations – new or existing
- Fund the funders
- Public-Private Partnerships
- Other Inter-sector Partnerships (between philanthropy and universities or international cooperation)
- Collective Impact

- Crowdfunding or Collective Financing
- Matching
- Philanthropic Resource Management Organizations

- Philanthropic Fund created and managed by one or more organizations
- Fund formally constituted as an organization

- Such as: Working groups, Networks, Coalitions, Alliances, Other spaces for exchange knowledge, experience and promote networking

- Organizations created for collaborative action focused on an agenda (often co-created by many organizations which can include philanthropic organization supporting the initiative with joint grants)

Table 1 is the starting point for understanding collaborative initiatives in philanthropy and the basis for building the organization proposed in this chapter. The purpose is to help grantmakers to place their collaborative initiatives, to conceive and develop them, contributing to facilitate and organize the conversation about collaboration in the field.

Figure 1 was organized to visualize and organize how collaboration can happen in practice, in the field of strategic philanthropy and PSI. It is a diagram created from two kind of sources: (1) the assumptions of this study were developed upon GIFE insights as well as the findings from interviews and conversations carried out during the research process and (2) a selection of other study classifications - primarily Rockefeller Philanthropy Advisors (n.d.), Stanford Social Innovation (KANIA and KRAMER, 2011) and a compilation made by The Bridgespan Group (POWELL, DITKOFF and HASSEY, 2018), available at *Sinapse* (GIFE's virtual library) [sinapse.gife.org.br/download/filantropia-colaborativa](http://sinapse.gife.org.br/download/filantropia-colaborativa).

In the proposed framework, collaboration is organized in three dimensions, related to intentionality, formats and ways of acting:

– dimension 1: collaboration in individual action

Collaborative actions focused on the individual actions of philanthropic organizations.

Philanthropic players incorporating elements of collaboration in the listening process for decision-making process in different spheres or participating in collaborative spaces that can enhance their actions.

– dimension 2: collaborative philanthropy

Spaces, models, formats, collaborative architectures among philanthropic organizations/grantmakers/donors/social investors that mobilize, manage and/or distribute resources.

Ways of conducting collaborative activities that add efforts and resources from philanthropy organizations and/or individuals and families an establish grant coordination or joint grant procedures.

– dimension 3: grants for collaboration

Financial support from philanthropy in collaborative initiatives.

Actions related to investment in collaboration, when, from the point of view of donors/philanthropic organizations, the key decision is to donate resources for something that is collaborative in its essence.

In addition to these dimensions, there are two other aspects added transversally:

– collaboration as a strategy for action

It is increasingly possible to hear that collaboration has become a strategic guideline for an institute or foundation. Some of them have already been created with this assumption and challenge: working collaboratively as something that is part of the organization's DNA. From there, goals are established and structures are created for these specific positions or areas and a process of continuous search and learning is started, because there is no formula in place for collaboration. There are several theories and tools to guide and support strategic planning. Now, to support strategic planning based on collaboration between the various players who engage in the problem, there are certainly fewer tools, even though there are more and more people thinking about it in organizations and in the academy.

– collaboration as a cause

There are organizations that put collaboration at the center of their actions, which have decided to invest in it as their cause and that seek to invest primarily in initiatives that will, somehow, promote collaboration between different players. In these less frequent cases, collaboration usually appears, to some extent, in the organization's mission.

**Another important point in the logic of the proposed division is to understand that it considers the point of view of the private social investor/donor. What determines where an initiative fits depends on the relationship that a specific philanthropic organization establishes with it.**

---

Based on Figure 1, almost all forms of collaboration can be seen in the philanthropy and PSI sectors. However, more than closed and isolated boxes, the same initiative can certainly have a little of each proposed dimension and two, three or more collaborative formats mapped in each of them at the same time. Many of them are a combination of the descriptions presented here. The suggested approach is highly matrixed: all dimensions can intertwine and the same initiative can contain the three proposed dimensions, in addition to the two transverse abovementioned aspects. In reality, rather than classifying, the purpose of Figure 1 is to organize the search for collaboration, differentiating the countless forms of collaboration and highlighting collaborative philanthropy initiatives, in an effort

to develop this concept as a specific form of collaboration in the field of philanthropy.

Another important point in the logic of the proposed division is to understand that it considers the point of view of the private social investor/donor. What determines where an initiative fits depends on the relationship that a specific philanthropic organization establishes with it.



### **COLLABORATION TO ENHANCE PSI AND PHILANTHROPIC ACTION**

These are initiatives that can have different collaboration formats and whose purpose is to develop the philanthropic and PSI ecosystem/sector itself. They can be associative organizations of field infrastructure, such as the ABCR - Associação Brasileira de Captadores de Recursos (Brazilian Association of Fundraising), Rede de Filantropia para a Justiça (Social Philanthropy Network for Social Justice), Wings - Worldwide Initiatives for Grantmaker Support, Aliança pelos Investimentos e Negócios de Impacto (Alliance for Impact Investments and Impact Business) and the GIFE. They can be non-formalized movements, such as Movimento por uma Cultura de Doação (Movement for a Culture of Giving). It can be a fund for field development, such as Fundo BIS. They can be networks or working groups focused on developing boundaries and/or challenges in the sector, such as knowledge, evaluation, Sustainable CSO and grantmaking by GIFE or groups akin to Wings. As in other collaborative initiatives, they may or may not have financial resources involved in different degrees of magnitude, they can be more or less institutionalized or have varying numbers of stakeholders, with varying degrees of engagement, more time-specific or long-term, etc.







## CHAPTER 3

# The status of philanthropic collaboration in Brazil

**W**hen analyzing the main research data on collaboration in the field of philanthropy, as well as interviewee perceptions of how collaborative the field is and how this collaboration occurs, it is possible to see that advances have been made. Still, many barriers and difficulties need to be overcome so that, as a field, we can change the level of relationship to engaging in collaborative practices. Finally, analyses of advances and difficulties of collaboration in philanthropy also reflect on the limitations of collaboration and the situations in which it can generate externalities that are not always positive.

### 3.1 THE GLASS HALF FULL

**“I think the sector is more mature for collective work. The 1990s were a bit like ‘let’s set up’, ‘let’s see what we need to develop’, ‘needs assessment, needs grantmaking’. The 2000s were more focused on the development of instruments and more profound knowledge to deal with causes, and to understand what public policies are there to work with. Many new people came in during this period and many organizations are still precarious in these issues, but looking at the 20 or 30 organizations leading the sector, which end up being the pioneers developing the field, they have advanced. Today, these large organizations have a much more in-depth understanding of the education agenda or the areas in which they operate—admirably more profound! The great evolution was the degree of understanding about the reality with which they deal”**

Testimonial

#### Granted: we have evolved as a sector.

- Just 8% of those responding to the latest edition of the GIFE Census (2019) do not participate in any type of network or group. In addition, half of the organizations claim to actively participate in more than one collaborative space on a regular basis.
- 71% of the 133 respondents participate in co-investment initiatives, whether or not they involve financial resources.
  - Most philanthropic organizations use more than three joint grants/ co-investment formats.
  - Formats related to networking and sharing methodologies and knowledge have a greater footprint than those involving the contribution of or receiving financial resources.

**“I have seen an evolution towards more associations, more networks, and more collaboration in various fields and also in philanthropy— of foundations, institutes and even companies— intent on reinforcing the impact”**

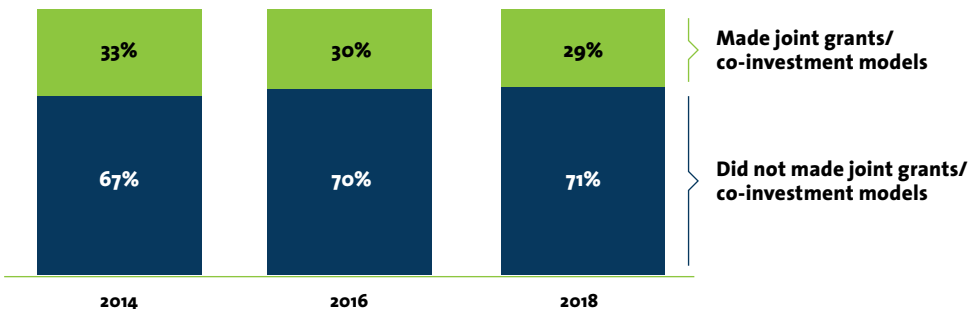
Testimonial

**TABLE 2 – PARTICIPATION OF PHILANTHROPIC ORGANIZATIONS IN NETWORKS OR GROUPS (2018)**

DOES THE RESPONDING ORGANIZATION INTEGRATE NETWORKS OR GROUPS?	%
Does it not integrate networks or groups?	8
It integrates one or more networks or groups, with sporadic participation.	35
It integrates one or more networks, participating regularly in projects/programs, working groups and so on.	50
It integrates one or more networks or groups, supporting dissemination/ communication.	23
It integrates one or more networks, playing roles in the governance structure (coordination, board, and so on).	36
It provides financial or material support to ensure the feasibility of projects/ programs in the network or group.	32
It provides financial or material support to ensure the institutional strength/ management of the network or group.	29
Others	1
Base: 133 Multiplicity Index: 2.2	

Source: GIFE (2019).

**FIGURE 2 – EVOLUTION IN ADOPTING JOINT GRANTS/ CO-INVESTMENT MODELS IN THE PSI (2018)**



Source: GIFE (2015, 2017, 2019).

Note: The colors of the bars represent the number of organizations that have conducted at least one action with joint grants/ co-investment compared to the number of organizations that have not conducted any action with joint grants/co-investment.

**TABLE 3 – MODES OF JOINT GRANTS/CO-INVESTMENT AMONG PHILANTHROPIC ORGANIZATIONS (2014, 2016, 2018)**

<b>MODES OF JOINT GRANTS/ CO-INVESTMENT MODELS</b>	<b>2018 (%)</b>	<b>2016 (%)</b>	<b>2014 (%)</b>
No joint grants/ co-investment made	<b>29</b>	<b>30</b>	<b>33</b>
Provided financial resources without specific criteria to define the value	<b>18</b>	<b>49</b>	<b>58</b>
Provided financial resources in matching strategies	<b>33</b>	N/A	N/A
Received financial resources	<b>22</b>	<b>28</b>	N/A
Provided or received human resources	<b>15</b>	<b>35</b>	<b>38</b>
Provided or received know-how/methodologies/ experience	<b>40</b>	<b>50</b>	<b>57</b>
Contributed or received equipment/technical resources/products	<b>11</b>	<b>16</b>	<b>23</b>
Contributed advocacy actions for the project/ program or for a common cause	<b>20</b>	<b>19</b>	N/A
Intermediated/facilitated access to communication resources to give the project/program visibility	<b>23</b>	<b>26</b>	N/A
Participated in a network of private social investors who have their own agenda of activities	<b>38</b>	N/A	N/A
Promoted networking or other articulation activities	<b>44</b>	N/A	N/A
Some other way	<b>2</b>	<b>3</b>	<b>4</b>
Base	<b>133</b>	<b>116</b>	<b>113</b>
Multiplicity Index	<b>3.7</b>	<b>3.2</b>	<b>2.7</b>

Source: GIFE (2019).

Note: N/A - not available, alternative not present in the survey.

### 3.2 THE GLASS HALF EMPTY

*“In a network environment, we have part of the group that is very engaged and very keen, while another part is just there to be in the photo. That is a huge challenge ”.*

Testimonial

*“Today we must be more collaborative, participative. It’s cool, modern, but we’re not necessarily doing it. We are incorporating discourse and some tools that are fashionable, but that is not necessarily leading to structural changes in organizations in terms of superstructure. It is changing a lot in the discourse, in the narrative, in some more specific efforts. We stand in the doorway of collaboration and, in general, organizations are OK with that, while others manage to do a deeper reading of having to go further ”.*

Testimonial

*“I think that the organizations are satisfied with just participating here or there and then, voilà, it’s settled! If you really want to change, you need to touch on issues such as governance and strategic planning as a model for action, such as the issue of areas and territories—and I don’t see much movement toward dealing with them more deeply. How am I going to collaborate if being part of collaborative environments requires me to be in territory Y or area Z? It is very difficult to collaborate in this context ”.*

Testimonial

*“There is a lot of rhetoric around it, and a series of other cross-incentives. Institutions often have a joint investment goal; there is a whole lot of rhetoric. But, deep down, there is a goal that you need to reach: you need to bring in money to fund what you are doing. So, this may not be the best way to build forms of partnership ”.*

Testimonial

Collaboration is more embedded in discourse than in practice.

Work methods and gaps that hinder collaboration:

- participation in collaborative initiatives because it is a trend, without implying a review of the organization’s modes of operation;
- one-off and shallow participation, with low participant engagement, which ends up hindering progress and generating conflicts with other participants;
- lack of focus and priority;

- unconnected analyses on the contribution and relevance of the change that is expected in a particular area;
- lack of flexibility;
- overly self-referenced focus of the collaboration, with motivation related to meeting internal goals;
- collaboration only as a way to attract more resources;
- low involvement and support from the governing bodies of collaborating organizations;
- little experience and few models of collaboration between philanthropy and public policies in which the main role is public management and existing policies.

### 3.3 RISKS AND LIMITATIONS

“*No authoritative statement, such as ‘You can’t do anything alone’ or ‘Nowadays you need to work with other investing partners,’ seems good to me. I don’t know. It depends on what the objective is. It is often true, but sometimes it is not*”

Testimonial

“*There may be an idea that everything we do needs to be in collaboration, but we need to talk about what goals there are when we establish some sort of collaboration. The very idea of collaboration is a good one. It is reasonable to think that, to deal with the common problems that most organizations face, we need to collaborate with others, even if that doesn’t necessarily take us anywhere*”

Testimonial

“*I think it is a challenge to think about what favors and what hinders collaboration. Collaborating takes work, it requires making contacts, and it takes a lot of listening; it requires understanding and getting to know each other to align goals. So, it needs to make a lot of sense, because it requires more time and effort, and it does not necessarily bring about better results*”

Testimonial

## Collaboration is not always the answer.

- It is important to analyze whether the main objective calls for collaboration or has characteristics that can generate a great deal of conflict, such as a short and flexible timeframe or a series of preset ideas that cannot be changed.
- Sometimes we must accept that collaboration is not possible, as when the other key players that would potentially be involved in the collaboration are unwilling to do so.
- If there are excessive institutional ties when it comes to collaboration, participation might be more of a distraction than a contribution.
- The organization and the people involved must be truly willing to deal with the time required for collaboration.
- Even in an ongoing collaborative initiative, each activity does not need to be collaboratively implemented.

## Some possible negative externalities must be observed.

- Concentration of resources (and, consequently, of power) in the hands of just a few decision-makers. To mitigate this risk, it is especially important that collaboration take place in parallel with more participatory methods, not only among those who are contributing resources, but also among other players, even the organizations receiving the resources.
- Negative effects for grantees, adding an extra layer to the relationship between grantees and funders or limiting the number of funding opportunities available.
- Funders aligned around unique strategies can move philanthropy away from other emerging ideas and practices, as they are centered on a single group thought.
- The role of local grant makers can be impaired, as they are often smaller.







CHAPTER 4



Collaboration  
challenges and  
success factors

**A** final important key in understanding the collaboration and being able to better develop collaborative initiatives in philanthropy is to observe the factors that hinder or hamper collaboration, as well as those that enhance it. While it is important to be aware of the challenges and difficulties of collaboration, it is essential to identify the elements that drive it. Philanthropic organizations can thus make a better assessment of which strategies to follow and how best to conduct and/or participate in collaborative initiatives to contribute to their success.

**“Organizations have different mandates, respond to different governance structures—from councils to support bases. It is indeed a challenge to align all of these things”.**

Testimonial

Collaborating can be difficult and expensive. That is true. There is no magical world of collaboration where everyone is cooperative and helps one another, where all interests at stake are common—though this image can be a valid utopia that helps and motivates to move in that direction!


### Common Challenges

- TIME. It takes longer, at least until it engages.
- ABILITY. Collaborating is not natural for some people.
- EGOS. These need to be removed.
- INSTITUTIONAL CULTURE. Identify and act when there are insurmountable incompatibilities.

It takes time and energy at the basis of whatever we do to move towards developing in terms of collaboration and practices and in terms of creating new collaborative philanthropy architectures. There is a whole list of success factors that can function as points of reflection and alignment. Some of them may be repeated mentally several times, for example, before starting a meeting with partners involved in the collaborative philanthropy initiative, or that involves collaboration to some extent, in which we are participating.

## Tips Based on Success Factors

- Build a common dream or vision on which to define a common agenda.
  - Be flexible regarding the diversity of priorities and the definition of common goals.
  - Ensure strategic alignment, involving all participants.
  - Consider that, if it is to be collaborative, it cannot be your way and it is not yours. Or it is only yours to the same extent that it belongs to the other stakeholders.
  - Understand that, in an actual collaborative initiative, every stakeholder would have it his/her own way if operating alone.
  - Set goals and determine how they will be monitored collectively.
  - Review the long-term concept: substantial transformations need time to take place.
  - Pay attention to innovation: be careful so that differences, flexibility, and concessions do not become limiting factors.
  - Invest in clear leadership and governance arrangements.
  - Make sure that someone wakes up every single day with his/her mind set on what must be done for the initiative to happen, or that there is an organization in place for that purpose.
  - Communicate: create tools and internal channels between participants and make clear agreements on the initiative's external communication.
  - Take care of social capital: stakeholder composition and diversity are aspects that can be strategic in the construction of a collaborative initiative.
  - Learn to trust and build trusting relationships.
  - Be open to coexist with those who think differently.
  - Consider and prioritize strategic collaborative initiatives for the organization.
  - Incorporate collaboration into planning and involve the organization's leadership.
-



With this analysis, we concluded all aspects related to collaboration in philanthropy that appeared throughout the research process involved in drafting the book. In the next chapter, we zoom in to take a closer look specifically at the idea of collaborative philanthropy and the group of formats and initiatives that fit in with it.

As already mentioned, all the ideas presented so far—even if looking broadly at collaborative action in the sector—can be mostly, if not fully, applied to undertaking collaborative philanthropy. Sharing all of this prior to delving into these specific formats of collaboration has served as warm-up, preparing us for them.





An abstract graphic consisting of several thick white lines. Two lines are vertical, and two are horizontal, creating a grid-like structure. The lines are slightly offset from each other, giving a sense of depth and movement. The background is a solid teal color.

CHAPTER 5

# Collaborative Philanthropy

A white brushstroke graphic located in the bottom right corner of the page. It is a thick, horizontal line that tapers slightly at the ends, resembling a paint stroke.

“We are seeing the appearance of initiatives whose approaches give visibility and legitimacy to the issue of collaboration. If giants of global philanthropy such as the Gates Foundation and the Rockefeller Foundation understand that they need to come together to act with more impact and scale, then that is an important message for the sector”.

Testimonial

“The development of collaborative practices has firms respond to the vision of a positive, [...] articulated, effective, transformative, systemic philanthropy. It moves firms to gain efficiency in an ecosystem that is established and matures, integrating processes and reducing costs. And it moves towards being able to bring in new layers of players who cannot participate without collaborative structures because they lack resources, will or vocation”.

Testimonial

Although the book addresses the idea of collaboration in the action of philanthropy and private social investment (PSI) in a broad manner, it is mainly about underlining the concept of collaborative philanthropy to stimulate the emergence and development of new initiatives and enhance and qualify existing initiatives, overcoming the challenges therein.

This is because there is a huge opportunity in the development of philanthropy and the PSI ecosystem. **Formats that make up the set of collaborative philanthropy initiatives have the potential to add many benefits to the ecosystem.**

- **An expanding volume of private resources to produce public good** provides new architectures for donors (people or organizations) with fewer resources and different degrees of philanthropy engagement to join new or existing initiatives.
- **Mobilizing new players/donors** through creative mechanisms that encourage giving in unlikely situations, such as rounding up supermarket bills, joint sales of magazines and medicine, or crowdfunding campaigns, with a great deal of autonomy for its creators and the possibility of decentralized and participatory dissemination.
- **Increased efficiency in resource management**, since costs involved can be shared among donors, rather than replicated, as is often the case with isolated initiatives.
- **Increased efficiency in the allocation and distribution of resources**, since shared management requires designing and prioritizing common strategies, optimizing resources, avoiding



duplication of actions and saving stakeholder time in development and implementation.

- **An expanding volume of resources for new agendas (contemporary collective challenges) or agendas that receive less attention and less philanthropic resources.** Collaborative philanthropy formats and architectures enable many people (with different donor potential) and organizations (including small and medium-size businesses) to come together around a common theme that has few large funders at hand and yet create support mechanisms that add significant resources from a large number of donors to contribute to the common cause, enabling new actions and increasing the contribution of philanthropy and the potential impact on the agenda.
- **Incorporating and improving grantmaking strategies, bringing more donors to philanthropy and PSI** (and fewer performers of their own projects), strengthening organized civil society, public policies or other important players and partners. This is because collaborative philanthropy architectures, in most cases, engage in third party support rather than create and perform their own projects. Chapter 5.3.2 details the interface between collaborative philanthropy and grantmaking.
- **Encouraging the development of more participatory forms of grantmaking**, contributing to the distribution of power and the mainstreaming of supported groups and/or communities as well as organized civil society in resource allocation decisions (chapter 5.3.3 elaborates on that approach). This is because the expansion of players involved in the initiatives and, therefore, in the decision-making spheres, stimulates and opens space for greater reflection also on aspects related to the choice of projects and organizations that receive funding.
- **Stimulating and creating new thematic, regional or community funds**, expanding the ecosystem.

**What is being called collaborative philanthropy** is the set of forms of collaboration with the participation of at least two players in philanthropy – givers or managers of philanthropy resources (Table 2 shows

**What is being called collaborative philanthropy is the set of forms of collaboration with the participation of at least two players in philanthropy, cooperating regarding the required philanthropy resources to operate in at least one of the following spheres: collaborating in the mobilization or collaborating in the coordination, allocation and/or management of donations or grants**

who the philanthropy players are). These players can be PSI organizations (institutes and/or foundations), companies, philanthropists (families or individuals), other philanthropists (such as family offices) and/or individual givers of different sizes and profiles. Collaborative philanthropy also involves cooperation regarding the required philanthropy resources to operate in at least one of the following spheres.

**1. Collaborating in the mobilization** of private financial resources to produce public good, the sources of which are diversified and, therefore, involve the participation of several givers or philanthropic resource managers, which qualifies the mobilization as collaborative. For example, a crowdfunding campaign for a project with a determined resource mobilization goal that includes resources from individuals—who can aggregate very different amounts of money—and/or from organizations—be them companies of different sizes, institutes or foundations, and others.

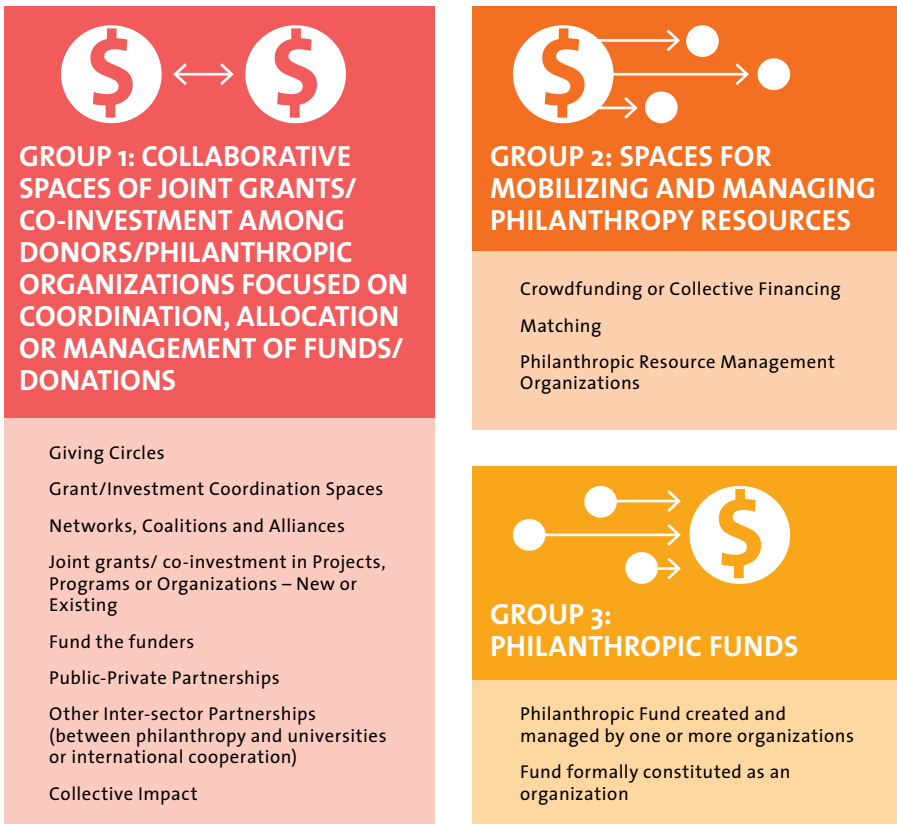
**2. Collaborating in the coordination, allocation and/or management** of private financial resources to produce public good, through processes and spaces for the exchange of information that enable philanthropic organizations to consider the performance of other funders, acting on the same agenda, to define its strategies and the allocation of its resources in a coordinated and complementary way. Allocation and management collaboration happens when decisions related to the distribution of resources and the design of the subsequent process—including a series of governance choices and combinations and action implementation (see Table 1 in Chapter 2)—are proportionally defined and conducted among donors. For example, an alliance of diverse philanthropic organizations/grantmakers/social investors/donors (two or more) who share the same cause and make a joint decision to manage part of the resources they intend to allocate to it, thus establishing a common focus. Such management may include creating resource allocation strategies and formats, as well as monitoring grants, outcomes and impacts.

A collaborative philanthropy initiative will be classified as such if it has at least one of these two spheres of collaboration present—and may, of course, contain both.

FIGURE 3 – DIMENSION 2: CONCEPT OF COLLABORATIVE PHILANTHROPY

# COLLABORATIVE PHILANTHROPY

is the set of forms of collaboration with the participation of **at least two players in philanthropy with involvement of financial resources** in at least one of the following spheres:



Source: created internally

Figure 3 is an offshoot of Figure 1 and synthesizes the concept of collaborative philanthropy.

**TABLE 4 – PLAYERS ACTING IN THE PUBLIC AGENDA**

PLAYERS	TYPES OF PLAYERS
<p><b>Players in Philanthropy and PSI</b>                      These players donate, invest, or manage private resources for the production of public good. They can be organizations and people who own or mobilize and manage resources to donate/ invest. They may be called social investors, philanthropists, grantmakers, financiers, funders or donors.</p>	Business, family or independent institutes and foundations (with their own resources or raising funds to support third-party projects/grantmaking)
	Funds
	Companies
	Family offices that manage family and individual assets for giving
	High-income families who make large donations
	Individuals who make systematic donations of varying sizes
<p><b>Other Non-Philanthropic Players</b>                      These are the other players involved in the search for a solution to the challenges in the public agenda. They are frequent partners in philanthropy and PSI.</p>	CSOs/NGOs that raise funds to implement projects
	Different spheres of the public sector (federal, municipal, or state government)
	Academia
	Support organizations and field infrastructure
	Social impact businesses
	International cooperation players



Source: created internally.

## 5.1 INTERSECTING GROUPS AND FORMATS

Based on Figure 3, this chapter briefly explains each group and mapped format. A series of references were used for the definitions of each format, in particular: Kania and Kramer (2011); John (2017); Eikenberry et al. (2009); Powell, Ditkoff and Hassey (2018). Added to related cases and conversations, these works contributed to drafting each description.

### 5.1.1 Group 1: Collaborative spaces of joint grants/co-investment among donors/philanthropic organizations focused on coordination, allocation or management of funds/donations

Collaborative spaces for joint grants/co-investment among philanthropic organizations or donors focused on the resource coordination, allocation and/or management, gathers formats in which there is deliberate participant intentionality (philanthropy and PSI players, organizations and/or individuals) to liaise and collaborate through joint grants/co-investment, focused mainly on resource coordination, allocation and/or management. This group includes a huge variety of collaborative philanthropy formats. All formats mentioned in Figure 3 are presented and described in the complete publication and were mapped in the research, but they certainly do not exhaust all the possibilities of existing formats.

### **Giving Circles**

Giving circles bring together individuals of common interests—in this case, grant making, in addition to a common cause—who contribute financial resources and make joint decisions about where these resources will be used.

### **Grant/Investment Coordination Spaces**

Created by philanthropic organizations or donors who work in the same cause or territory and create a space to share information about their performance strategies, priorities, data and information on the allocation of their resources in order to complement and coordinate the initiatives they promote.

### **Networks, Coalitions and Alliances**

They are generally characterized by bringing together organizations and people with common interests who decide to act together. They may have very different governance and management structures, as well as member profiles and numbers, but they are usually guided by the existence of a defined plan for the implementation of strategies and actions. These are collaborative philanthropy initiatives when they involve the joint grants/co-investment of several philanthropy players who participate to conduct the actions they develop.

### **Joint grants in Projects, Programs or Organizations**

(new or existing)

Funders co-invest together—whether or not with the same number of resources—to support a specific initiative or organization, or to create a new project or organization.

### **Fund the Funders**

Funders invest in another funder with solid experience in a topic or territory so that it distributes resources.

### **Public-Private Partnerships**

These are partnerships formed between government and private organizations to provide services or specific social benefits, to build, improve, monitor, measure or implement public policies, usually on a specific theme/initiative. They are collaborative philanthropy initiatives when they involve at least two philanthropy players who contribute resources together and collaborate with one another and with some governmental agency.

**Other Intersectoral Partnerships** (between philanthropy and universities or international cooperation)

Joint grants/co-investment initiatives among philanthropy players in partnership with other sectors. These are collaborative philanthropy initiatives when they involve at least two philanthropy players who contribute resources together and collaborate with one another as well as with other partners, such as the academia, the private sector or an international cooperation. These other non-philanthropic players can participate in the collaboration by providing financial or other resources, such as human resources, specific subject matter expertise, infrastructure, articulation and so on.

### **Collective Impact**

Collective impact initiatives can be defined as long-term commitments by a relevant group from different sectors, including various philanthropy players, who engage in a common agenda to solve a specific social problem. Actions are supported by a shared measurement system, activities that are mutually reinforced with continuous communication, and they have an independent organization that liaises, mobilizes and coordinates joint action.

There are five main characteristics that describe a collective impact initiative:

- a common agenda;
- a shared measurement system;
- activities that reinforce one another where all participants take complementary parts, always considering the set of actions;
- ongoing communication;
- an organization with adequate infrastructure and a dedicated team that centralizes general management and operate as a backbone for the initiative.

### **5.1.2 Group 2: Spaces for mobilizing and managing philanthropy resources**

Spaces for mobilizing and managing philanthropy resources, including formats that focus primarily on collaboratively mobilizing resources, expanding the donor base. For this reason, many of the formats included in this group are architectures that seek to engage the general population (or segments of it) in the giving, though not exclusively.

They are organizations and strategies created from the development of new architectures to mobilize resources collaboratively/

collectively for actions of public interest. The fundamental purpose is to mobilize philanthropy resources and social investment, with very different management and allocation formats.

### **Crowdfunding or Collective Financing**

A form of raising financial resources for a specific cause or project, requesting that many people contribute usually low amounts (via donations, loans, or investments) during a relatively short period of time—mostly 1-3 months. Crowdfunding campaigns are conducted virtually, on specific platforms for this mode.

### **Matching**

Donations are linked to the mobilization of resources from other sources in a previously determined proportion. When adopting a matching strategy, philanthropic organizations or one donor commit to giving once, twice, three or X times the funds raised by other sources, which can be unique and specific or diverse and indeterminate.

### **Philanthropic Resource Management Organizations**

These are organizations that have the mission of mobilizing, managing and distributing resources. With different strategies and modes of operation, they raise funds from companies, high-income individuals or the general population and transfer them to projects, territories, or other organizations for the development of public endeavors.

### **5.1.3 Group 3: Philanthropic funds**

Philanthropic funds encompasses initiatives that come in the form of funds. With varied architectures, these funds have grown and gained space and relevance in the sector as an effective model to gather expressive resources aimed at well-defined causes or territories. This format has the potential to combine intentionality in collaborative resource management and allocation, but also in the mobilization of financial resources through collaboration; that is, engaging a wide number of donors with different profiles.

Funds so raised can be directed to a specific cause, agenda, or territory, or they can be multi-agenda—which vary or expand over time or according to the context. Resources are usually directed at CSOs or other partners who have been somehow mapped and enabled to receive them.

Philanthropy funds are an effective format to mobilize financial resources for a specific cause (GENEVA GLOBAL, 2020). They facilitate collaboration and joint financing between stakeholders, offering donors a simple way to promote the impact of their social investments in alignment with their thematic agendas. When formed with this approach, philanthropy funds are collaborative philanthropy initiatives.

Here again, the principle that one thing does not exclude the other applies. Thus, it is very likely that the same initiative integrates characteristics of more than one mapped format and even more than one group. It will not always be immediately possible to identify which is the collaborative philanthropy format that most closely adheres to the initiative under analysis and it may often fit, proportionally, in more than one of these formats. Again, the proposal is to present concepts and definitions that can contribute to the reflection on whether what the philanthropic organization/donor does (or elaborates) is what actually best suits the objectives they are looking for rather than establish closed, strict, or limiting classifications. The organization of groups and the systematization of formats also help understand the architectures that make up the realm of collaborative philanthropy, as a first step to smooth out the journey. The second step is to delve in the practical examples mapped in chapters 6 and 7—which are only listed with basic information in this short version. They exemplify initiatives in each of the formats presented, and the full, more detailed publication can be found in the Portuguese language.

Another important point is that the definitions presented here are not legal or juridical concepts, though some of them may have conceptually close and correlated legal formats. The purpose is to map formats that can be used and implemented by different legal figures, or independently thereof, identified by their characteristics and by how the initiatives are presented and described.

### **Philanthropic Fund created and/or managed by organizations**

In the context of collaborative philanthropy, formats that contain a combination of philanthropy and social investment resources, grouped under a defined mandate and established governance, are called funds and they thus combine resources from different sources to support initiatives of public interest.

When using such a format, the initiative often incorporates the word “fund” in its name or main description. In other cases, an initiative



called an alliance—present in group 1—or a philanthropy resource management organization—identified in group 2—can create funds from the mobilized resources and present them publicly, also using this word. Though not all funds are collaborative philanthropy initiatives in this field, as the resources can originate from a single source, the origin of a fund’s resources quite frequently involves different donors who also contribute because they know their contributions will be added to the funds of other grantmakers.

### **Fund formally constituted as an organization**

A fund may be also formally constituted as an organization per se, or hosted as part of an organization. It can be a perennial fund or a fund with a fixed term of existence—varying from months to years. It can be focused on a theme or have either a broader or a specific focus, as it can also be focused on a multi-agenda territory, or even a combination of geographical focuses with a specific agenda.

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This mapping of practical collaborative philanthropy formats—considering that the concept can be understood generically as a way of conducting philanthropy—reaffirms the countless possibilities of potential models, many of which are certainly yet to be invented. On the other hand, challenges to its applications are potential impediments to the development of initiatives. Suffice it to emphasize that all the points brought up in chapter 4—presented in the form of challenges or success factors for collaboration—and also in chapter 3 are integral and, in many cases, especially applicable to the set of formats and collaborative philanthropy architectures. Among all the points there, one emerges as a fundamental challenge and a key success factor when properly resolved: initiative governance.

In addition to that, the idea of collaborative philanthropy as a way of conducting philanthropy comes very close to two other ideas—strategies and concepts—that are present in the contemporary debate: grantmaking and community philanthropy.

Thus, the relationship between collaborative philanthropy and governance, grantmaking and community philanthropy is covered in greater depth below.

**The Governance will define the system by which the collaborative philanthropy initiative will be managed, monitored, and encouraged, involving relationships between participating members, between the initiative and the governance bodies of each member organization and other interested parties.**

## **5.2 GOVERNANCE AS KEY ELEMENT**

Governance structuring is perhaps the most determining element for success in collaborative philanthropy initiatives. Here, the concept of governance refers to the system by which the collaborative philanthropy initiative will be managed, monitored, and encouraged, involving relationships between participating members, between the initiative and the governance bodies of each member organization and other interested parties (IBGC, n.d.).

Collaborative philanthropy initiatives often die from being left orphaned or ownerless. Likewise, they can also wane because they have too many owners. Many of the points made in chapter 4, on challenges and success factors for collaboration, have a direct or indirect relationship with aspects related to governance.

Returning to one of them to begin thinking about the governance of a collaborative philanthropy initiative: “if the collaborative effort is not mine or if it is mine to the same extent that it belongs to all others involved.” This certainly does not mean refraining from seeking to influence or participate in decisions, but accepting this fact is the first step to more fluidly start the fundamental conversation about governance in a collaborative philanthropy initiative. Such conversation—which certainly breaks down into many others—needs to set the points of the agreements that will be established and define the rules of the game, so that everyone knows what the limits of their participation in the initiative are, with respect for the other’s participation.

That being said, there is no recipe for good governance in collaborative philanthropy initiatives. There are countless ways to think about governance, in addition to the tools, studies and guidelines available on the subject. Without the intent of going further in depth, some precautions may be observed to facilitate the process.

- **Avoid trying to replicate the internal processes of an organization represented in the initiative** and ensure that it is willing to create a model that is built by initiative members, legitimized by everyone and suitable to it. Though governance formats can vary greatly, they may need to be more horizontal and matrix-based than the models often found in organizations participating in the collaborative philanthropy initiative.

- **If you already come from a horizontal and matrix governance model, then you may need a little patience** to understand that most of your fellow entrepreneurs probably have more traditional models as a reference, and you need to exercise empathy to understand them and build consensus, with processes that make everyone comfortable.
- **Horizontal models (more of them) do not necessarily mean that all decisions need to be made together or in consensus—**finding a balance between that extreme and the existence of someone, an instance or a single organization that centralizes all decisions is part of the construction process for governance.
- **The fact that there is an organization that manages the initiative should not be an impediment to the involvement of other participants.** When this happens, there is great risk that the initiative will assume the management organization's identity and lose its collaborative nature. This is not a problem when it comes to a conscious stakeholder decision, but it can be a problem when that is not the case. The ideal balance to avoid it is a process that needs to be built and revisited whenever necessary.
- **It takes time and energy to think about the governance construction process,** its implementation and the engagement of all initiative stakeholders.
- **It is much easier to accept and submit to combinations that are built with the participation of everyone who will have to carry them out.** When an organization goes through the process of building agreements and their inevitable ups and downs, bringing its needs to the table and giving in at the same time that it becomes aware of stakeholder efforts and concessions makes it much easier to comply with the decisions generated in the process. Thus, it is important to adopt the most participatory option possible among stakeholders.
- **In the governance definition process, once again, leader engagement is fundamental.** The pillars of governance may possibly start from the initial agreements—usually non-formal agreements—that are made between the leaders.
- **The governance process needs to include a governance review.** There are many reasons for this. Often the players who start the initiative make clear and very complete agreements, but when new players join in, even if initially, it is only natural that they start to question some of the current rules with

time and practical experience. In other cases, the passage of time and the development of the initiative—which can grow a great deal, change focus and so on—changes the environment and make new agreements necessary. Another hypothesis is that the agreements made are simply not working and more than adjustments are needed to solve the resulting issues. It is important to establish periodic reviews, which should not be arbitrary, and to define when they should be made, whether for adjustments or for further structuring.

In addition to these precautions, many of the questions presented in Table 1 of chapter 2, which help understand and characterize collaborative initiatives, should be answered on the basis of agreements and pacts established by the governance structuring process.

## **5.3 CONNECTING POINTS WITH OTHER PHILANTHROPY STRATEGIES**

### **5.3.1 Participatory Philanthropy**

The inclusion of participatory approaches adapted to the practice of institutional philanthropy can also be called participatory philanthropy.

Collaborating includes a larger range of stakeholders and, therefore, participatory mechanisms ought to be created so that everyone can, indeed, act together.

Therefore, it is obvious that participatory approaches are an inherent part of collaborative philanthropy initiatives, as well as the other dimensions of collaboration proposed in chapter 2.

### **5.3.2 Grantmaking**

Grantmaking is an important strategy in the field of PSI that involves the transfer of financial resources to third parties. Collaborative philanthropy initiatives invite investors to stop being instructed only by their own isolated guidelines and start being instructed by a common agenda and strategy that become a joint action plan, very often structured through a grantmaking strategy. For this reason, these structuring processes, conducted collaboratively between stakeholders, have the potential to improve and develop new grantmaking strategies.

### 5.3.3 Participatory Grantmaking

Participatory grantmaking is a potential answer and ally to counter one of the main risks of collaborative philanthropy architectures: the concentration of resources and power in the hands of a small group of donors.

### 5.3.4 Community Philanthropy

There are two main ways to apply the term community philanthropy. The first one refers to a specific type of PSI organization: formal, independent and public purpose institutions dedicated to improving people's lives in a geographic or thematic area. They collect financial resources to support initiatives, leaders, or non-profit organizations with effective actions in their communities and, therefore, they can be considered as collaborative philanthropy architectures *per se*. They commonly use grantmaking strategies.

The second and more comprehensive one is a way of doing philanthropy. Such practice counts on the engagement of communities involved in the initiatives to shift power towards these people, intrinsically involving them in with joint responsibility over the entire process, from creation to implementation, including the search for and donation of mobilized resources among community stakeholders. This is why this form of conducting philanthropy benefits—and is enhanced when implemented in conjunction with—collaborative philanthropy architectures that make it possible to engage these players and mobilize a broader spectrum of donors.

# PART II



**COLLABORATIVE  
PHILANTHROPY  
IN PRACTICE:  
INSPIRING  
CASES**



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Chapters 6 and 7 of the publication are dedicated to collaborative philanthropy in practice. There are examples and cases of experiences, projects, organizations, or initiatives that use collaboration to mobilize, coordinate, manage or allocate private financial resources—from individuals, foundations, companies, and other types of organizations—for the production of public good.

Based on its nature, history, positioning and way of presenting itself to the world, each case is related to the groups and formats of collaborative philanthropy mapped in chapter 5.

Through this set of varied and quite diverse experiences—in relation to the volume of resources, causes, number of players involved, region of operation, modes of collaboration, among other variables—the potential of collaborative philanthropy can be seen in a more concrete manner and in its multiple ways of materializing.

Innovation comes forth as a key element to create new initiatives in the search for answers to the challenges faced and for the development of new models of mobilization, management and financial resource allocation. The panorama formed by these experiences also indicates that there certainly is room for new forms of collaborative philanthropy to be created.

To facilitate an understanding of and research into the experiences presented, each case was classified in one or more of the three groups of collaborative philanthropy presented in chapter 2 and, with more details, in chapter 5.1:

- **group 1:** collaborative joint grant/co-investment spaces between philanthropic organizations/donors focused on resource coordination, allocation and/or management;
- **group 2:** philanthropy resource mobilization and management spaces;
- **group 3:** philanthropy funds.

As many of the following experiences may have typical to more than one group, a predominant group (1, 2 or 3) was established for each one. Cases are thus presented in the order of the groups: first, the cases classified primarily in group 1, followed by those that predominantly fitting into group 2, and, finally, examples that illustrate group 3. Within each group, cases are in alphabetical order.

In addition to the groups, the formats of each group that interface with initiative characteristics are also indicated. Review the existing groups and formats in Figure 4.



**FIGURE 4 – COLLABORATIVE PHILANTHROPY GROUPS AND FORMATS**



Source: created internally

In this summary, we present the tables that open chapters 6 and 7 of the book, which contain the primary information of the mapped cases. In addition to groups and formats, the tables include important characteristics of each example, such as the year of creation, volume of resources involved, players who contribute resources, focus of action and link to the initiative. In this presentation, in addition to the main group identified for each case, the other collaborative philanthropy groups that characterize it and the corresponding formats within them are also pointed out.

To learn more about each case, you can access the full publication available in Portuguese or the websites of the initiatives that are indicated in each one.

**May these initiatives inspire you!**



The background is a solid orange color. It features several white geometric lines: a horizontal line near the top, a horizontal line near the bottom, and two diagonal lines crossing each other in the center-right area. The text is positioned on the left side of the page.

**CHAPTER 6**

# Cases in Brazil

Collaborative Philanthropy Group and Formats	Subchapter	Collaborative Philanthropy Initiative and Formats	Secondary Group and Formats	Year Established	Volume of Resources
<p><b>GROUP 1</b> Espaços colaborativos de investimento entre investidores sociais focados na coordenação, alocação e/ ou gestão dos recursos</p> <p><b>FORMATOS:</b></p> <p><b>1.1</b> Círculos de doação (<i>giving circles</i>)</p> <p><b>1.2</b> Espaços de coordenação de investimentos</p> <p><b>1.3</b> Redes, coalizões e alianças</p> <p><b>1.4</b> Coinvestimento em projetos, programas ou organizações – novos ou existentes</p> <p><b>1.5</b> Financiamento de financiadores</p> <p><b>1.6</b> Parcerias público-privadas</p> <p><b>1.7</b> Outras parcerias intersetoriais (entre investidores sociais privados e academia ou cooperação internacional)</p> <p><b>1.8</b> Impacto coletivo</p>	<b>6.1</b>	<p>Public Sector and Third Sector Impact Leaders Alliance</p> <p>Group 1 Formats: 1.2, 1.3, 1.4, 1.6</p>	-	2018	u/a
	<b>6.2</b>	<p>Joint Investment in the Circuitos Agroecológicos/ Tabôa Platform</p> <p>Group 1 Formats: 1.2, 1.3, 1.4, 1.5</p>	-	2015 (Tabôa); 2019 (Circuitos Agroecológicos)	R\$4.2M
	<b>6.3</b>	<p>Educação Já!</p> <p>Group 1 Formats: 1.2, 1.3, 1.6, 1.8</p>	-	2018	u/a
	<b>6.4</b>	<p>Collaboration in public policy for full-time high school</p> <p>Group 1 Formats: 1.2, 1.3, 1.6, 1.8</p>	-	u/a	u/a
	<b>6.5</b>	<p>FIIMP 1 and 2</p> <p>Group 1 Formats: 1.2, 1.3, 1.4, 1.5</p>	<p>Group 2 Formats: 2.2</p>	<p>FIIMP 1 – 2017</p> <p>FIIMP 2 – 2019</p>	<p>FIIMP 1 – R\$703 thousand</p> <p>FIIMP 2 – R\$1.8M</p>

Some Stakeholders Contributing Resources	Area of Action	Link for More Information
<p><b>6.1</b></p> <p>Fundação Brava, Fundação Lemann, Instituto Humanize and República.org</p>	<p>People management and leadership in government and the third sector</p>	<p><a href="https://fundacaolemann.org.br/projetos/pessoas-no-setor-publico">https://fundacaolemann.org.br/projetos/pessoas-no-setor-publico</a></p>
<p><b>6.2</b></p> <p>Porticus, Instituto Ibirapitanga, Instituto Arapyau, Instituto Humanize and FUNBIO</p>	<p>Reinforcing agroecology networks, acting on four strategic pillars: production, regularization of agro-industries, commercialization and credit.</p>	<p><a href="http://www.circuitosagroecologicos.org.br">http://www.circuitosagroecologicos.org.br</a></p>
<p><b>6.3</b></p> <p>Daniel Goldberg, Família Kishimoto, Fundação Bradesco, Fundação Lemann, FLUPP, Fundação Maria Cecília Souto Vidigal, Fundação Telefônica Vivo, Fundação Vale, Gol, Instituto MRV, Instituto Natura, Instituto Península, Itaú BBA, Itaú Social, Instituto Unibanco, Milú Villela, Prisma Capital, Scheffer and Associação Crescer Sempre</p>	<p>Production of knowledge, advocacy and designation of stakeholders for improving the quality of basic public education in Brazil</p>	<p><a href="https://www.todospelaeducacao.org.br/pag/iniciativa-educacao-ja">https://www.todospelaeducacao.org.br/pag/iniciativa-educacao-ja</a></p>
<p><b>6.4</b></p> <p>Instituto Natura, Instituto Sonho Grande and Instituto de Corresponsabilidade pela Educação</p>	<p>Education / Full-Time High School and Public Policies</p>	<p><a href="https://www.institutonatura.org.br/iniciativa/escola-em-tempo-integral-comunidade-de-aprendizagem/">https://www.institutonatura.org.br/iniciativa/escola-em-tempo-integral-comunidade-de-aprendizagem/</a></p>
<p><b>6.5</b></p> <p>Instituto de Cidadania Empresarial (ICE), Instituto InterCement, Fundação BMW, Fundação Grupo Boticário de Proteção à Natureza, Fundação Lemann, Fundação Otacilio Coser (FOCO), Fundação Raízen, Childhood, Fundação Telefônica Vivo, Fundação Tide Setubal, Fundo Vale, Instituto Ayrton Senna, Instituto Coca-Cola, Instituto Cyrela, Instituto EDP, Instituto Holcim, Instituto Phi, Instituto Sabin, Instituto Samuel Klein, Instituto Vedacit, Instituto Votorantim and Oi Futuro</p>	<p>Multiple causes through support for social impact businesses</p>	<p><a href="https://ice.org.br/fiimp-2-aposta-no-papel-das-organizacoes-intermediarias-para-fomentar-o-setor-de-impacto-no-brasil-conheca-as-iniciativas/">https://ice.org.br/fiimp-2-aposta-no-papel-das-organizacoes-intermediarias-para-fomentar-o-setor-de-impacto-no-brasil-conheca-as-iniciativas/</a></p>

Collaborative Philanthropy Group and Formats	Subchapter	Collaborative Philanthropy Initiative and Formats	Secondary Group and Formats	Year Established	Volume of Resources
<p><b>GRUPO 1</b> Collaborative joint investment spaces between social investors focused on coordination, allocation and/ or resource management</p> <p><b>FORMATS:</b></p> <p><b>1.1</b> Giving Circles</p> <p><b>1.2</b> Investment Coordination Spaces</p> <p><b>1.3</b> Networks, coalitions and alliances</p> <p><b>1.4</b> Joint Investment in Projects, Programs or Organizations – New or Existing</p> <p><b>1.5</b> Financing from Financiers</p> <p><b>1.6</b> Public-Private Partnerships</p> <p><b>1.7</b> Other Intersectoral Partnerships (between private social investors and academia or international cooperation)</p> <p><b>1.8</b> Collective Impact</p>	<b>6.6</b>	+Unidos  Group 1 Formats: 1.3, 1.4, 1.5, 1.7	Group 3 Formats: 3.1	2008	R\$2,905,494.00 (2012-2018)
	<b>6.7</b>	Movimento Bem Maior (MBM)/ Fundo Emergencial para a Saúde  Group 1 Formats: 1.3, 1.4	Group 2 Formats: 2.1, 2.2  Group 3 Formats: 3.2	2019	Movimento Bem Maior: nearly R\$5M in the first public call for support for social organizations (2019)  Fundo Emergencial para a Saúde: over R\$38M (between March and June 2020)
	<b>6.8</b>	Parceiros pela Amazônia, PPA  Group 1 Formats: 1.3, 1.4, 1.7	-	2017	R\$1.1M (2018) R\$4.8M (2019)
	<b>6.9</b>	Programa de Aceleração de Impacto Social, PAIS  Group 1 Formats: 1.2, 1.3, 1.4	-	2018	R\$360,000 (2018-2020)
	<b>6.10</b>	Juntos Program  Group 1 Formats: 1.3, 1.4, 1.7	-	2012	R\$5,269,921.00 in donations (2019) to 87 initiatives for organized civil society

Some Stakeholders Contributing Resources	Area of Action	Link for More Information
<p><b>6.6</b></p> <p>Bank of America, Burson-Marsteller, Coca-Cola, Cummins, Dow, ExxonMobil, FedEx, Hilton, KPMG, Microsoft, Motorola Solutions, PayPal, Qualcomm e Trench Rossi Watanabe and USAID</p>	<p>Education: promoting public-private partnerships in educational projects that encourage skills for job placement for young people</p>	<p><a href="https://maisunidos.org/">https://maisunidos.org/</a></p>
<p><b>6.7</b></p> <p>MBM: Eugênio Mattar, CEO of Localiza; Luciano Huck, TV host; Rubens Menin, Chairman and CEO of MRV Engenharia; João Araújo, Grupo Buritipar; Elie Horn, founder of Cyrela</p> <p>Emergency Health Care Fund: several companies, foundations, institutes and private individuals</p>	<p>Multiple causes and giving culture</p> <p>Health care / fighting the novel coronavirus pandemic</p>	<p><a href="https://movimentobem maior.org/">https://movimentobem maior.org/</a></p> <p><a href="https://www.bsocial.com.br/causa/fundo-emergencial-para-a-saude-coronavirus-brasil">https://www.bsocial.com.br/causa/fundo-emergencial-para-a-saude-coronavirus-brasil</a></p>
<p><b>6.8</b></p> <p>SITAWI, USAID, Conexsus, Fundo Vale, Instituto Humanize, FIIMP (case 6.5), Grupo Rede Amazônica and Althelia Funds</p>	<p>Sustainable development of the Amazon</p>	<p><a href="https://ppa.org.br/">https://ppa.org.br/</a></p>
<p><b>6.9</b></p> <p>Instituto Sabin, Instituto BRB, Instituto Cooperforte, Instituto Bancobrás and Phomenta</p>	<p>CSO empowerment</p>	<p><a href="http://institutobrb.org.br/2018/05/04/programa-de-aceleracao-de-impacto-social-pais/">http://institutobrb.org.br/2018/05/04/programa-de-aceleracao-de-impacto-social-pais/</a></p>
<p><b>6.10</b></p> <p>Business leaders: Ricardo Villela Marino, Lúcio de Castro Andrade, José Roberto Marinho, Carlos Jeressati Filho, Pedro Jeressati, Elie Horn, José Eduardo Queiroz, José Ermírio de Moraes Neto, Rubens Ometto, Roberto Setubal, Solange Ribeiro, Pedro Paulo Diniz, Jorge Gerdau, Eduardo Mufareg, Ana Helena Vicentin, Julio Fontana, José Eduardo Carneiro and Luiz Lara</p>	<p>Municipal and state management innovation in a variety of areas</p>	<p><a href="https://www.comunitas.org/programa-juntos/">https://www.comunitas.org/programa-juntos/</a></p>

Collaborative Philanthropy Group and Formats	Subchapter	Collaborative Philanthropy Initiative and Formats	Secondary Group and Formats	Year Established	Volume of Resources
<b>GROUP 2:</b> Philanthropy financial resource mobilization and management spaces  <b>FORMATOS:</b>  <b>2.1</b> Crowdfunding or Collective Financing  <b>2.2</b> Matching  <b>2.3</b> Philanthropic Resource Management Organizations	<b>6.11</b>	Confluent  Group 2 Formats: 2.3	Group 1 Formats: 1.1, 1.4	2019	u/a
	<b>6.12</b>	Editora Mol / Sorria Magazine  Group 2 Formats: 2.3	Group 3 Formats: 3.2	2007	33 million (2008-2019)
	<b>6.13</b>	Instituto Phi  Group 2 Formats: 2.1, 2.2	-	2014	R\$60M (2014-2020)
	<b>6.14</b>	Liga Social  Group 2 Formats: 2.1, 2.3	-	2015	u/a
	<b>6.15</b>	Enfrente o Corona Matchfunding  Group 2 Formats: 2.1, 2.2	Group 1 Format: 1.4  Group 3 Formats: 3.2	2019	R\$ 4,600,000.00 (updated in April 2020)
	<b>6.16</b>	Movimento Arredondar  Group 2 Formats: 2.1, 2.3	Group 3 Formats: 3.2	2011	R\$4,811,726.35 (2011-2018)
	<b>6.17</b>	Ribon  Group 2 Formats: 2.1, 2.3	-	2016	R\$200,000 (2016-2019)



Some Stakeholders Contributing Resources	Area of Action	Link for More Information
<p><b>6.11</b></p> <p>Private individuals (list available on the initiative site when authorized); Instituto Betty e Jacob Lafer, Instituto Ibirapitanga, OAK Foundation, Fundação Tide Setubal and Open Society Foundation</p>		<p><a href="https://www.confluentes.org.br/">https://www.confluentes.org.br/</a></p>
<p><b>6.12</b></p> <p>Individuals who buy Sorria magazine</p>	<p>Miscellaneous causes</p>	<p><a href="http://www.editoramol.com.br/impacto">www.editoramol.com.br/impacto</a></p>
<p><b>6.13</b></p> <p>Bem Maior, Bees of Love, B Social, FIIMP2, Pinheiro Neto, Projeto Colabora, Instituto Rio, Fundação ABH, BSocial, SPX, BMW Foundation, Órama, Turim, Lecca, Carpa, 4K, Klabin, Mare Investimentos, Mitsubishi Corporation, BMA and individual high-income donors</p>	<p>Miscellaneous causes</p>	<p><a href="https://institutophi.org.br/">https://institutophi.org.br/</a></p>
<p><b>6.14</b></p> <p>Individual Donors</p>	<p>Miscellaneous causes</p>	<p><a href="https://institutoligasocial.org.br/">https://institutoligasocial.org.br/</a></p>
<p><b>6.15</b></p> <p>Fundação Tide Setubal, Fundação Arymax, Itaú Social, Instituto Galo da Manhã, Fundação José Luiz Egydio Setubal, Fundação FEAC, Instituto Humanize, Extra/Instituto GPA and private individuals who donated via crowdfunding on the Benfeitoria platform.</p>	<p>Support for suburbs (at the time of publication, focusing specifically on a variety of actions against coronavirus)</p>	<p><a href="https://benfeitoria.com/canal/enfrente">https://benfeitoria.com/canal/enfrente</a></p>
<p><b>6.16</b></p> <p>Individuals who round up their purchases. Organizations and people who give resources directly to the Movimento for management and technological development, such as Google and Fundo BIS</p>	<p>Miscellaneous causes</p>	<p><a href="https://www.arredondar.org.br/">https://www.arredondar.org.br/</a></p>
<p><b>6.17</b></p> <p>Companies and other organizations that create ads as well as users (individual donors)</p>	<p>Miscellaneous causes</p>	<p><a href="https://ribon.io/">https://ribon.io/</a></p>

Collaborative Philanthropy Group and Formats	Subchapter	Collaborative Philanthropy Initiative and Formats	Secondary Group and Formats	Year Established	Volume of Resources
<b>GROUP 3:</b> Philanthropy Funds  <b>FORMATOS:</b>  <b>3.1</b> Funds that are organizations  <b>3.2.</b> Funds created and managed by an organization or by a group of organizations	<b>6.18</b>	Fundo Brasil de Direitos Humanos  Group 3 Formats: 3.1, 3.2	Group 2 Formats: 2.3	2006	R\$5,269,921.00 in financial donations to 87 initiatives for organized civil society (2019)
	<b>6.19</b>	Fundo Baobá / Marielle Franco Program  Group 3 Formats: 3.1, 3.2	Group 2 Formats: 2.3	2011 (Fundo Baobá); 2018 (Marielle Franco Program)	US\$3 million (Marielle Franco Program 2019-2023)
	<b>6.20</b>	Fundo Elas  Group 3 Formats: 3.1, 3.2	Group 2 Formats: 2.3	2000	R\$26M (2002-2019)  R\$5,443,235 for 71 supported projects (2018)
	<b>6.21</b>	Fundo Socioambiental Casa  Group 3 Formats: 3.1, 3.2	Group 2 Formats: 2.3	2006	R\$ 10.073.467.67 (2018)

Some Stakeholders Contributing Resources	Area of Action	Link for More Information
<p><b>6.18</b></p> <p>Ford Foundation, OAK Foundation, Brot Fur Die Welt, Climate and Land Use Alliance, Instituto C&amp;A, Instituto Bete &amp; Jacob Lafer, Open Society Foundation, Sesc, Fundação Tide Setubal and individual donors</p>	<p>Human rights promotion and defense throughout Brazil</p>	<p><a href="https://www.fundobrasil.org.br/">https://www.fundobrasil.org.br/</a></p>
<p><b>6.19</b></p> <p>Fundo Baobá: W.K. Kellogg Foundation, Ford Foundation, Instituto Unibanco, Instituto Coca Cola, OAK Foundation, RiHappy, Johnson &amp; Johnson, Estrela, Coca Cola, Instituto Arapyaú, Open Society, Instituto Ibirapitanga, Tides What's Possible, Fundo Socioambiental Caixa, Instituto Lojas Renner</p> <p>Marielle Franco Program: Fundo Baobá, Kellogg Foundation, Open Society Foundation, Ford Foundation and Instituto Ibirapitanga</p>	<p>Racial equality promotion in Brazil</p> <p>Development and acceleration of black female leaders</p>	<p><a href="https://baoba.org.br/">https://baoba.org.br/</a></p> <p><a href="https://baoba.org.br/programa-marielle-franco-de-aceleracao-do-desenvolvimento-de-liderancas-femininas-negras/">https://baoba.org.br/programa-marielle-franco-de-aceleracao-do-desenvolvimento-de-liderancas-femininas-negras/</a></p>
<p><b>6.20</b></p> <p>Instituto Avon, Ford Foundation, OAK Foundation, ONU Mulheres, Chevron, MAC, Mamacash, Levi Strauss Foundation, Fundação Heinrich Boll, Sigrid Rausing Trust, Filia die Frauenstiftung, Cordaid, Ashoka, Act!Onaid, Artemisia, Astrea, Global Found Dor Women, Hivos, W.K. Kellogg Foundation, Instituto Unibanco, Open Society, British Council, private individuals</p>	<p>Support projects that encourage and empower female leadership</p>	<p><a href="http://www.fundosocialelas.org/">http://www.fundosocialelas.org/</a></p>
<p><b>6.21</b></p> <p>Fundo Socioambiental Caixa, Forest Trends, Instituto Clima e Sociedade, Articulação Global Grengrants Fund (GGF), Fundo Sulamericano – Charles Stewart /Mott, Fondo Centro Americano de Mujeres (FCAM), Clark University, Freedom House, Inter-American Foundation, Both Ends, individual donors</p>	<p>Support for small and community projects in Latin America that undertake socioenvironmental projects</p>	<p><a href="https://www.casa.org.br/pt/F">https://www.casa.org.br/pt/F</a></p>



CHAPTER 7

Regional and  
Global Cases

Collaborative Philanthropy Group and Formats	Subchapter	Collaborative Philanthropy Initiative and Formats	Secondary Group and Formats	Year Established	Volume of Resources	
<b>GROUP 1</b> Collaborative co-investment spaces among social investors focused on coordination, allocation and/or resource management  <b>FORMATS:</b>  <b>1.1</b> Giving Circles  <b>1.2</b> Investment Coordination Spaces  <b>1.3</b> Networks, coalitions and alliances  <b>1.4</b> Co-investment in Projects, Programs or Organizations – New or Existing  <b>1.5</b> Funding funders  <b>1.6</b> Public-Private Partnerships  <b>1.7</b> Other Intersector Partnerships (between private social investors and academia or international cooperation)  <b>1.8</b> Collective Impact	<b>7.1</b>	Asia Philanthropy Circle  Group 1 Formats: 1.1, 1.2, 1.3, 1.4	-	2015	US\$1,163,998 (2019)  US\$1,363,261 (2018)	
	<b>7.2</b>	Climate and Land Use Alliance (CLUA)  Group 1 Formats: 1.3, 1.4	-	2010	US\$470M (2010-2018)	
	<b>7.3</b>	Co-Impact  Group 1 Formats: 1.2, 1.3, 1.4, 1.6, 1.8	Group 2 Formats: 2.3  Group 3 Formats: 3.2	2017	US\$80 million (2019, first round of financing)	
	<b>7.4</b>	Regional Inclusive Recycling Initiative  Group 1 Formats: 1.4, 1.7	-	2011	-	
	<b>7.5</b>	Ocean 5  Group 1 Formats: 1.2, 1.3, 1.4, 1.6, 1.8	-	2011	Over US\$9B (2019)	

Some Stakeholders Contributing Resources	Area of Action	Link for More Information
<p><b>7.1</b></p> <p>Unavailable information on donors, but the goal is 100 members in 10 years.</p>	<p>Building an Asian identity for philanthropy, miscellaneous causes</p>	<p><a href="https://asiaphilanthropycircle.org/">https://asiaphilanthropycircle.org/</a></p>
<p><b>7.2</b></p> <p>ClimateWorks Foundation, Ford Foundation, David &amp; Lucile Packard, Gordon &amp; Betty Moore Foundation, Margaret A. Cargill Philanthropies (MACP) and Good Energies Foundation</p>	<p>Climate change and forest preservation</p>	<p><a href="https://www.climateandlandusealliance.org">https://www.climateandlandusealliance.org</a></p>
<p><b>7.3</b></p> <p>Richard F. Chandler, Bill e Melinda Gates, The Rockefeller Foundation, Jeff Skoll, Rohini e Nandan Nilekani, The ELMA Foundation</p> <p>Local companies, non-profit organizations, governments, companies, individual donors and others</p>	<p>Gender equality, health, education and economic development in southern countries</p>	<p><a href="https://www.co-impact.org/">https://www.co-impact.org/</a></p>
<p><b>7.4</b></p> <p>Coca-Cola, PepsiCo, Rede Latino Americana e do Caribe de Catadores and Fundación Avina</p>	<p>Waste management, recycling, economic inclusion, income generation, support for refuse collectors</p>	<p><a href="https://reciclajeinclusivo.org/irt/">https://reciclajeinclusivo.org/irt/</a></p>
<p><b>7.5</b></p> <p>OAK Foundation, Marisla Foundation, Bloomberg Philanthropies, Moore Charitable Foundation, Spring Point, Planet Heritage Foundation, The Tiffany and Co. Foundation, Waitt Foundation, The Wyss Foundation, Paul M. Angell Family Foundation, The David Lucile &amp; Packard Foundation</p>	<p>Oceans: supporting projects that eliminate overfishing around the world by 2030 and creating 30% of the world's protected marine areas</p>	<p><a href="https://www.oceans5.org/">https://www.oceans5.org/</a></p>

Collaborative Philanthropy Group and Formats	Subchapter	Collaborative Philanthropy Initiative and Formats	Secondary Group and Formats	Year Established	Volume of Resources
<p><b>GROUP 2:</b> Philanthropy resource mobilization and management spaces</p> <p><b>FORMATS:</b></p> <p><b>2.1</b> Crowdfunding or Collective Grantmaking</p> <p><b>2.2</b> Matching</p> <p><b>2.3</b> Philanthropy Resource Management Organizations</p>	<b>7.6</b>	<p>Global Giving/ Pilot Participatory Grantmaking Project for Recovery from the 2017 Earthquakes in Mexico</p> <p>Group 2 Formats: 2.1, 2.3</p>	<p>Group 3 Formats: 3.2</p>	<p>Global giving: 2002</p> <p>Pilot project: 2017</p>	<p>US\$480 million (2002-2019)</p> <p>US\$10 thousand (2019, pilot project)</p>
	<b>7.7</b>	<p>The Funding Network (TFN)</p> <p>Group 2 Formats: 2.3, 2.1</p>	<p>Group 1 Formats: 1.4</p>	2002	US\$25.6M (since 2002)
<p><b>GROUP 3:</b> Philanthropy Funds</p> <p><b>FORMATS:</b></p> <p><b>3.1</b> Funds that are organizations</p> <p><b>3.2</b> Funds created and managed by an organization or by a group of organizations</p>	<b>7.8</b>	<p>EPIC Public Voice Fund</p> <p>Group 3 Formats: 3.2</p>	<p>Group 1 Formats: 1.3, 1.4</p>	1994	US\$ 2,099,893.00 (2018)
	<b>7.9</b>	<p>Network of European Foundations (NEF)</p> <p>Group 3 Formats: 3.2</p>	<p>Group 1 Formats: 1.4</p>	1976	<p>€4,567,163.86 (2018)</p> <p>€3,688,774.83 (2017)</p> <p>€2,866,007.04 (2016)</p>



Some Stakeholders Contributing Resources	Area of Action	Link for More Information
<p><b>7.6</b></p> <p>Skoll Foundation, Omidyar Foundation, Sall Foundation, William e Flora Hewlett Foundation, Mott Foundation, Kellogg Foundation, Calvert Foundation, USAID and thousands of individual donors</p>	<p>Recovery support after the 2017 earthquakes in Mexico</p>	<p><a href="https://www.globalgiving.org/">https://www.globalgiving.org/</a></p> <p><a href="https://grantlab.gife.org.br/case-global-giving-projeto-piloto-de-grantmaking-participativo-para-recuperacao-dos-terremotos-do-mexico/">https://grantlab.gife.org.br/case-global-giving-projeto-piloto-de-grantmaking-participativo-para-recuperacao-dos-terremotos-do-mexico/</a></p>
<p><b>7.7</b></p> <p>Companies, foundations and thousands of people in the 13 countries where the initiative is present</p>	<p>Miscellaneous Causes</p>	<p><a href="https://www.thefundingnetwork.org.uk/">https://www.thefundingnetwork.org.uk/</a> (United Kingdom)</p> <p><a href="https://www.thefundingnetwork.com.au/">https://www.thefundingnetwork.com.au/</a> (Australia)</p>
<p><b>7.8</b></p> <p>Ford Foundation, Markle Foundation, Open Society and individual donors</p>	<p>Privacy and civil liberties, privacy protection, freedom of expression and defense of democratic values in the information age</p>	<p><a href="https://epic.org/">https://epic.org/</a></p>
<p><b>7.9</b></p> <p>Adessium Foundation, Calouste Gulbenkian Foundation, Compagnia di San Paolo, European Foundation Centre, Erste Stiftung, Foundation de France, Fritt Ord, Charles Stewart Mott Foundation, Open Society, Robert Bosch Stiftung</p>	<p>A variety of agendas, depending on each fund that is created</p>	<p><a href="https://www.nef-europe.org/">https://www.nef-europe.org/</a></p>





## FINAL CONSIDERATIONS

What comes  
next?

Collaboration development and improvement in the philanthropy sector can be taken as an opportunity, a need, a limit, a strategy, a challenge, or a trend. The fact is that, in any case, collaboration is here to stay. Of all the infinite possibilities of creation revealed by the realm of collaboration, the current set of collaborative philanthropy formats can and has already been incorporated as a way of conducting philanthropy.

Though collaboration is not always the best way forward, there is a commitment to collaborative philanthropy initiatives because of their potential to mobilize more as well as new resources and to gain efficiency, scale, and impact. But, in fact, there is a gap here: studies focused on understanding how collaborative mechanisms contribute to these factors are still few in numbers. That can be an important line of development to strengthen collaborative philanthropy initiatives and more collaborative mechanisms in general.

Even so, the importance of collaboration and, therefore, the incentive for more collaborative philanthropy initiatives is constantly reaffirmed along the study, with the effort to gather a solid set of reflections, data, analyses and experiences that, in general, point in that direction. The highlights are:

- our view of the world tends to be increasingly systemic and, therefore, broader, incorporating cause and effect relations between the elements that make up the contexts in which we operate;
- most of the challenges are problems that involve complex systems and need to be analyzed as such so that solutions will emerge to address this complexity;
- there are countless reasons and gains that justify and motivate us to be more collaborative, though not everything needs to be done collaboratively. Attention must be given to the limits and risks that collaborative processes can trigger—especially regarding power concentration and lack of diversity, excluding segments of collaborative processes;
- the numbers and views of several experts and managers point out that philanthropy and PSI have advanced along the collaboration path;
- at the same time, if we are to continue moving forward, we have to incorporate many lessons learned and to overcome many challenges;

- the possibilities that collaborative philanthropy initiatives open up can be very positive for the philanthropy ecosystem, as well as for the search for solutions to the main challenges of the public agenda;
- the forms of collaborative philanthropy are potentially endless and the possibilities for creation are enormous;
- there are countless examples that can inspire us to create new initiatives.

**The infinite possibilities of creation revealed by the realm of collaboration, the current set of collaborative philanthropy formats can and has already been incorporated as a way of conducting philanthropy.**

But how to proceed? We need to be bolder and more adventurous to work together through collaborative philanthropy. And that means being open to risk and innovation, especially when it comes to exercising our creative potential and challenging it, so that we can:

- overcome the challenges and obstacles that impede or hinder collaboration;
- be inventive, purposeful and protagonists in solving problems;
- be imaginative to create new resource mobilization architectures;
- be sensitive to engage new donors.

If we start by saying that for several years there has been a thought going on within the scope of philanthropy and PSI on ways to be more efficient in the application of resources, gain more scale and act in a more complementary and aligned manner, either between philanthropic organizations/donors or with other partners and sectors, we will have to spend the next few years enhancing our experimentation with practical ways of working, and increasing our willingness to make mistakes and try again.

As indicated at the beginning, though there is a general perception that working more collaboratively and cooperatively is necessary, the idea is more ingrained in discourse than it is in practice. So let's try to keep exercising in practice. Let's take advantage of everything we already know and work to find new formats and develop the necessary tools. Let's do what we do best as humans: create our new reality guided by collaboration.

**We need to be bolder and more adventurous to work together through collaborative philanthropy.**



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The Group of Institutes, Foundations and Companies (GIFE) is a nonprofit organization that brings together members from business, family and independent philanthropy who support projects of public interest. Created in 1989 as an exchange and collaboration group, it was institutionalized in 1995 by 25 founding members. Since then GIFE has become a reference in the field of philanthropy in Brazil.

In these more than 25 years of activities, it has contributed to strengthening practices and actions at the service of the common good in the country, working to expand, qualify and strengthen the philanthropic sector, diversify and expand actors and resources, creating references and promoting good management practices, as well as articulating the sector with society and the public agenda. In 2021 GIFE brings together more than 160 members and many partners in its network.

IMPLEMENTATION



SUPPORT

