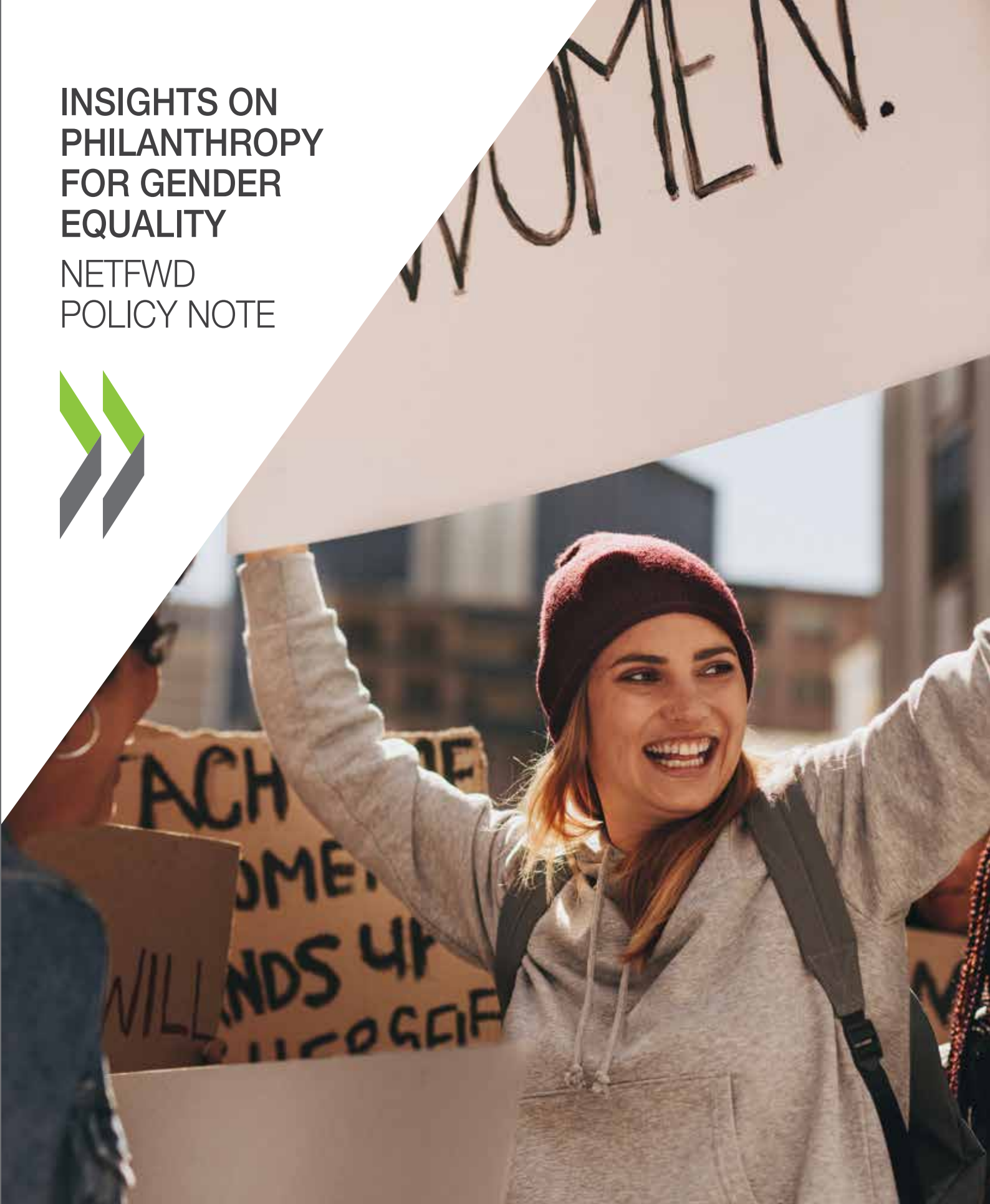


INSIGHTS ON PHILANTHROPY FOR GENDER EQUALITY

NETFWD
POLICY NOTE



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INSIGHTS ON PHILANTHROPY FOR GENDER EQUALITY

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Key findings

This policy note explores foundations' support for gender equality by providing data on philanthropic flows targeting gender equality, women and girls, as well as an analysis of foundations' funding allocations and approaches. It builds on the results of the OECD survey on Private Philanthropy for Development and insights from foundations participating in the Network of Foundations Working for Development (netFWD) Working Group on Gender, whose first meeting was held on 24 January 2018 at the OECD headquarters in Paris.

Key findings and messages include:

- Foundations' support for gender equality over 2013-15 amounted to USD 3.7 billion, representing 16% of all philanthropic flows over these three years. Yet, only a small proportion of these funds address women's specific needs, such as preventing violence against women (VAW) or supporting women's rights organisations.
- Philanthropic giving to support gender equality remains largely concentrated in a few countries – mainly India and a few other middle-income countries, especially in Africa – and sectors, mainly health and reproductive health and education. Support for gender equality in lower-income and fragile/conflict-affected countries, as well as in the economic and productive sectors, is more limited.
- Most philanthropic giving for gender equality is earmarked and channelled through well-established non-governmental organisations (NGOs) and multilateral institutions. Foundations' engagement with partners or programmes tends to be short-term in nature and they favour working their peers and the public sector (i.e. governments or official development institutions).
- Across the philanthropic sector, foundations tend to be investing their funds along two major tracks: “gap-filling philanthropy” and “impact-at-scale philanthropy”.
- Foundations' allocation decisions vary from one foundation to the next. Overall, foundations supporting gender are more inclined towards a partnership and impact-at-scale approach, rather than a gap-filling or pilot-oriented approach. Yet, many foundations favour a combination of both of these approaches.
- Foundations working on gender are increasingly exploring new solutions and financial tools, and providing longer-term and non-financial support. Yet, these practices are still not the norm and priorities in terms of implementing partners, and country and sectoral allocations, show less innovative patterns.
- Main foundations working on gender carry out rigorous evaluations of their programmes, and often claim alignment with the Sustainable Development Goals and interest in engaging with national governments. Yet, few foundations measure their own institutional performance and, according to their sectoral allocation at the country level, alignment with national development strategies is limited.
- Regardless of the foundations' allocation approach, there remain important entry points to further optimise philanthropic giving for gender, including increasing the availability of data, evaluating impact and sharing lessons, conducting needs assessments, testing new solutions and funding instruments, further supporting the frontline and enhancing collaboration.

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ABBREVIATIONS AND ACRONYMS

AWIF	Asia Women Impact Fund
BMGF	Bill and Melinda Gates Foundation
CIFF	Children’s Investment Fund Foundation
DAC	Development Assistance Committee
DCD	Development Co-operation Directorate
DRC	Democratic Republic of the Congo
FGM/C	Female genital mutilation/cutting
FHI	Family Health International
GLI	Gender-lens investing
GWO	Grassroots women’s organisations
HNWI	High net worth Individuals
INGO	International non-governmental organisation
IPPF	International Planned Parenthood Federation
KPI	Key performance indicator
LDC	Least developed country
LIC	Low-income country
LMIC	Lower middle-income country
M&E	Monitoring and evaluation
MMR	Maternal mortality rate
MRI	Mission-related investment
MSI	Marie Stope International
netFWD	Network of Foundations Working for Development
NGO	Non-governmental organisation
ODA	Official development assistance
OECD	Organisation for Economic Co-operation and Development
PPP	Public-private partnership
PSI	Population Services International
SDG	Sustainable Development Goal
SIGI	Social Institutions and Gender Index
SII	Social impact investment
STBF	Susan Thompson Buffet Foundation

STD	Sexually transmitted diseases
UMIC	Upper middle-income country
UN	United Nations
UNICEF	United Nations International Children’s Emergency Fund
UPL	United Postcode Lotteries
VAW	Violence against women
VfM	Value for money

1. WHY THIS POLICY NOTE?

Since the adoption in 2015 of the Agenda 2030 for Sustainable Development and the Sustainable Development Goals (SDGs), gender equality and women's empowerment has become a real promise. It is not only a stand-alone goal through SDG5: "Achieve gender equality and empower all women and girls" (UN General Assembly, 2015), but also is an intrinsic part of all the dimensions of the sustainable development agenda. As a result, promoting gender equality and empowering women has gained traction in the development agenda and has expanded to cover topics beyond education and employment, such as violence against women (VAW) and early marriage. While there has been progress in ending discrimination against women through legal measures, change remains slow when it comes to addressing the root causes that prevent women and girls to achieving their full potential and exercise their rights. For instance, 48 countries still lack laws protecting women from domestic violence and 29 do not grant widows and daughters equal inheritance rights as their male counterparts (OECD, 2019). Furthermore only 52% of women globally who are married or in a relationship freely make their own decisions about sexual relations, contraceptive use and health care (UN Women, 2018), and only 24% of parliamentary seats are held by women (OECD, 2019). This is exacerbated by budgetary and political restrictions, with only 13% of countries dedicating a specific budget to gender statistics (UN Women, n.d.). Advancing gender equality and women's rights is an immensely challenging task and requires whole-of-society commitments to ensure effective implementation, both through laws as well as through a change in social norms.

In this context, private philanthropic giving for gender equality in developing countries has been on the rise. Throughout this note, philanthropic flows targeting gender equality are defined as "all activities allocated in the population policies/programmes and reproductive health, except STD control, including HIV/AIDS; support to women's equality organisations and institutions; ending violence against women and girls and all other activities, explicitly targeting women, girls, brides" (OECD, 2018a). Some foundations are entirely focused on women and girls and have made it their core mission to achieve gender equality. Others are increasingly acknowledging the importance of weaving gender issues into their existing programming, while recognising that gender equality is indispensable to achieving development across all dimensions. For example, the Bill and Melinda Gates Foundation's (BMGF) approach to transforming agriculture is premised upon greater investments in gender equality (Austin, 2018). Given this increased interest and ambition within the philanthropic sector working with developing countries, the OECD Network of Foundations Working for Development (netFWD) launched its Gender Working Group in January 2018. Its aim is to create a community of peer learning and collaboration of philanthropists working on gender, and to collectively develop knowledge products such as this policy note.

However, little is known about philanthropic funding, and gender is no exception. In order to address the lack of data and information on philanthropic giving, in 2016 the OECD Development Co-operation Directorate (DCD), in co-operation with the OECD Development Centre's netFWD, launched a large-scale survey of global private philanthropy for development¹ (OECD, 2018b, 2018d). It collected activity level data from the 147 largest philanthropic foundations worldwide working for development over 2013-15 (see Annex A for more details on methodology). The OECD report "Private Philanthropy for Development" (OECD, 2018a) presented the key findings from the survey and was a first step in identifying where philanthropic funding to developing countries goes to, and in analysing the patterns and features of these forms of giving.

¹ The term "private philanthropic flows for development" refers to transactions from the private sector that promote the economic development and welfare of developing countries as their main objective, and which originate from foundations' own sources (OECD, 2018a).

However, there are some limitations in the data collected through the OECD survey (2018b, 2018c). It is likely that the amounts spent in support of philanthropy for gender equality may have been under-estimated. Indeed, many foundations participating in the survey did not fully share their data or only answered either the quantitative or the qualitative questionnaires. In addition, the survey only covered the largest foundations working in developing countries and does not capture some smaller to medium-size foundations, nor the family offices or High Net Worth Individuals (HNWI). Furthermore, the OECD classification of philanthropic flows targeting gender-related projects or programmes was inferred from the description of each activity, rather than reported directly by foundations. In contrast, when it comes to measuring official development assistance (ODA), donor countries report whether each of their projects target gender equality as a policy objective using a specific “marker”. While for both categories of donors (i.e. philanthropists and official development co-operation agencies) the survey method allows for an approximate quantification of flows that target gender equality, there remains no standardised methodology to consistently classify gender-related flows.

Against this background, member foundations of the netFWD Gender Working Group agreed to further share and analyse data on philanthropic funding for development with a specific focus on gender. This policy note therefore draws on the 2013-15 survey results to further unpack foundations’ engagement in support of gender issues, while providing new data on philanthropic giving for gender equality which was collected in 2017. The note also offers insights and analysis on foundations’ funding allocations: patterns, overlaps with ODA, and opportunities for partnering. It ends with recommendations for foundations on how to enhance the effectiveness of philanthropic giving for gender.

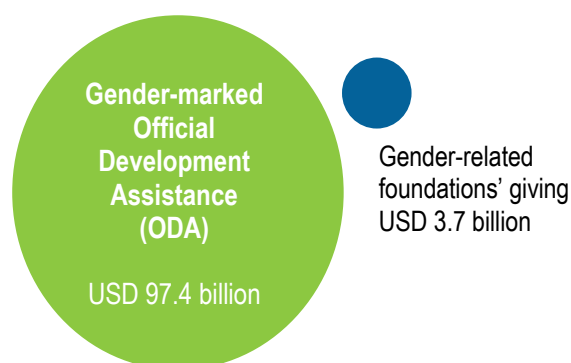
2. WHAT DO WE KNOW ABOUT PHILANTHROPIC FUNDING FOR GENDER?

This section presents information on foundations' support to gender equality, drawing on the quantitative and qualitative data collected by the OECD Survey on *Private Philanthropy for Development* (2018b, 2018c). It provides evidence on the distribution of gender-related philanthropic flows by funders, recipients and sectors, as well as on how foundations supporting gender equality engage specifically in the field.

2.1. Philanthropic flows for gender equality are on the increase but still relatively modest when compared to ODA

According to the OECD survey of *Private Philanthropy for Development* (2018b), **foundations included in the survey provided a total of USD 3.7 billion to support gender equality in developing countries² from 2013 to 2015.** Over 2013-15 philanthropic giving for gender equality was on the rise, from USD 1.1 billion in 2013 and 2014 to USD 1.5 billion in 2015. This is equivalent to 16% of the three-year total of philanthropic giving identified for this period and roughly 4% of gender-marked ODA (see Figure 2.1 and Box 2.1).

Figure 2.1. Foundations' giving for gender equality and ODA gender-marked
USD billion (2013-15)



* Includes resources targeting gender equality as a “principal objective” and a “significant objective”.

Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Box 2.1. Allocation of bilateral ODA to gender equality and women's empowerment, 2013-15

Total bilateral ODA flows from Development Assistance Committee (DAC) countries reported as targeting gender equality and women's empowerment, either as a significant or a principal objective, amounted to USD 97.4 billion over 2013-15, i.e. 33% of total bilateral aid during the period. This figure is based on commitments at 2015 constant prices and excludes non-sector allocable aid since several DAC members do not apply the gender equality marker on these forms of aid.

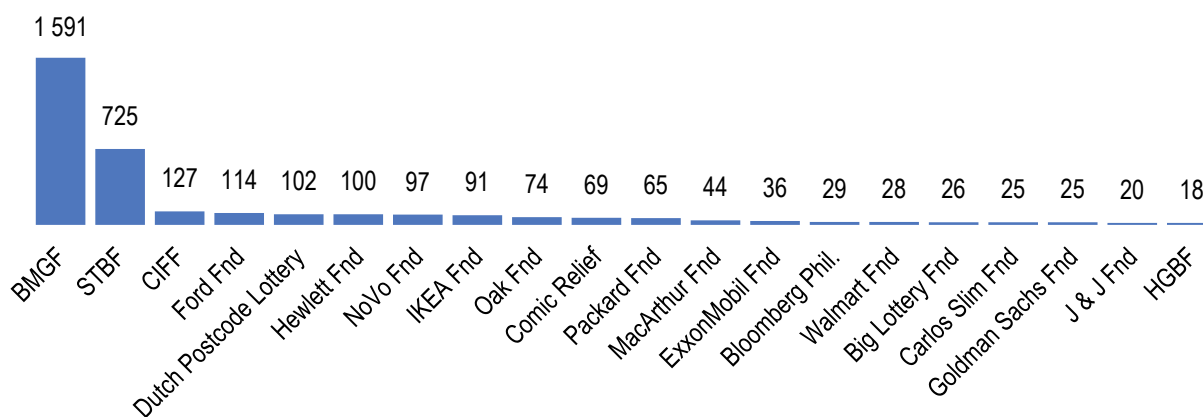
² The term “developing countries” refers to all countries and territories on the DAC List of ODA Recipients and consists of all low- and middle-income countries based on gross national income per capita as published by the World Bank, with the exception of G8 members, European Union members, and countries with a firm date of entry into the EU. The list also includes all of the least developed countries as defined by the United Nations (UN) (OECD, 2018a).

Trends in ODA flows targeting gender equality and women’s empowerment over 2013-15 show that amounts allocated have been consistently growing. In 2015, there was a sharp increase with gender-targeted aid reaching USD 39.3 billion and representing 38% of total ODA flows, an 8% more compared to previous years.

Source: OECD (2018c), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>.

Of the 143 foundations included in the data questionnaire (OECD, 2018b), 48 reported that they provided over USD 1 million in the 2013-15 period, with 22 each providing over USD 10 million. As shown in Figure 2.2, funding from the Bill and Melinda Gates Foundation (BMGF) accounted for almost half of total gender-related giving (USD 1.6 billion; 43%), followed by the Susan Thompson Buffet Foundation (STBF) (USD 725 million; 19%). Other foundations that gave significant funding to support women and girls were the Children’s Investment Fund Foundation (CIFF) (USD 127 million), Ford Foundation (USD 114 million), the Dutch Postcode Lottery (USD 102 million) and the Hewlett Foundation (USD 100 million), representing approximately 3% each.

Figure 2.2. Who are the main foundations supporting gender equality?
USD million (2013-15)

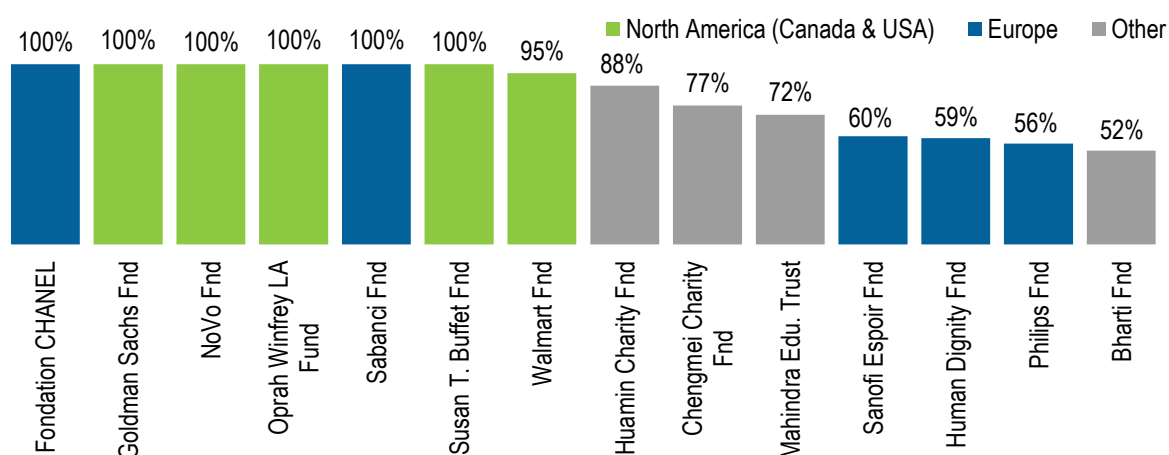


Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Looking at the share of foundations’ giving dedicated to supporting women and girls reveals that the following seven foundations specialise exclusively on gender (i.e. those whose support to gender equality constitutes more than 90% of their portfolio), all of them based in North America³ and Europe: Fondation CHANEL, Goldman Sachs Foundation, NoVo Foundation, Oprah Winfrey Leadership Academy Foundation, Sabanci Foundation, STBF and Walmart Foundation (Figure 2.3).

³ For the purpose of this note, North America includes Canada and the United States.

Figure 2.3. Which foundations are most focused on gender equality?
% of foundation's total giving (2013-15)

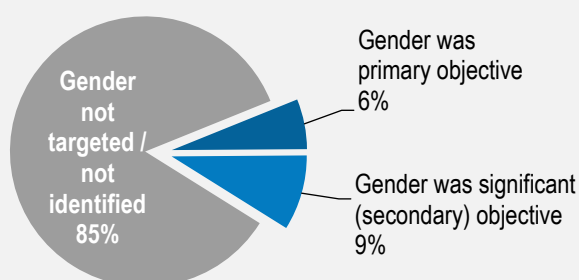


Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Box 2.2. Philanthropy for gender equality update: Analysis of flows from 2017

The OECD data collection efforts on private philanthropy have allowed expanding the statistical data-sharing partnerships with foundations regularly reporting to the OECD Creditor Reporting System. As of 2017, 26 foundations now disclose activity-level data, which are accessible from the OECD.stat website.

Figure 2.4. Share of private philanthropy targeting gender equality in 2017

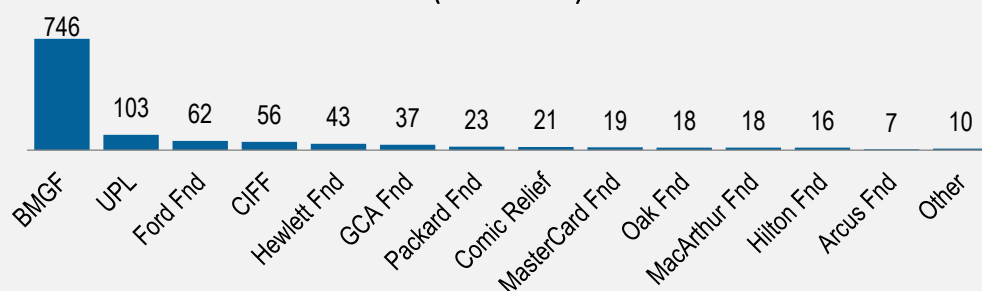


Source: OECD (2019), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>.

The new data on private philanthropy for development shows that **in 2017, 15% of philanthropic funding from 26 of the largest foundations worldwide had the objective of supporting gender equality and women's empowerment, which amounts to USD 0.9 billion for that year.** In addition, 6% of philanthropic giving was identified as having gender equality as a primary objective and another 9% as having gender equality as a secondary objective (Figure 2.4). Nevertheless, 85% of all philanthropic flows identified in the recent 2017 survey update were not targeted or identified as addressing objectives of gender equality, which highlights **the need to better understand how philanthropic flows address gender quality.**

As identified by a marker through a keyword search, the BMGF contributed USD 0.75 billion, followed by the United Postcode Lotteries (UPL) with USD 103 million – which include the lotteries of the Netherlands, Sweden and the United Kingdom – and the Ford Foundation with USD 62 million (Figure 2.5).

Figure 2.5. Top foundations supporting gender equality* gross disbursements in 2017 (USD million)



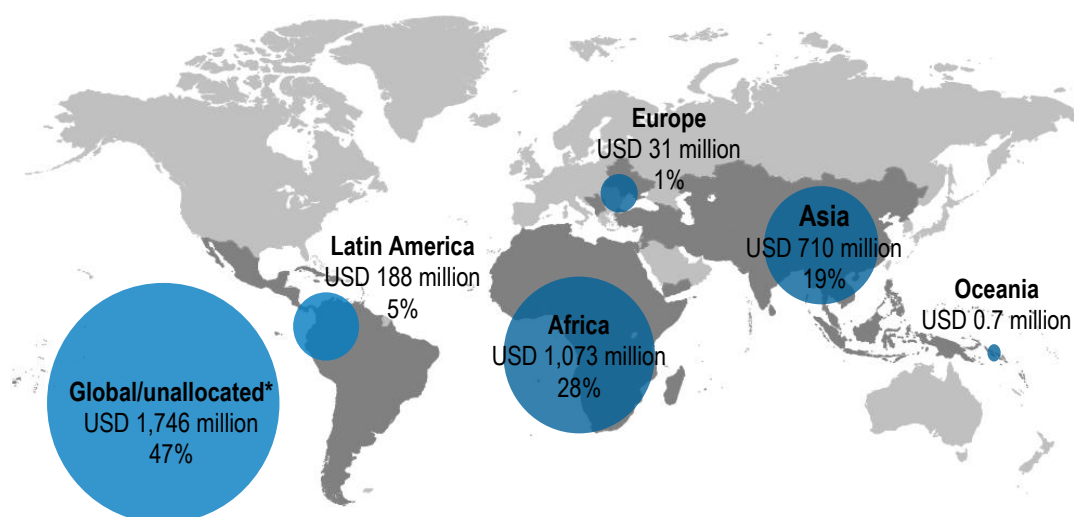
*In the case of BMGF, marking on gender was made based on a keyword search of grants.

Source: OECD (2019), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>.

2.2. Africa and Asia receive the largest share of philanthropic giving for gender equality

Over 2013-15, **28% of the total giving for gender targeted Africa**, followed by Asia (19%), America (5%) and Europe (1%), while almost half of philanthropic giving (47%) had a global or unallocated scope (see Figure 2.6).

Figure 2.6. Geographic distribution of giving for gender equality, 2013-15



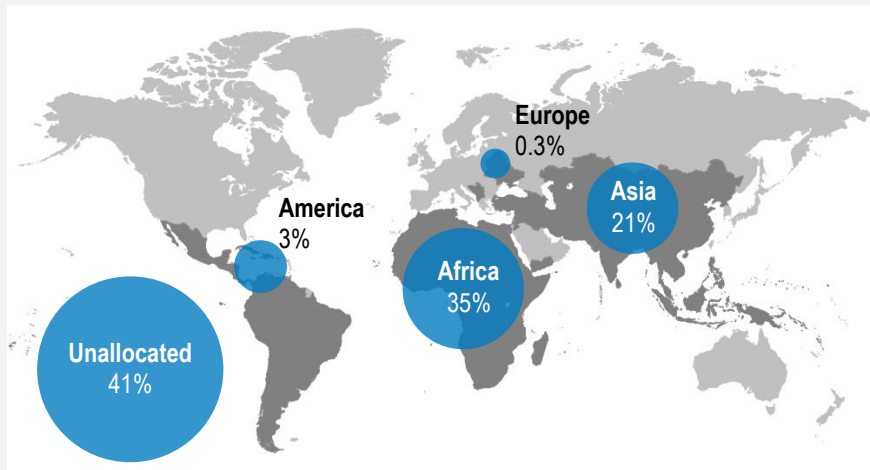
* Includes activities addressing global challenges and core funding to NGOs and multilateral organisations.

Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Box 2.3. Philanthropy for gender equality update: Geographical allocation in 2017

Philanthropic flows targeting gender equality reported for 2017 follow largely the same trends in terms of targeted sectors as those captured in the OECD survey (2018b) for the 2013-15 period (see Figure 2.6). Most of the philanthropic giving for gender equality was also allocated to countries in Africa and Asia (Figure 2.7).

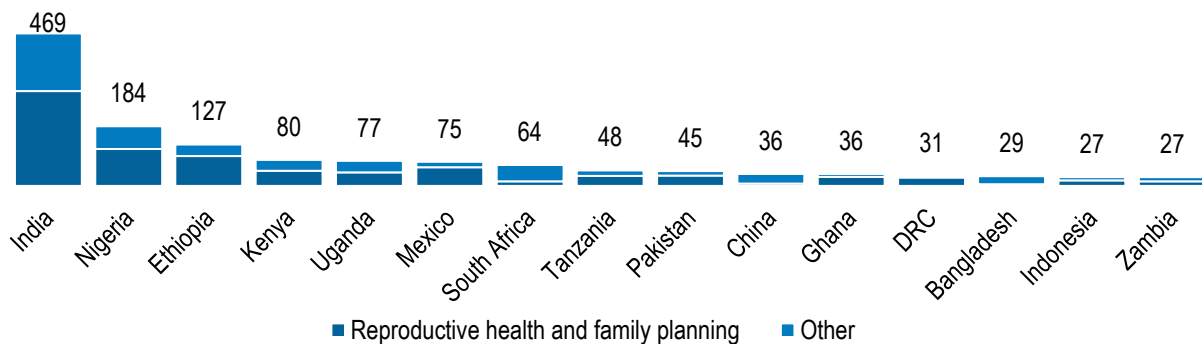
Figure 2.7. Gender-related philanthropy by geographic region, 2017



Source: OECD (2019), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>.

In line with the geographic distribution, **five of the top ten recipient countries were from the African continent: Ethiopia, Ghana, Kenya, Nigeria and Uganda** (see Figure 2.8). However, **India was by far the largest beneficiary of gender-related giving** (USD 467 million), being also the largest recipient of international philanthropic flows overall. This was mainly a result of significant giving by the BMGF (USD 284 million) who gave 61% of the country-allocated total for gender equality, particularly for reproductive health and family planning (USD 203 million).

Figure 2.8. Top 15 beneficiary countries of gender-related giving, 2013-15
USD million

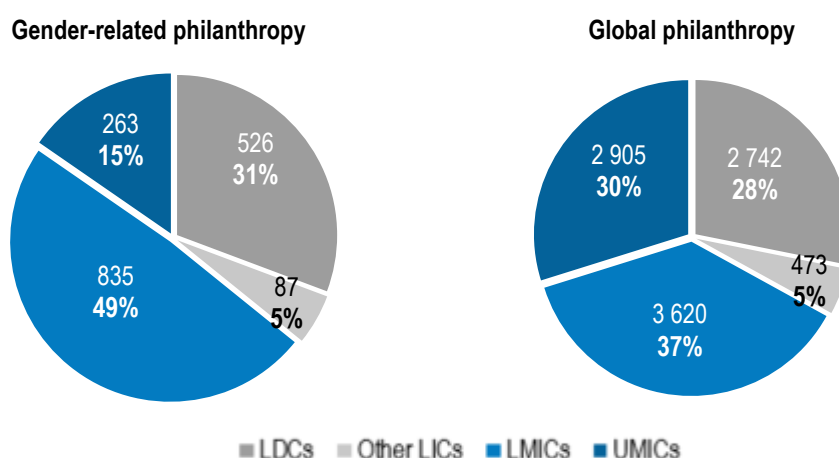


Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Whilst in most countries the reproductive health and family planning sector absorbed at least half of the country-allocated philanthropic funding for gender equality (see Figure 2.8), in certain countries other sectors were also heavily funded. For example, in South Africa, 48% of gender related funds targeted education; People's Republic of China (hereafter 'China') saw 27% go to education projects and 23% to employment policy and administrative management activities; while in Bangladesh 42% were allocated to health, particularly basic nutrition.

In terms of income group, **most of the country-allocable gender-related giving was directed towards middle-income countries** (64%). In particular, almost half (49%) of foundations' giving went to lower middle-income countries (LMICs) and only 15% to upper middle-income countries (UMICs). Surprisingly, only 31% targeted the least developed countries (LDCs) and 5% other low-income countries (LICs). This trend is similar to that of the global philanthropy survey (OECD, 2018a), although the former targeted slightly more LMICs countries rather than UMICs (see Figure 2.9).

Figure 2.9. Philanthropic giving by income groups, 2013-15
USD million

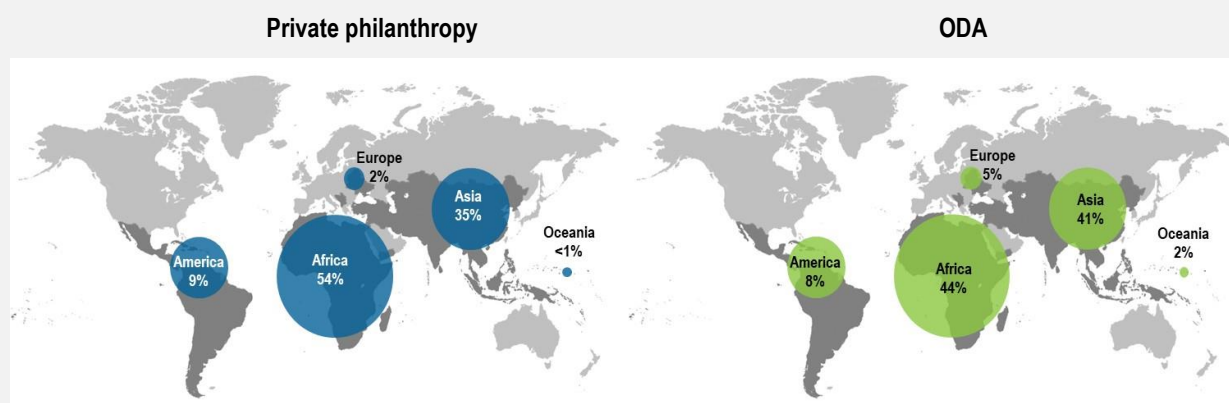


Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Box 2.4. How does the geographical allocation of gender-targeted ODA and philanthropic giving compare?

Over 2013-15 Africa was the main beneficiary region of both gender-targeted ODA and philanthropic giving, followed by Asia. However, philanthropy was more concentrated in the African continent (54% of the region-allocable philanthropic giving), while ODA flows were more evenly distributed between Africa (44% of region-allocable ODA flows) and Asia (41%) (Figure 2.10). In relative terms, support for Latin America was similar among the two categories of funders, but a larger share of ODA flows was allocated to Europe and Oceania than philanthropic flows.

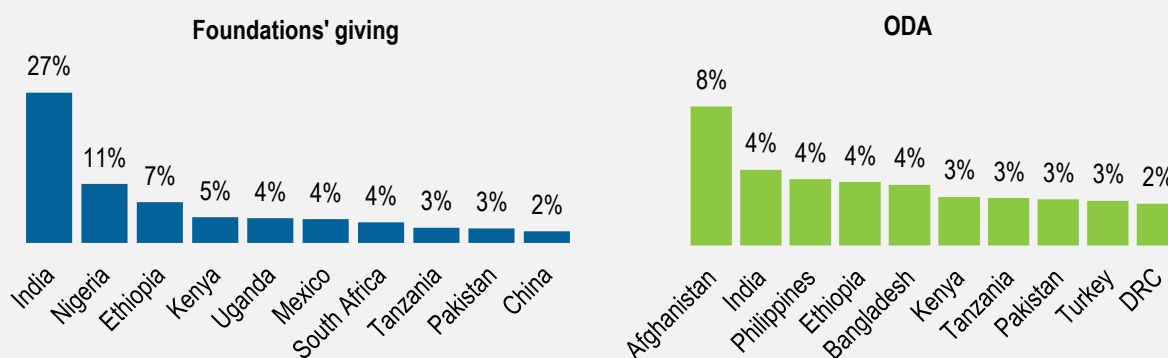
Figure 2.10. ODA and philanthropic giving by region, 2013-15
Percentage of respective region-allocable total



Sources: OECD (2018c), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>; OECD (2018b) *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

In terms of recipient countries (Figure 2.11), donor governments and foundations seem to have different priorities when allocating gender-related funds. While countries like India, Ethiopia and Kenya were among the main recipients of both ODA and philanthropic giving for gender, there were also significant differences in how foundations and donors select beneficiary countries. For instance, the first recipient of ODA for gender was Afghanistan, whereas it receives only 0.2% of foundations' giving for gender. Similarly, although India is among the main beneficiary countries for both types of funder, philanthropic giving for gender is significantly more concentrated in this country (27% of country-allocable giving) than ODA (second beneficiary country, but representing only 4% of commitments). Furthermore, although countries like the Philippines and Turkey were among the main beneficiaries of ODA for gender, the OECD survey results showed these were not among the top recipients of philanthropic giving for gender, and that foundations focused more on other countries like Nigeria (11%), Mexico (4%), South Africa (4%) and China (2%).

Figure 2.11. Top 10 recipient countries for gender-related ODA and philanthropic giving
(of country-allocable totals, 2013-15)



Sources: OECD (2018c), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>; OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Finally, ODA for gender was less concentrated on middle-income countries (46% of country-allocable flows) than foundations' gender-related giving (64%), and it was also targeted more broadly to lower-income countries. While funds directed to UMICs (14%) and other LICs (4%) were largely similar among the 2 funders' categories, almost half of ODA flows (49%) supported LDCs, with a smaller share (32%) going to LMICs. For foundations' giving, the share was 31% for the former and 49% for the latter (Figure 2.9).

Note: Figures on ODA flows in this box refer to 2013-15 commitments in constant 2015 prices and include only sectoral-allocable ODA flows from DAC countries.

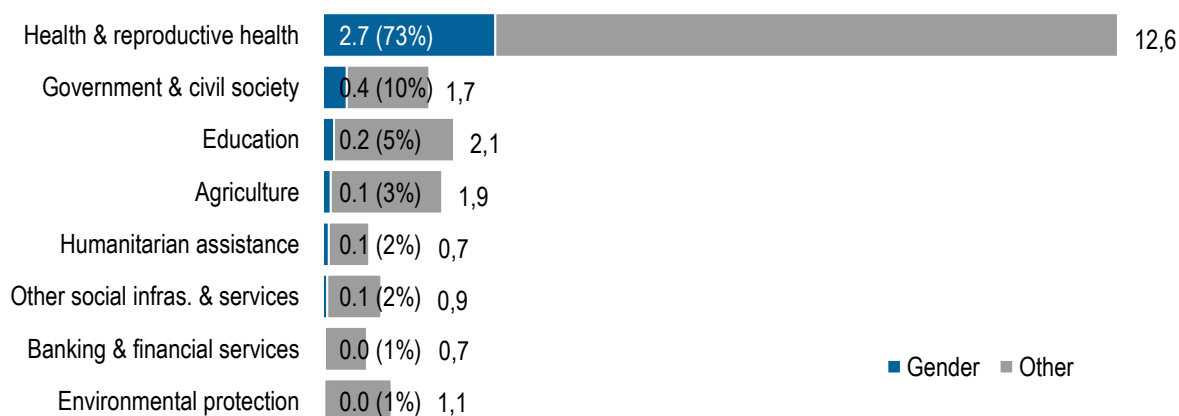
2.3. Health and reproductive health is the main sector targeted by philanthropic giving for gender equality

Health and reproductive health⁴ was the largest sector (73%) to benefit from gender-targeted philanthropic giving, which was also in line with the allocations seen in philanthropic giving overall (Figure 2.12). In particular, USD 2.3 billion (60% of all giving for gender equality) was dedicated to reproductive health, family planning, population policies and STD control. This was mainly due to the significant donations to this sector by BMGF, as well as by other large foundations like STBF and CIFF. Other important sub-sectors included infectious diseases control (6%) and basic nutrition (4%).

Government and civil society⁵ was the second most targeted sector (10%), with activities focused on human rights, democratic participation and civil society development or conflict prevention and resolution. Support to this sector was more significant for philanthropy in support for gender equality than for global philanthropy for development as a whole, mainly due to giving to support to women’s equality organisations (3%) and to ending violence against women and girls, including female genital mutilation/cutting (FGM/C) (3%).

Other significant sectors included education (5%) and agriculture (3%). On the other hand, gender-related funding in some sectors, such as environmental protection or banking and financial services, was found to be very limited (1% each).

Figure 2.12. Main sectors targeted by gender-related funding, 2013-15
USD billion



Source: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

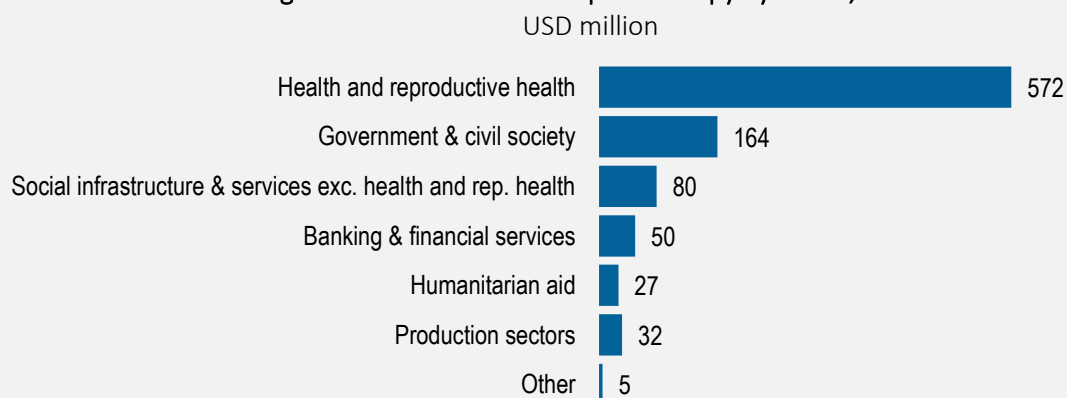
Box 2.5. Philanthropy for gender equality update: Sectoral distribution in 2017

⁴ Health and reproductive health sector includes two codes in the DAC sector classification: health and population policies/programmes and reproductive health – see Annex A for more information on the OECD sector coding.

⁵ I.e. activities aimed at strengthening the administrative apparatus and government - see Annex A for more information on the OECD sector coding.

In line with the sector distribution of philanthropic flows for gender equality observed for the 2013-15 period (see Figure 2.12), most gender-related flows from 2017 were allocated in the health and reproductive health sectors, which together accrue USD 572 million, followed by government and civil society with USD 164 million (Figure 2.13).

Figure 2.13. Gender-related philanthropy by sector, 2017



Source: OECD (2019), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>

It is important to note that these sectoral allocation results might be biased due to difficulties involved in classifying gender-related flows. For instance, it is easier to identify projects related to reproductive health and family planning as specifically targeting women and girls, than programmes on economic infrastructure and services. Yet, programmes on water infrastructure and clean energy for example, have a significant, although not as evident, impact on women's lives and are closely related to gender equality and women's empowerment.

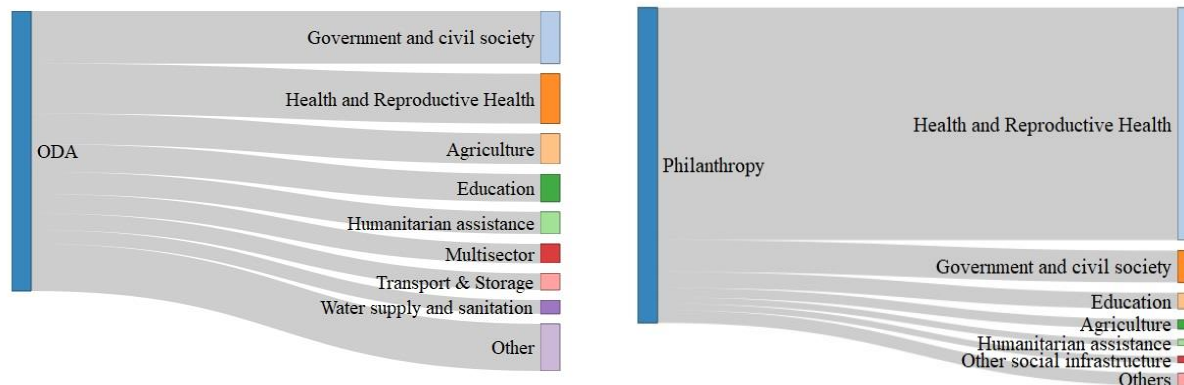
Box 2.6. How does the sectoral distribution of gender-targeted ODA and philanthropic giving compare?

When looking at the sectoral distribution of funds, there are differences between foundations' allocation choices and those of ODA donors (Figure 2.14). Health and reproductive health, government and civil society, education and agriculture were the most targeted sectors for both ODA and philanthropic giving for gender, but the share of support given to each sector varied considerably.

Foundations' efforts were heavily concentrated on health and reproductive health (73% of foundations' giving for gender equality), providing a share of their support four times bigger than that of ODA (18% of aid targeting gender equality).

ODA donors' support was more equally distributed among the four main sectors, together with a larger spectrum of issues like water and sanitation or energy. ODA providers also gave broader financial support to humanitarian assistance targeting women and girls (8% of all aid targeting gender), making ODA's share four times higher than that of foundations (2% of total gender-related philanthropic giving).

Figure 2.14. Sectoral allocation of ODA and foundations' giving for gender equality, 2013-15



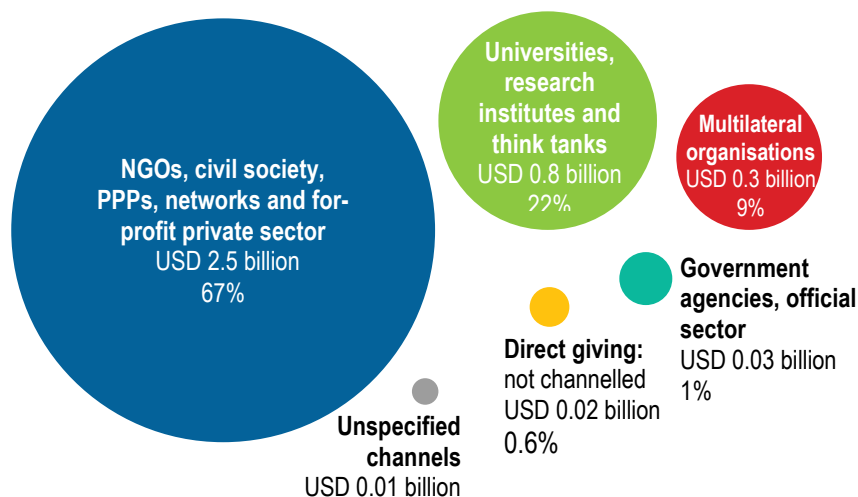
Note: Figures on ODA flows in this box refer to 2013-15 commitments in constant 2015 prices and include only sectoral-allocable ODA flows from DAC countries.

Sources: OECD (2018c), *OECD International Development Statistics: Creditor Reporting System* (database), www.oecd.org/dac/stats/idsonline.html; OECD (2018b) *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

2.4. Foundations invest in gender equality through well-known international NGOs and universities

Almost all philanthropic giving for gender equality (99%) was allocated to intermediary institutions, with less than 1% being directly executed by foundations themselves (Figure 2.15).

Figure 2.15. Main channels of delivery⁶ of philanthropic giving for gender equality, 2013-15



Note: NGOs, civil society, PPPs, networks and the for-profit private sector are grouped together since, given the high number of channels that were stated in responses to the survey, it was not feasible to distinguish which channelling organisations had a not-for-profit or for-profit business model or, for example, to what extent they could qualify as PPPs or networks (OECD, 2018a).

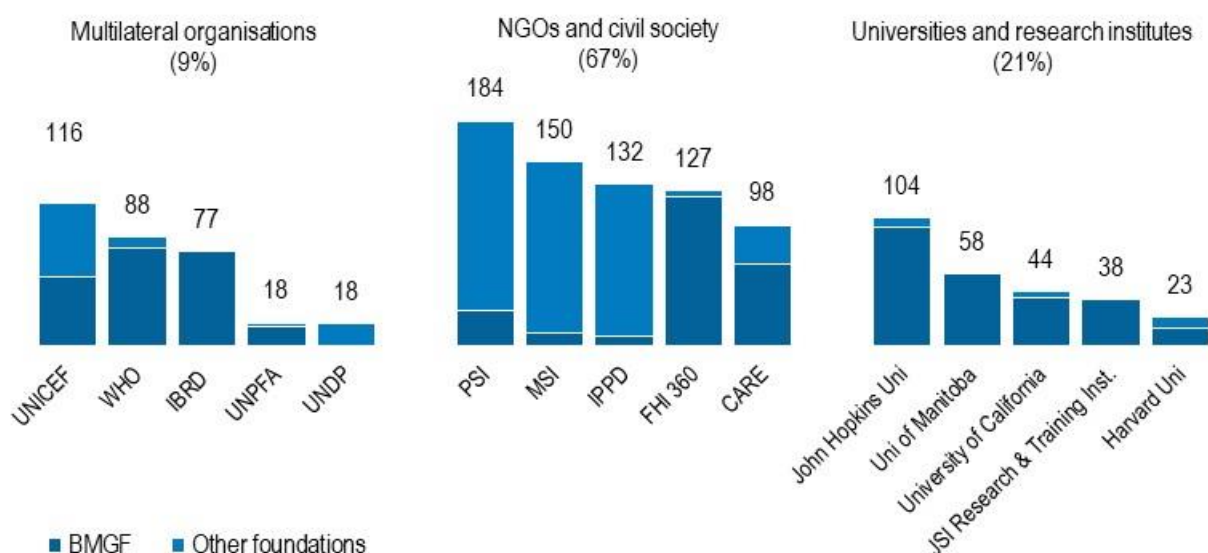
Source: OECD (2018b) *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*,

⁶ Channels of delivery refer to the first implementing partner of foundations' giving. It is the entity that has implementing responsibility over the funds and is normally linked to the extending agency by a contract or other binding agreement, and is directly accountable to it. See also paragraph 164 of [http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DCDDAC\(2016\)3FINAL.pdf](http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DCDDAC(2016)3FINAL.pdf) (OECD, 2018a).

Foundations mainly channel their giving for gender equality through NGOs, civil society, public-private partnerships (PPPs), networks and the for-profit private sector (67% of total gender-related giving). This was followed by university, college or other teaching institutions, research institutes and think-tanks⁷ (21%); and finally, multilateral organisations (9%).

The main institutional beneficiaries of philanthropic giving for gender equality (see Figure 2.16) were Population Services International (PSI) (USD 184 million), Marie Stopes International (MSI) (USD 150 million), the International Planned Parenthood Federation (IPPF) (USD 132 million), Family Health International (FHI 360) (USD 127 million) and the United Nations Children’s Fund (UNICEF) (USD 116 million). The predominance of organisations working on reproductive health mirrors the survey results on sectoral allocation.

Figure 2.16. Main institutional beneficiaries of giving for gender equality, 2013-15 USD million

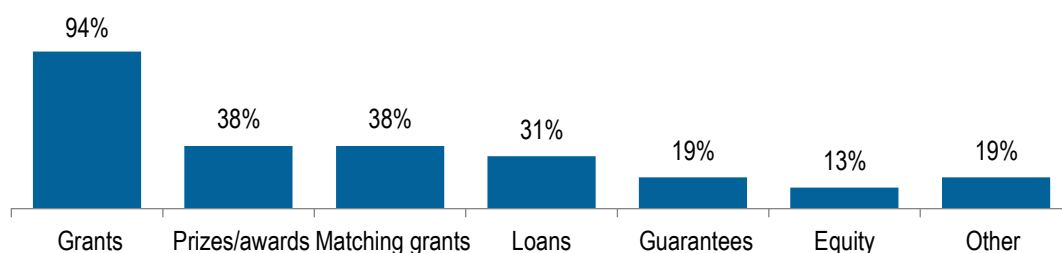


Source: OECD (2018b) *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Grants are the preferred instrument used by most gender-related foundations to allocate their funds, with 94% of them providing grants and 38% providing prizes and awards and matching grants (see Figure 2.17). However, some foundations are increasingly considering new financial tools as an alternative to traditional grant making. For instance, 31% provide loans, 19% use guarantees and 13% equity, although these remain limited in terms of volume.

Figure 2.17. What type of instruments do the main foundations working on gender use to allocate funds?

⁷ This category consists of organisations which include “institute”, “centre”, “analysis”, “analytical” or “research” in their title (OECD, 2018a).

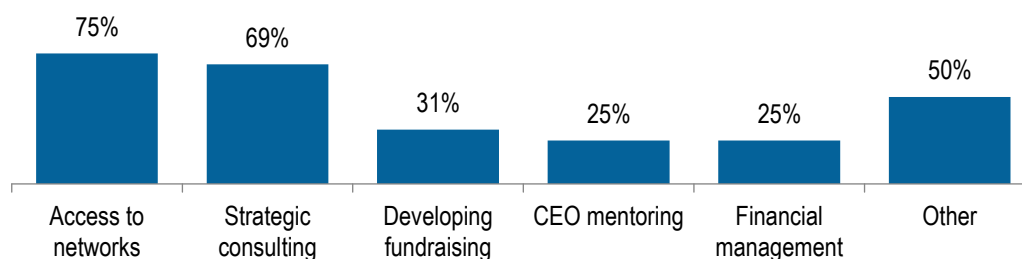


Note: The sample used for this graph consists of the top foundations in terms of the amount of flows provided targeting gender equality (16 out of the 84 foundations who responded to the qualitative questionnaire).

Source: OECD (2018d) *Survey on Private Philanthropy for Development 2013-15: Qualitative Questionnaire*, www.oecd.org/site/netfwd.

In addition to financial support, foundations also provide non-financial support to grantees. The majority (75%) of the main foundations working on gender provide grantees with access to networks, 69% offer strategic consulting and 31% help them to fundraise and develop revenue strategies (Figure 2.18).

Figure 2.18. What types of non-financial support are provided by the main foundations working on gender?

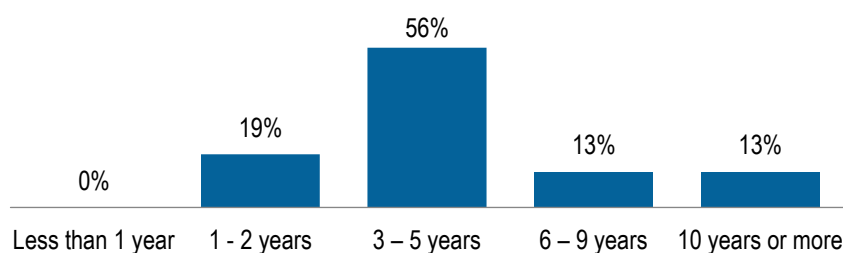


Note: The sample used for this graph consists of the top foundations in terms of the amount of flows provided targeting gender equality (16 out of the 84 foundations who responded to the qualitative questionnaire).

Source: OECD (2018d) *Survey on Private Philanthropy for Development 2013-15: Qualitative Questionnaire*, www.oecd.org/site/netfwd.

The engagement period over which funding or support is provided tends to be relatively short. **Long-term commitments are quite rare.** The qualitative survey reveals that 75% of the main foundations working on gender support initiatives and/or partners for no longer than 5 years (see Figure 2.19). This, however, is longer than the average for philanthropy for development in general, where 86% of foundations engage for 5 years or less (OECD 2018a).

Figure 2.19. How long do the main foundations working on gender tend to engage?



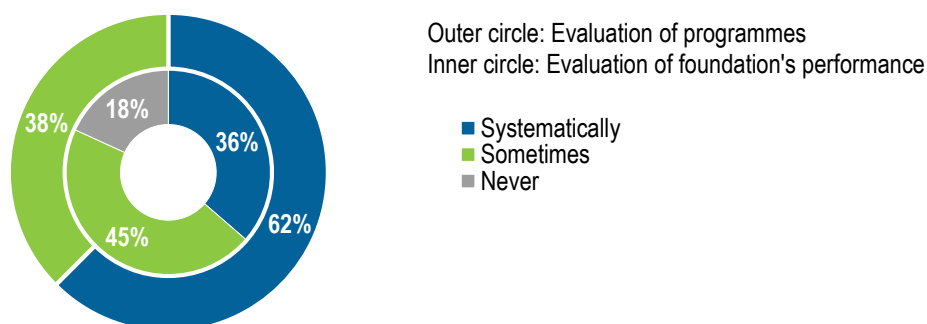
Note: The sample used for this graph consists of the top foundations in terms of the amount of flows provided targeting gender equality (16 out of the 84 foundations who responded to the qualitative questionnaire).

Source: OECD (2018d) *Survey on Private Philanthropy for Development 2013-15: Qualitative Questionnaire*, www.oecd.org/site/netfwd.

All surveyed foundations working on gender report evaluating their programmes – with almost two-thirds doing it “systematically” and over one-third “sometimes” (see Figure 2.20). However, figures are much lower when it comes to evaluating their performance as foundations. The OECD survey reveals that 13% of the main foundations working on gender never measure their institutional performance, while only 36% do it “sometimes” and 45% do it “systematically”.

Nevertheless, results suggest that evaluations of programmes and institutional performance are more regularly carried out by foundations supporting gender equality, women and girls than on average for the foundations reviewed in the global OECD survey.

Figure 2.20. How often do the main foundations working on gender evaluate their performance?

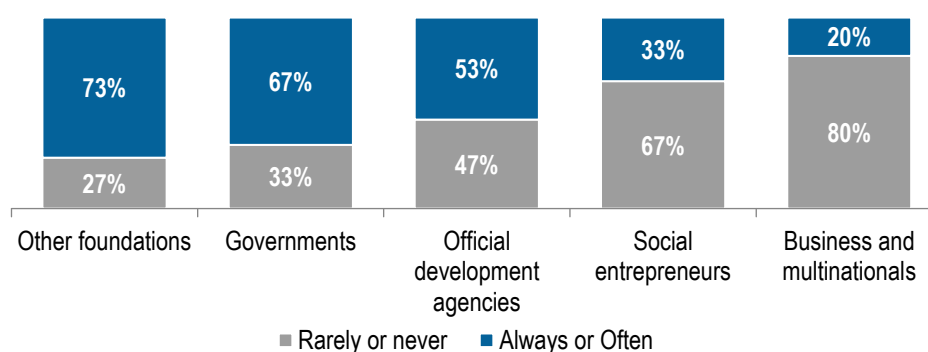


Note: The sample used for this graph consists of the top foundations in terms of the amount of flows provided targeting gender equality (16 out of the 84 foundations who responded to the qualitative questionnaire).

Source: OECD (2018d), *Survey on Private Philanthropy for Development 2013-15: Qualitative Questionnaire*, www.oecd.org/site/netfwd.

Finally, foundations working on gender favour working through partnerships and coalitions; indeed, they often consider engaging with other actors in the design and implementation of their projects. Their preferred partners are other foundations and governments in developing countries, at 74% and 67% respectively (Figure 2.21). In addition, foundations working on gender also have considerable interest in partnering with official development agencies (53%) – a higher rate than for all foundations from the global OECD survey (45%). Yet, they are less inclined to work with social entrepreneurs (33%) than the global average (61%). Overall, the OECD survey results show a preference for these foundations to work with public actors rather than social entrepreneurs, businesses and multinational enterprises.

Figure 2.21. Which actors do the main foundations working on gender prefer to partner with?



Note: The sample used for this graph consists of the top foundations in terms of the amount of flows provided targeting gender equality (16 out of the 84 foundations who responded to the qualitative questionnaire).

Source: OECD (2018d), *Survey on Private Philanthropy for Development 2013-15: Qualitative Questionnaire*, www.oecd.org/site/netfwd.

Yet, in spite of these encouraging trends towards partnerships and impact-oriented philanthropy, the philanthropic sector remains significantly fragmented, with foundations supporting gender equality operating in different ways and with different goals. Differences in funding allocation approaches depend on their mandates, missions, their own “theories of change” or the constraints faced in the countries in which they operate.

Thus, the following section explores how foundations, in spite of their diversity, are allocating funds, from a “gap-filling” or “pilot-oriented” approach to a partnership and “impact at scale” one. Based on the evidence analysed, the note offers insights on how allocations could be made even more effective taking these approaches into account.

3. HOW TO MAKE PHILANTHROPIC GIVING FOR GENDER MORE EFFECTIVE?

Given that philanthropy for gender towards developing countries is on the rise, both in terms of the attention given to gender-related issues and in terms of funding, foundations are increasingly looking to identify the most effective way of allocating funding to advance gender equality and women's empowerment. It is not just about giving more money, but about being smart in where and how to give to drive social change.

Across the philanthropic sector, foundations have been channelling their funds along two major tracks, referred to in this note as “gap-filling philanthropy” and “impact at scale philanthropy”. Gap-filling philanthropy is premised upon the idea that foundations have a comparative advantage when it comes to innovating, plugging gaps, and addressing the unmet needs of women and girls. On the other hand, impact at scale philanthropy is premised on the idea that foundations want to maximise the impact of their interventions and often engage in partnerships to achieve scale. This often implies working on countries' main gender-oriented priorities. In reality, many foundations favour a combination of these two approaches, depending on the context, partners and the maturity of the programme or project.

This section analyses how the foundations working on gender whose data is captured in the OECD report allocate their funding based on these two approaches. In other words, it asks are foundations targeting their support for gender where it is needed the most or where it goes the longest way to achieve scale?

3.1. Gap-filling philanthropy

Foundations work differently from official donors. They are not bound by political cycles, and they operate in a more flexible way than governments or ODA donors, because they are not accountable to taxpayers. Under the “gap-filling” approach, these characteristics allow them to:

- Work directly with **implementing partners on the ground** (beyond the “usual suspects”) such as local NGOs, grassroots women's organisations (GWOs) or social enterprises, and to leverage the implementation partners' presence on the ground to identify gaps and provide tailored solutions (see Box 3.1).
- **Be flexible in their funding modalities** and/or provide unearmarked funding.
- Target weak or **underinvested areas**: identifying sub-sectors, regions or countries that are not, or only in a limited fashion, funded by the ODA donor community but where there are clear unaddressed needs for women and girls.
- Have a greater **appetite for risks** (risky projects and/or risky/fragile environments).
- **Test new approaches**, pilot them and try again if they fail.
- Use **new tools and innovative financing models** such as social impact investment, mission-related investments (MRI) or gender-lens investing⁸ (GLI) and/or development impact bonds (see Box 3.2).

Taking this approach, foundations working for gender could be natural partners to complement existing financing for development efforts to support gender equality. However, the OECD survey shows that foundations working on gender have not, for the most part, followed this “gap-filling” or “pilot-oriented” approach.

⁸ Gender lens investing (GLI) is an approach to considering investments through gender lenses and allocating capital to drive gender equality while also generating financial returns (IIX, 2018).

First of all, as seen above, the OECD survey revealed that **the majority of philanthropic funds for gender is being channelled through well-established non-governmental organisations (NGOs) and multilateral organisations** such as Population Services International, Marie Stopes International, International Planned Parenthood Federation, FHI360 and UNICEF (Figures 2.15 and 2.16). This may be because engaging with frontline partners, including GWOs, bears higher costs and risks than engaging with well-established organisations, as they often require closer monitoring, capacity building support and other forms of non-financial support. Their quality standards and processes are also often less robust than those of international NGOs.

Box 3.1. The Kering Foundation's support to grassroots and women's organisations

In 2016, the Kering Corporate Foundation embarked on a three-year partnership with HER Fund to empower Hong Kong's marginalised women and combat domestic violence. The HER Fund gives grants to Hong Kong grassroots organisations and self-organised women's groups that principally work with women from marginalised communities: migrant women from mainland China, migrant workers, ethnic and Lesbian Bisexual Transgender and Queer (LBTQ) women. To ensure the effective implementation of projects, and in addition to this funding, HER Fund also runs workshops and training sessions for these women's rights organisations in order to empower them.

Contributed by the Kering Corporate Foundation

Second, the geographical distribution of flows targeting gender (see Box 2.4) reveals that while both foundations and bilateral donors working on gender are active in similar regions, their target countries are dramatically different. ODA for gender is more evenly spread across a larger number of beneficiaries, although rather concentrated in selected countries, with the top 10 beneficiaries representing 32% of total ODA country-allocable flows. **Philanthropic giving for gender has a clear preference for African countries, and India (which accounts for almost two-thirds of philanthropic giving for gender to Asia).** As a result, there is no significant evidence that foundations focus their support on countries where ODA donors are not or barely present.

However, foundations' giving for gender is particularly concentrated in certain countries that are not a priority for ODA donors, like China, Mexico and South Africa, where they play significant role in supporting development. This can be partially explained by the significant philanthropic giving by domestic foundations in these countries.

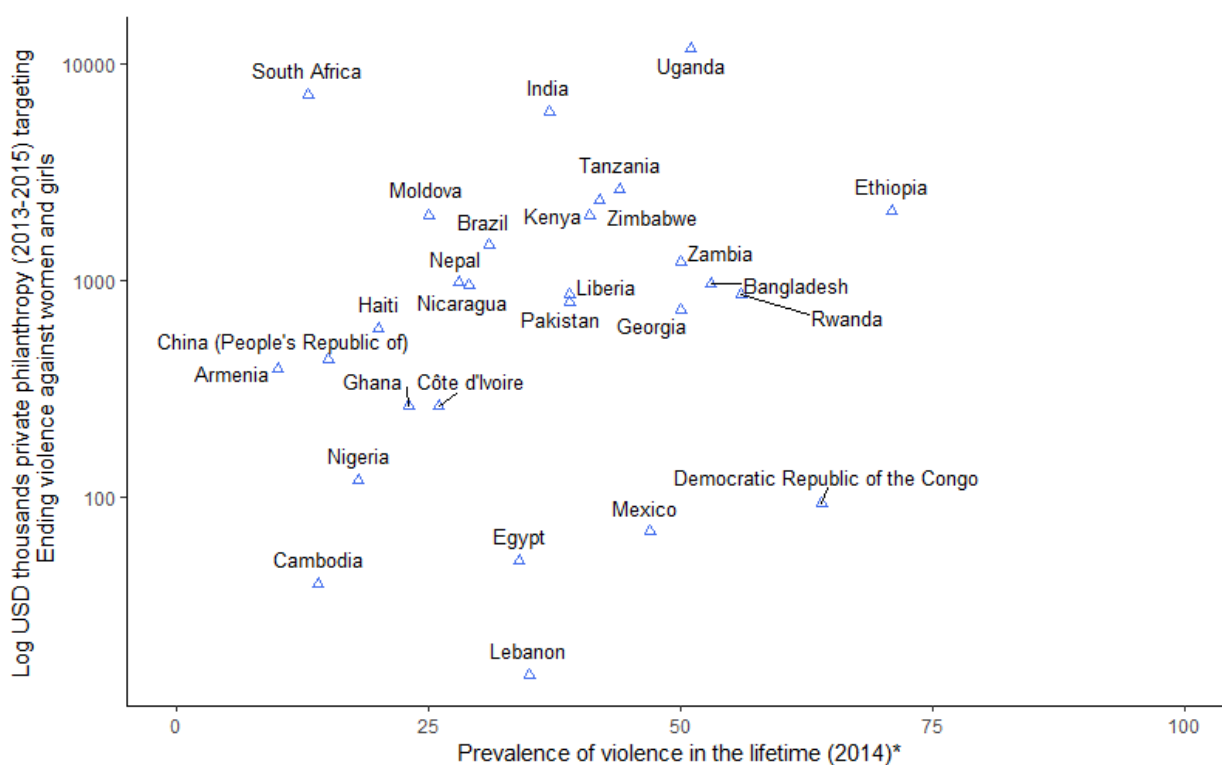
Furthermore, **foundations are more inclined to work in more stable environments, with only 38% of their giving for gender allocated to conflict-affected and fragile states** (OECD, 2015). In comparison, bilateral donors show a greater willingness to engage in fragile contexts, directing 47% of their country-allocable ODA to these types of countries (OECD, 2015). This can be partially explained by the fact that most foundations do not have a presence on the ground, which makes it more difficult to identify partners in harder-to-reach places. In addition, for foundations following a venture philanthropy approach, working with social enterprises requires an enabling environment with a certain level of access to markets, infrastructure and capacities.

Third, although foundations have greater flexibility than ODA donors in deciding how to allocate funding, given their disconnect from the political cycle and their mission-driven orientations, the comparison of sectoral allocations between ODA donors and philanthropic giving for gender equality revealed that

foundations' value added may not primarily be in addressing sectoral gaps (see Box 2.6). In fact, **foundations' support for gender remains largely concentrated in the social infrastructure and services category**, which also represented over half of the ODA flows targeting gender, challenging the idea that foundations focus on overlooked sectors.

Moreover, foundations' allocation decisions do not seem to be primarily driven by the identified needs of women and girls in each country. For instance, a comparison between foundations' giving to ending violence against women and the prevalence of violence in the lifetime of women by recipient country shows no statistically significant link between the two indicators (see Figure 3.1). In other words, the amount of support given by foundations for a specific purpose is not always clearly associated with the intensity of the issues.

Figure 3.1. Foundations' giving to end violence against women and girls, 2013-15, and the prevalence of violence in the lifetime of women, 2014



* The percentage of women who have experienced physical and/or sexual violence from an intimate partner at some time in their life.

Sources: OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*,

www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm;

OECD (2014), *OECD International Development Statistics: Gender, Institutions and Development* (database), <https://doi.org/10.1787/data-00728-en>.

Finally, results suggest that **foundations are increasingly exploring more innovative funding approaches beyond traditional grant-making**. As revealed in the OECD qualitative survey, foundations working on gender are providing non-financial support to grantees mainly through access to networks and strategic consulting (see Figure 2.18) and longer-term grants than philanthropies in general (see Figure 2.19). In addition, foundations test cutting-edge solutions, such as creative media and digital tools (see Box 3.2), and financial instruments including loans, guarantees and equity investments (see Figure 2.17).

Nonetheless, these practices are not yet widespread with only a few progressive foundations promoting a turn towards innovation. For instance, the use of innovative financial models is quite limited and ad hoc, with 94% of the main surveyed foundations working on gender using grants to provide financial support (Figure 2.17). This is even more apparent in terms of volume, given that equity (USD 1.6 million) and loans (USD 5.5 million) together did not represent more than 1% of total philanthropic gender-related flows. This shortage of risk-tolerant capital to test new approaches often prevents the expansion of innovative financial mechanisms required to create gendered impact (IIX, 2018).

Box 3.2. Examples of foundations using innovative solutions and financial tools to provide support for women and girls

B100Ragl: Using creative media to change attitudes in the Middle East

“B100Ragl” (Arabic for *Worth 100 Men*) is an online fiction series that engages men and women in the Middle East in an open and constructive debate on women’s rights and their role in society.

Originally a radio programme, B100Ragl has developed into an animated ‘edutainment’ series broadcast online. The audience follows the life of the main character, Noha, a journalist who encounters a wide range of social issues commonly faced by women throughout the region. She fights prejudice and oppression, presents creative solutions and becomes a role model for the whole society. The series also aims to engage men on these issues and addresses the topics of masculinity in the Arab World. In addition, offline workshops complement the online fiction and provide information, increase awareness and knowledge, and contextualise the digital content with real-life, local circumstances.

Contributed by the Womanity Foundation

MyAgro: Empowering women female farmers in Senegal through innovative savings programme

In Senegal, Fondation CHANEL is supporting myAgro to expand its partnership with women’s savings groups and broaden its activities to other regions in the country. MyAgro has developed an innovative savings programme to help farmers double their farm income and move out of poverty. The Mobile Layaway system allows farmers to purchase seeds, fertilizer, and farming equipment little by little, week by week, by using their mobile phone. In Senegal, myAgro is partnering with women’s savings groups, enabling more women to access the layaway programme, as well as comprehensive training and in-field support.

Contributed by Fondation CHANEL

Asia Women Impact Fund (AWIF)

The **Sasakawa Peace Foundation** carved out around USD 100 million from their endowment to launch the Asia Women Impact Fund (AWIF) in 2017. The aim of the AWIF is to make impact investments to improve the lives of women in Asia and to generate competitive financial returns. The latter will be used to support women entrepreneurs and to strengthen the ecosystem for gender-lens investing in Asia. The fund’s

returns will also serve to provide concessionary financing to women entrepreneurs in Southeast Asia who need patient capital to grow their business. In this way, Sasakawa Peace Foundation seeks to create synergies between investing and grant-making activities to maximise gender impact.

Contributed by the Sasakawa Peace Foundation

Agromujer

In the Dominican Republic, the **BBVA Microfinance Foundation** has developed Agrocrédito, the first sustainable agricultural credit to fund working capital or fixed assets for small producers in the poorest rural areas. This product was developed to address the financial needs of small Dominican farmers who are often struck by acute poverty. It is accessible to entrepreneurs through joint collateral, without the need to present land titles as guarantees, which usually limit the access to financial services for small farmers. It is adapted to farmers' specific productive cycles, with repayments adjusted to farmers' income and liquidity dynamics, and also includes financial education in risk management of agricultural activities.

In addition, Agrocrédito has developed a specific product for women farmers called Agromujer. The purpose of this product is to empower women that have an economic activity independent from their husbands, so they can participate in income generating activities for the family. In 2017 it received the Financial and Business Innovation Award from the Inter-American Development Bank.

Contributed by the BBVA Microfinance Foundation

In sum, the OECD survey results suggest that foundations' decisions on where to invest for gender equality are driven by considerations other than "filling the gaps". This may partly be because of limited data and information available to them on where the gaps lie in funding for gender, together with foundations pursuing their own strategies across many countries based on an overall analysis (as opposed to country specific assessments). This does not mean that some foundations do not conduct gap analysis, but that this practice does not seem widespread.

3.2. Impact at scale and coalition philanthropy

As foundations are becoming increasingly relevant and visible actors in international development, there is a **growing view that philanthropy's value-added also lies in its ability to measure impact and allocate funds as effectively as possible to create social (measurable) value**. Some foundations are in fact increasingly looking for "value for money" (VFM), a concept that has become popular amongst donor agencies and governments, and which aims to find the best balance between the "three E's" – economy, efficiency and effectiveness (Jackson, 2012). As a result, many foundations conduct assessments of whether the expected development results of their projects or programmes justify the costs (DFID, 2011).

In addition to the quest for impact, foundations have also increasingly sought to achieve scale. As a result, foundations look for evidence base about the effectiveness of projects through monitoring and evaluation (M&E) and seek to replicate successful programmes on a larger scale by engaging in partnerships and coalitions with other development actors.

Under this “impact at scale and coalition philanthropy” assumption, the characteristics of philanthropic giving would translate into:

- Developing projects with clear **key performance indicators (KPIs)** and relying on rigorous **monitoring and evaluation (M&E)**; this implies continuously assessing interventions to ensure the efficiency of their resources and to build evidence to support their approaches.
- **Measuring impact** systematically.
- Seeking to achieve **value for money** to maximise the impact of each dollar spent.
- Replicating successful programmes on a **larger scale** and looking to contribute to “**systems change**”, which often requires **aligning strategies with governments’ priorities**.
- Collaborating with governments and ODA donors, including through **partnerships and coalitions** and the occasional use of **pooled funds** or other collective funding mechanisms

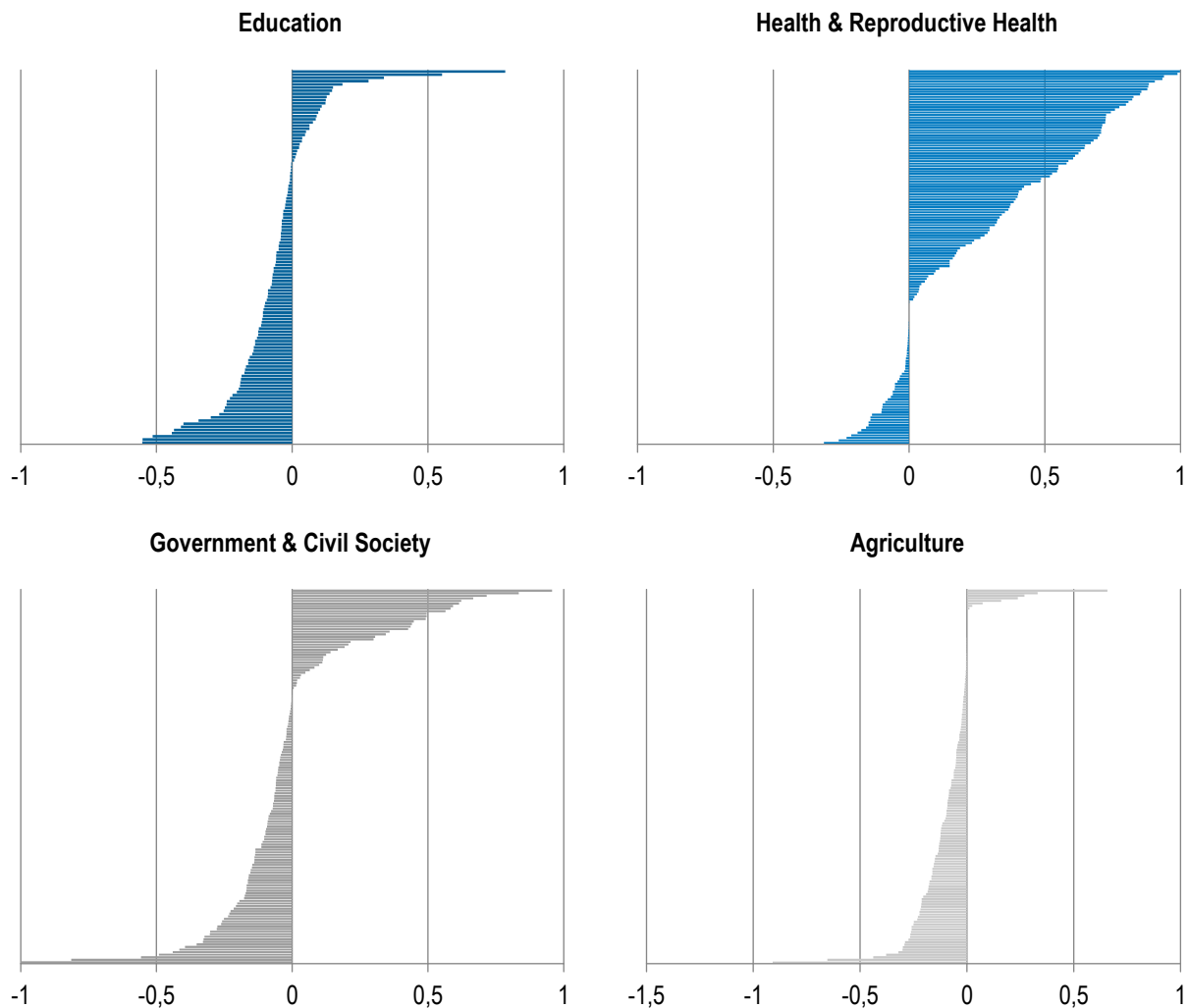
The OECD survey reveals that foundations supporting gender tend to favour approaches premised on measurement, the quest for impact and partnerships, more than they follow a “gap-filling” approach. Yet, it also finds that foundations supporting gender do not homogeneously engage along the lines of the approach described above.

First, as confirmed by the OECD survey (Figure 2.20), **all main foundations working on gender surveyed measure the impact of their programmes and the majority carry out these evaluations systematically**. Yet, only a few foundations were found to measure their own institutional performance, while 18% of the surveyed foundations had never carried out an internal evaluation of their impact. Nevertheless, it is worth noting that foundations working on gender do measure the impact of their philanthropic giving more than the rest of foundations surveyed by the OECD. Indeed, they were found to evaluate both their programmes and their institutional performance more regularly than the broader philanthropic sector.

However, **what to measure and the quality of these measurements remain challenging issues for many foundations**. The drivers of gender inequality discrimination against women are often discriminatory legal frameworks and underlying harmful social norms and behaviours, which are hard to track, in part due to the scarcity of data.

Second, one would assume that large coalitions and partnerships would be aligned with developing country governments’ gender strategies or SDG plans. Figure 3.2 shows the level of alignment in the four main targeted sectors between foundations’ giving for gender and government development priorities, using ODA flows targeting gender as a proxy. The level of alignment in the figure is represented as the difference between the percentage of funds allocated to the sector in a given country by ODA and philanthropy in support of gender equality. If foundations were using national development strategies as an orientation for their work, one would expect to see proportional investments of ODA and philanthropy for gender in the main sectors for each country (bars moving around 0). However, if the bar is to the right or to the left side of the axis it means the sector in a given country is significantly more targeted by philanthropy or the ODA respectively.

Figure 3.2. Alignment between foundations' giving for gender and government development priorities by country, 2013-15



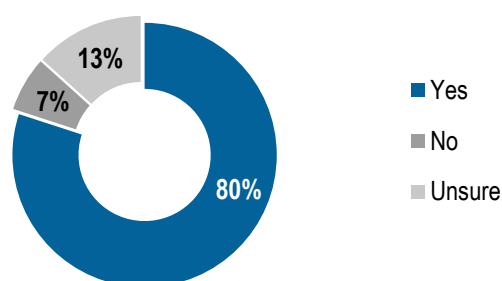
Note: ODA flows targeting gender are used as a proxy for government development priorities. Figures include values only for countries which received flows for the sector from philanthropy and/or ODA: 118 countries in education, 136 countries in health and reproductive health, 146 countries in government and civil society and 148 countries in agriculture.

Source: OECD (2018c), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>; OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

The picture emerging from this comparison does not seem to support the claim that foundations seek alignment with national government priorities in the development agenda. **Philanthropy for gender appears to follow its own priority-setting and to be using its own criteria to guide its sectoral allocations.** Agriculture is the only sector where there appears to be closer alignment between the two categories of funders. The case of India, a country which receives both gender-related ODA and philanthropic flows in large volumes, is a telling example of this disconnect between governmental strategies and priorities (see Box 3.3).

This finding is in direct contradiction with the findings of the OECD survey regarding how foundations align with the SDGs (Figure 3.3). In fact, when foundations were asked whether they aligned their projects with the SDGs, 80% of foundations working on gender responded positively. One can assume that this claim was made in a rather general way. **There are no data indicating whether foundations working on gender specifically supported SDG5.**

Figure 3.3. Foundations' alignment with the SDGs (main foundations working on gender)



Source: OECD (2018d), *Survey on Private Philanthropy for Development 2013-15: Qualitative Questionnaire*, www.oecd.org/site/netfwd.

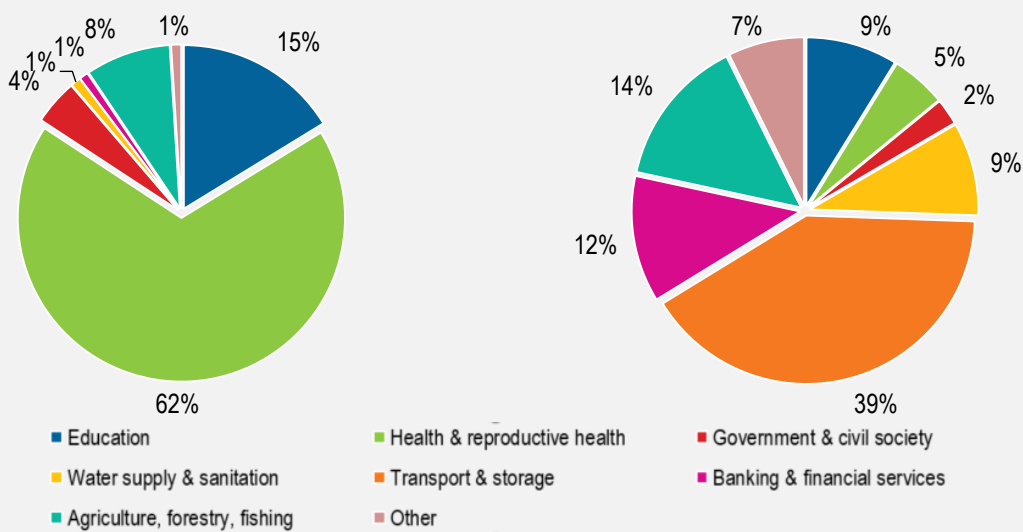
Note: The sample used for this graph consists of the top foundations in terms of the amount of flows provided targeting gender equality (16 out of the 84 foundations who responded to the qualitative questionnaire).

Finally, while there is no strong evidence that foundations working on gender aligned their objectives with national development strategies, the OECD survey revealed that **foundations often sought to co-ordinate with national governments in the design and implementation of projects to support women and girls** (see Figure 2.21). Forty percent of the surveyed foundations working on gender consider that they “often” collaborate with governments, while 27% “always” do. Only one-third of foundations (33%) rarely or never look to engage with governments in developing countries when implementing their gender equality programmes. With the goal of achieving system change and maximum impact, these foundations choose to co-ordinate with other national development actors by pooling funds and engaging in coalitions.

Box 3.3. Foundations' alignment with national development strategies: The case of India

India was the main beneficiary of foundations' giving for gender and the second most targeted by gender-marked ODA flows over the 2013-15 period. While both ODA donors and foundations provided important support to gender equality in the country, the sectoral allocation of their funds was largely different (Figure 3.4), revealing that foundations and ODA other donors have different priorities and follow different strategies when it comes to advancing gender equality and women's empowerment in the country.

Figure 3.4. Flows targeting gender equality allocated to India, 2013-15



Sources: OECD (2018c), *OECD International Development Statistics: Creditor Reporting System* (database), <http://www.oecd.org/dac/stats/idsonline.htm>; OECD (2018b), *Survey on Private Philanthropy for Development 2013-15: Data Questionnaire*, www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm.

Indeed, foundations were found to give significant funding to health and reproductive health, contributing especially to the achievement of the targets set by SDG3 ("ensure healthy lives and promote well-being for all at all ages"). This was much in line with the Indian government's Twelfth Five Year Plan (2012-17), which accorded bringing maternal mortality rates (MMRs) down and addressing malnutrition, especially in women, as key priority areas for improvement (Planning Commission Government of India, 2013).

Note: Figures on ODA flows in this box refer to 2013-15 commitments in constant 2015 prices and includes only sectoral-allocable ODA flows from DAC countries.

4. KEY LESSONS AND RECOMMENDATIONS

Given the limited amount of philanthropic giving in support of gender equality how philanthropy for development allocates funding is of critical importance. This support can indeed serve to test approaches that other development actors have not explored yet, or to leverage other sources of funding to achieve impact at scale.

Overall, **this note finds – based on the analysis of the OECD survey covering 2013-15 – that the philanthropic sector for gender is significantly fragmented and that allocation decisions are made quite heterogeneously among foundations.** While survey results provide some evidence to support the two (not mutually exclusive) assumptions of how foundations allocate funding and how they view their role, they **mainly reveal that the commonly accepted features of philanthropy for development cannot be used to predict behaviour and strategies in support of gender.**

The data do show an **inclination towards innovation, and evidence that foundations are testing new solutions and using financial tools, as well as longer-term and non-financial support.** Yet, **these practices are not the norm and their priorities in terms of country allocations or targeted populations seem to be less innovative.** Similarly, while the main foundations working on gender often claim alignment with the SDGs and interest in engaging with national governments, their sectoral allocation at the country level reveals limited alignment with national development strategies.

The evidence of the OECD survey and the insights from netFWD's Gender Working Group participants suggest that regardless of whether foundations decide to primarily target gaps or to support impact at scale, there are important entry points to further optimise the support and possible impact of philanthropy in support of gender equality. These include:

- **Increasing the availability of data** on philanthropic giving for gender. Although sharing information on philanthropic giving entails some costs for foundations, these would be offset by the advantages of increased knowledge about the sector. Data on philanthropic giving in support for gender equality and women's empowerment allow development partners at large to make informed decisions and design more effective strategies to achieve their objectives. For foundations seeking to target geographies or sectors where this support is most needed, reliable and comparable data can facilitate better allocations of funds and avoid duplication of efforts. Similarly, for foundations engaging in partnerships or working in collaboration with other actors, information on where and how other foundations are active is essential to leverage collective support.
- **Evaluating impact and sharing lessons.** Carrying out rigorous and continuous evaluations of projects and foundations' institutional performance is essential to build evidence to make more informed allocation decisions. Making impact measurement a systematic feature of engagement while sharing lessons learned can allow foundations to identify what works to achieve greater impact in support of SDG5.
- **Conducting needs assessments to drive allocations and giving more attention to "leaving no one behind".** Given that philanthropy and ODA are largely concentrated in a few selected sectors, like health and reproductive health or education, there is a great potential for foundations to diversify their efforts and address a wider range of issues that affect women and girls (see examples in Box 4.1). These can be identified for instance by using the Social Institutions and Gender Index

(SIGI)⁹, which allows access to 180 individual country notes containing comprehensive qualitative information on legal frameworks and action plans to protect women's rights and promote gender equality. Some of the under-funded areas identified by the survey include banking and financial services or violence against women. Other foundations might elect to focus on niche sectors and to target marginalised populations that are often overlooked by larger donors.

- **Innovating – testing approaches and using new funding instruments.** Piloting novel approaches to address gender equality and women's empowerment is critical to identify new ways to create lasting change. Similarly, foundations are well positioned to test innovative financing approach in support gender, such as gender-lens investing.
- **Further supporting the front line.** Local NGOs and grassroots women's organisations received very little funding from foundations compared to other local organisations. They are in particular need of unrestricted and long-term support.
- **Enhancing collaboration to improve the quality of outcomes.** While pooling funds and leveraging seed capital are essential to fund and address large-scale problems, this cannot be done without improving collaboration with other development actors and governments through partnerships. In sectors like reproductive health, government and civil society, and education, which are significantly targeted by foundations supporting gender, establishing multi-stakeholder partnerships and supporting platforms to share information is critical to achieve collective impact.

⁹ <https://www.genderindex.org/>

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ANNEX A

OECD survey on Private Philanthropy for Development

This policy note draws on results of the OECD Survey on Private Philanthropy for Development (2018b, 2018d) conducted by the OECD Development Co-operation Directorate (DCD) in co-operation with the OECD Development Centre.

Methodology

The survey recorded information from the 147 largest philanthropies worldwide working for development, during the 2013-15 time period. The data collection took place between 2016-17 and operated through two questionnaires:

- A data questionnaire to collect activity-level (or project-level) data. These included data on geographic and sectoral allocation, financial instrument used, channels of delivery and modality of giving. The format and definitions used in the questionnaire were compliant with the OECD-DAC statistical standards to ensure comparability with ODA flows.
- A qualitative questionnaire with 24 multiple choice questions on foundations' activities, transparency and accountability practices and co-operation with other development actors.

The survey collected inputs from 143 foundations for the data questionnaire and 82 foundations for the qualitative questionnaire. Four foundations filled only the qualitative questionnaire due to capacity constraints or confidentiality concerns.

Scope of the survey: Private philanthropic flows for development

A working definition of private philanthropic flows for development was developed for the OECD data questionnaire. This aimed to ensure comparability with OECD DAC statistics on development finance such as ODA, as well as to avoid double counting at the international level.

Private philanthropic flows for development refer to transactions from the private sector having the promotion of the economic development and welfare of developing countries as their main objective and which originate from foundations' own sources, notably endowment, donations from companies and individuals (including high net worth individuals and crowdfunding), legacies as well as income from royalties, investments (including government securities), dividends, lotteries and similar.

Following this definition, philanthropic activities funded by other philanthropic foundations or governments were out of scope. Furthermore, charitable giving from religious institutions was only included if aimed at supporting development and improving welfare.

For more information, see <http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda-foundations.htm>.

Classification of flows targeting gender equality

DAC Gender Equality Policy Marker

The DAC gender equality policy marker is a qualitative statistical tool to record aid activities that target gender equality as a policy objective. It is used by DAC members as part of the annual reporting of their aid activities to the DAC. The gender equality policy marker is based on a three-point scoring system:

- "Principal" means that gender equality is the main objective of the project/programme and is fundamental in its design and expected results. The project/programme would not have been undertaken without this objective.
- "Significant" means that gender equality is an important and deliberate objective, but not the principal reason for undertaking the project/programme.
- "Not targeted" means that the project programme has been screened against the gender market but had not been found to target gender equality.

For more information, see <http://www.oecd.org/dac/gender-development/dac-gender-equality-marker.htm>.

Philanthropic support to women and girls

In the OECD survey on private philanthropy for development, foundation support to women and girls includes all activities pertaining to reproductive health, family planning, support to women's equality organisations and institutions, ending violence against women and girls, and all other activities explicitly targeting women, girls, brides, etc. The classification of foundation giving is based on the information provided in the descriptive fields of the survey.

For the purpose of this publication, it is assumed "support for gender equality" and "support to women and girls" overlap and the terms are used interchangeably.

Sector classification

Allocation by sector is based on the DAC sector classification purpose codes. Sector coding identifies the specific areas of the recipient's economic or social development the transfer intends to foster. See below for some key definitions:

Economic infrastructure and services

In the DAC sectoral classification, economic infrastructure and services relate to assistance for networks, utilities and services that facilitate economic activity, notably transport and storage, communications, energy generation, distribution and efficiency, banking and financial services, and business and other services.

For more information, see <http://www.oecd.org/dac/stats/purposecodessectorclassification.htm>.

Ending violence against women and girls

In the DAC sectoral classification, ending violence against women and girls refers to support to programmes designed to prevent and eliminate all forms of violence against women and girls or gender-based violence. This encompasses a broad range of forms of physical, sexual and psychological violence including but not

limited to: intimate partner violence (domestic violence); sexual violence; female genital mutilation/cutting (FGM/C); child, early and forced marriage; acid throwing; honour killings; and trafficking of women and girls. Prevention activities may include efforts to empower women and girls; change attitudes, norms and behaviour; adopt and enact legal reforms; and strengthen implementation of laws and policies on ending violence against women and girls, including through strengthening institutional capacity. Interventions to respond to violence against women and girls/gender-based violence may include expanding access to services including legal assistance, psychosocial counselling and healthcare; training personnel to respond more effectively to the needs of survivors; and ensuring investigation, prosecution and punishment of perpetrators of violence.

For more information, see <http://www.oecd.org/dac/stats/purposecodessectorclassification.htm>.

Humanitarian assistance

In the DAC sectoral classification, humanitarian assistance includes activities to save lives, alleviate suffering and maintain and protect human dignity during and in the aftermath of emergencies.

For more information see www.oecd.org/dac/stats/purposecodessectorclassification.htm.

Production sectors

In the DAC sectoral classification, production sectors include activities in support of agriculture, forestry, fishing, industry/manufacturing, mineral resources and mining, construction, tourism and trade policy and regulations and trade-related adjustments.

For more information, see <http://www.oecd.org/dac/stats/purposecodessectorclassification.htm>.

Social infrastructure and services

In the DAC sectoral classification, social infrastructure and services refer to efforts to develop the human resource potential of developing countries in the sectors of education, health, population policies/programmes and reproductive health (further health and reproductive health), water supply and sanitation, government and civil society and other social infrastructure and services.

For more information, see <http://www.oecd.org/dac/stats/purposecodessectorclassification.htm>.

Women's equality organisations and institutions

In the DAC sectoral classification, women's equality organisations and institutions refers to support for institutions and organisations (governmental and non-governmental) working for gender equality and women's empowerment.

For more information, see <http://www.oecd.org/dac/stats/purposecodessectorclassification.htm>.

For full information on sector classification and list of purpose codes, see <http://www.oecd.org/dac/stats/purposecodessectorclassification.htm>.

Other key concepts and definitions

Channels of delivery

Channels of delivery refer to the first implementing partner of foundation giving. It is the entity that has implementing responsibility over the funds and is normally linked to the extending agency by a contract or other binding agreement, and is directly accountable to it.

For more information, see paragraph 164 of [http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DCDDAC\(2016\)3FINAL.pdf](http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DCDDAC(2016)3FINAL.pdf) (OECD, 2018a).

Country Income Group Classification

Countries are structured, according to their income level as defined by the World Bank, in the following income group categories:

- Least developed countries (LDCs): a group established by the United Nations. To be classified as an LDC, a country's income, economic diversification and social development must fall below established thresholds.
- Other low-income countries (LICs): includes all non-LDCs with per capita gross national income (GNI) of USD 1 045 or less in 2013 (World Bank Atlas basis).
- Lower middle-income countries (LMICs): countries with GNI per capita (World Bank Atlas basis) between USD 1 046 and USD 4 125 in 2013. LDCs which are also LMICs are only shown as LDCs, not as LMICs.
- Upper middle-income countries (UMICs): countries with GNI per capita (World Bank Atlas basis) between USD 4 126 and USD 12 745 in 2013.

For more information, see <http://data.worldbank.org/news/2015-country-classifications> and <http://www.oecd.org/dac/stats/daclist.htm>.

Gender-lens investing (GLI)

Gender-lens investing is defined as an approach to considering investments through gender lenses and allocating capital to drive gender equality, while also generating financial returns (Impact Investment Exchange (IIX), 2018).

Official development assistance (ODA)

The DAC defines ODA as those flows to countries and territories on the [DAC List of ODA Recipients](#) and to [multilateral institutions](#) which are:

- i. provided by official agencies, including state and local governments, or by their executive agencies; and
- ii. each transaction of which:
 - a) is administered with the promotion of the economic development and welfare of developing countries as its main objective; and
 - b) is concessional in character and conveys a grant element of at least 25% (calculated at a rate of discount of 10%).

For more information, see <http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/officialdevelopmentassistancedefinitionandcoverage.htm>.

Support to fragile contexts

Support to fragile contexts corresponds to philanthropic flows to the list of fragile contexts as identified in the 2015 OECD report on fragility.

For more information on the States of Fragility Report, see <http://www.oecd.org/dac/conflict-fragility-resilience/listofstateoffragilityreports.htm>.

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