

# Cover letter: what opportunities exist for philanthropic partnership in the Global South?

Discover the findings and recommendations of two studies that uncover opportunities for partnerships in Africa, Asia, the Caribbean, and Latin America. This cover letter provides a summary of both studies.

## More information

🔗 Explore study 1: Asia, the Caribbean, and Latin America ([part one-executive summary](#), [part two](#), [part three](#), and [part four](#)) These documents are hosted [on this website](#).

🔗 Explore study 2: Africa ([executive summary](#), [full report](#), and [partner profiles](#))

## Context and background

### **Why we commissioned these studies**

As a global foundation with staff members in several countries, we aspire to provide impactful support to communities and people in their efforts to create a fairer, safer, and more sustainable world. We support systems-level solutions that are led by local communities and constituency-led organisations to achieve transformational change.

As a foundation, we wanted to learn about local solutions for providing direct support in Africa, Latin America, the Caribbean, and Asia. We also wanted to hear directly from communities and leaders about how we could provide the best type of support and be good partners. Therefore, we commissioned two studies to: 1) map the ecosystem of coalitions, civil society organisations, networks, and philanthropic support institutions (i.e., “intermediaries” and “re-granters”) in Africa, Asia, the Caribbean and Latin America; and 2) provide recommendations on how to improve and enhance funding practices.

The recommendations of the research focused on providing advice about how funders can work with the ecosystem. The reports included recommendations on how to: 1) shape and cultivate practice; 2) grow and enable a new generation of partners; and 3) invest and engage the ecosystem for lasting impact. Ultimately, the findings suggested that there is ample space to work with the ecosystem that bring together complex issues and pursue solutions with agility, cultural awareness, and respect for local knowledge and needs.

### **A note about the studies**

These key learnings and recommendations in both scoping studies give us a snapshot of a moment in time. We recognise that there are many more civil society organisations, networks, and philanthropic support institutions that are doing important and impactful work in these geographies and may not be mentioned in this report. While this work does not purport to provide an exhaustive list of organisations, it gives us a view of the status of the ecosystem. For funders who wish to do more in these geographies, these reports offer a great starting point and offer principles on how to do so.

### **What we hope to achieve by sharing these results**

We value collaboration, and actively seek partners in our collective efforts to contribute to a better world. We hope that the results of these studies also inspire you and support your efforts.

### **Who carried out the research**

Thirteen consultants spread across Africa (Jennifer Mohamed-Katerere, Chilande Kuloba-Warria, Elisabeth Kwamou, and Lamma Ewi,) Latin America and the Caribbean (Monica Tapia, Lina Villa, Lina Garcia, Catalina Cock, Mariana Lome, and Gioel Gioacchino), and Asia (Sumitra Pasupathy, Gouthami, and Andrea Rodericks) carried out the research over a year. Each consultant has 10 to 30 years of experience working with civil society as practitioners, researchers, and activists.



### **How the studies were undertaken**

The studies benefitted from participatory approaches including interviews with more than 150 community leaders through individual interviews, focus group discussions, and in-depth peer learning discussions. It also included self-assessment surveys and desk research. The approach used methods to shift power as it enabled the field to discuss collaboratively and in safe spaces to provide information and suggestions the philanthropic community.

The consultants also had in depth discussions with several Oak Foundation staff members who have been supporting the field for several years to draw on their insights.

## Goals and objectives

The overall goals of the studies were to: (1) map the ecosystem of coalitions, civil society organisations, networks, and philanthropic support institutions (i.e., “intermediaries” and “re-granters”) in Africa, Asia, the Caribbean, and Latin America; and (2) provide recommendations on how to improve and enhance funding practices in these geographies.

To do this, the studies aimed to:

- 1) **Give visibility to the existing ecosystem**, in particular those that are Global South led and grown, as well as those that are located beyond the capital cities.
- 2) **Unpack and map opportunities** by researching philanthropic Global South led and grown intermediaries, civil society organisations, networks, and coalitions, especially those with an interest in enhancing their capacity to scale.
- 3) **Understand the priorities of intermediaries, civil society organisations, networks, and coalitions in the**

**key geographies**, including self-strengthening priorities, their ecosystem positioning, and capacity needs.

- 4) **Shift practice and move resources** to where actions and impacts are – improving the ability of these organisations to receive funding directly.

## Key learnings

### **Key learning 1: There are concrete opportunities for support**

There are concrete opportunities for funders to provide support in Africa, Asia, the Caribbean, and Latin America to better serve communities.

The reports found over **120 philanthropic support institutions, coalitions, civil society organisations, and networks** with capacities to operate at different scales (local, national, regional, and global), which philanthropy can access and support. The consultants identified 30 potential partners in Asia, Latin America, and the Caribbean. Of these, 26 have received funding from Oak Foundation. The consultants found 90 potential partners in

Africa. The Africa report grouped potential support into five categories: 1) established intermediaries; 2) civil society funds; 3) civil society organisations; 4) community funds; and 5) high net-worth individuals. The report for Asia, Latin America, and the Caribbean provided seven trends that point to where the ecosystem is headed and where there is room to leverage new dynamics. These trends are integrated in this cover note.

Overall, in all regions, the consultants found that taking an approach that prioritises work at the intersection of conservation, climate, nature, human rights, and gender equality was widely welcomed. In short, the studies suggest that the potential partners are more than grassroots and community-based: they are networked, impactful, and transformative, operating at various scales: 1) local – community and provincial; 2) national; 3) regional/continental – connecting countries and economic blocs; and 4) global.

### **Key learning 2: Promising practices of potential partners**

The studies suggest that philanthropy can better access the role and capacities of individual organisations by looking at

the bigger picture and systems in which they operate and the constituencies they serve. There are several benefits of working with the ecosystem and partnering with or expanding the capabilities of these coalitions, civil society organisations, networks, and philanthropic support institutions.

The benefits of working through the ecosystem include:

- 1) **Providing nuanced and strategic insight into grant-making strategies:** These potential partners provide nuanced and strategic insight into grant-making strategies to create social justice, environmental, and human rights change. They engage people who understand the context complexities, have a systemic perspective, have local legitimacy, and design or advise on strategy. They build movements and coalitions, provide advocacy support, and conduct research, often at the same time as providing grants. There are networks and others in the ecosystem that work across sectors and issues to drive change and serve diverse populations. Local organisations with deep knowledge of what is needed for change can be catalysts for system innovation and impact. They

connect efforts and networks to influence change at various scales: local, national, regional, and global.

- 2) **Strategically managing hiring and board governance for complex contexts with a systemic perspective and local legitimacy:** They proactively recruit, hire, and train diverse and local leaders as board members and staff that influence decision making, accountability, and governance.
- 3) **Navigating legal and fiscal barriers effectively:** They understand the legal and fiscal barriers and how to work within them. This is a key value that allows them to reach out to grassroots and informally operated groups. To this end, appropriate support can enable them to operate nimbly and astutely in complex social, political, and legal circumstances. They can also share the risk and reduce the bureaucracy for all involved.
- 4) **Handling financial complexity efficiently for fundraising, re-granting, and overhead costs:** They manage financial complexity for fundraising, re-granting, and overheads costs. Among these

processes is the break-up of large grants, dispersing them into smaller quantities and managing them in a timely manner, aligning both the grants and the communities' different needs and time commitments.

- 5) **Innovating granting procedures and fostering partnerships:** They develop and experiment with appropriate granting procedures: public calls, participatory grant-making, context-based due diligence, trust mechanisms, and deliberative processes to select grantees and assign grants. They establish respectful, mutually-accountable, and equitable relationships with potential partners, or they could foster and maintain such relationships.
- 6) **Building capacities and connecting small or community-based partners:** They convene and connect small or community-based grantee partners, building their capacities to navigate complex regulatory frameworks. Their aim is to attract new donors with complementary strategies and portfolios.

- 7) **Leveraging funding for greater impact through complementary strategies:** They aim to attract new donors with complementary strategies and portfolios.
- 8) **Monitoring and communicating results, including annual reports:** They provide services for monitoring and communicating results, impact, and learnings, which are crucial to gain local legitimacy and attract more donors. Most of them produce annual reports and are transparent about their funds and results.
- 9) **Nurturing complementary intermediary relationships to enhance impact across regions and themes:** They nurture intermediary relationships in other regions and thematic areas that act in a complementary way to enhance impact.

### **Key learning 3: Building better relationships and trust**

*"The future of philanthropy is one where organisations and funders work horizontally and collaboratively, strengthening tools based on the needs, visions, and realities of communities."*

Ultimately, the recommendations of the research focused on providing advice about how funders can work with the ecosystem to go beyond just distributing funds. The recommendations suggest that funders should:

- **Work with the ecosystem with more agility, cultural awareness, and respect for local knowledge and needs.**
- **Transform the language in the field.** Some language that we use including “intermediary” or “re-granter” could be changed to reflect: the relationships we aspire to build more accurately; and the work that the ecosystem does (i.e., they build movements and coalitions, provide advocacy support, and conduct

research, often at the same time as providing grants).

- **Evolve existing roles.** Relationships should be tailored to local context and needs, with partnership, mutual respect, and horizontal collaboration at the centre of those relationships. This can create the space for healing and build trust.
- **Make conversations more meaningful through concrete action.** In addition, those who were interviewed in these studies have expressed fatigue in taking part in dialogues such as this. They have expressed an urgency in making these conversations more meaningful through concrete action that increase direct funding flows in support of Global South led and based organisations, innovation, and shared learning.
- **Focus on building shared values and principles.** These include the following: 1) power sharing and shifting to challenge and transform how power is held and used; 2) accountability to recognise our own institutions and selves as accountable to the organisations, activists, and movements we support; 3) collective care to ensure the safety and wellbeing of activists and the

sustainability of movements; 4) equity to deconstruct biases and address the root causes of injustice and inequality; and 5) adaptability and learning to recognise the importance of innovation, create space for candid feedback, and foster a culture of learning.

## Recommendations

Based on the research, the consultants recommended that funders work in the following ways:

### 1. Cultivate practice that centres communities and shifts power

The reports suggested that funders work to cultivate a practice that centres communities and shifts power.

This includes strategies that:

- Support systems changes and shift from siloed to cross-sectoral approaches. Many of the groups work at the intersection of conservation, climate, nature, human rights, and gender equality. This is due to nature of the lived experiences and the socio, economic, and political



history of the regions. Centring justice and equity is a common thread.

- Pay greater attention to the range of roles, opportunities, and benefits within the entire ecosystem.
- Experiment and co-learn around innovations, which builds trust and evolves ways of working.
- Support collaborative leadership and horizontal relationships.
- Make funding and accountability mechanisms more agile with distributed decision making in governance.
- Invest in and build mutual trust and respect.

## **2. Grow and enable a new generation of partners**

The reports indicate several ways to ensure the ecosystem can be resilient and thrive to create positive and deep lasting impact. Ideas include:

- Invite concept notes and co-design programmes with constituency-led partners.
- Incubate and grow sub-regional or national funds, and regional networks.
- Amplify learning on emerging operating models.

## **3. Invest and engage the ecosystem for lasting impact**

The reports suggest that investments are made in greater collaboration across the ecosystem to enable funders to better understand the changes that may emerge in the philanthropic field. The reports indicated that funders should ensure that our strategies:

- Provide **more core and flexible funding**, and improve the **speed of grant-making**.
- Invest in developing relationships and capabilities, as well as infrastructure (e.g., the financial and grant-management IT systems needed to manage grants).
- Structure relationships in ways that contribute to movement building and strengthening the diversity and capacity of sub-grantees.
- Bring together unusual allies as equals.
- Cultivate platforms for learning and strengthening.
- Create opportunities for pilots and experiments.
- Work together on joint advocacy and communications strategies and tools.
- Build relational styles of leadership.
- Nurture the power of networks.

## Call to action

In summary, while the recommendations and discussions will continue to evolve, the invitation is for the philanthropic community to:

1. Recognise and respect that **there is an existing robust ecosystem of networks, movements, and "intermediary" partners** with aspirations for expansion and in need of support in their self-strengthening journey.
2. **Fund in flexible ways** to allow the field to remain authentically led and rooted in local realities.
3. **Commit to greater horizontal collaboration**, so that collectively we can sharpen approaches and tactics, leading to accelerated effort and lasting impacts.