

Philanthropy and the SDGs

Engaging Brazilian Social Private Investment in the Global Development Agenda





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Foreword

Marcos Athias Neto

Director, Istanbul International Center for Private Sector in Development

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From 1999 to 2013, the number of people who are living below the extreme poverty line has decreased by more than half.¹ The number of undernourished people across the globe decreased from 930 million in the beginning of 2000s to around 793 million in the last three years.² Similarly, the number of children out of school has decreased by nearly half, from 100 million in 2000 to approximately 57 million in 2015.³

Yet we live in times of great uncertainty and upheavals. Daunting and complex challenges affect us in all parts of the world. Flooding of coastal cities have been on a dramatic rise due to climate change. The income inequalities have exploded over the last decade, both within and between countries. Numbers of people that go to bed hungry every day are estimated at 850 million in 2016, 40 million more than the year before. The list goes on.

The Sustainable Development Goals (SDGs) is the world to do list for people and planet, capable of ending poverty, protect the planet, and ensure prosperity for all. Agenda 2030 has given the world a common language to see how we can transform our societies and a sense of urgency.

However, it is clear that this ambitious and comprehensive agenda can only be achieved with radically new ways of doing things. Only by collaborating and bringing diverse people together to analyze old problems through new lenses, which break away siloes and combine our collective capabilities, we can create smart solutions to realize the promises of Agenda 2030. For the SDGs

to be reached, everyone needs to do their part: governments, the private sector, civil society, academia, philanthropy and citizenry.

This report *Philanthropy and the SDGs: Engaging Brazilian social private investment in the global development agenda* demonstrates the vibrancy of Brazilian philanthropy, towards its contribution to the SDGs. It illustrates how SDGs can advance the philanthropic field by driving transformative partnerships, when new ideas and perspectives are combined and enhance overall impact. The data paints a picture that foundations and institutes grant-making is significant, but the many other contribution that the philanthropic sector brings to the table. The diversity of actors in the field, from private giving, to corporate foundations, and social investors offer many different approaches: from grant-making to social impact investing, across Brazil. A large majority of philanthropic organizations in Brazil are aware and see value in aligning strategies with the goals, this is positive going forward.

The decisions we take collectively over the next few years will have a big impact on the rate of progress towards the SDGs. This report is a powerful tool which should be carried out on continuous basis to monitor the collective progress and contributions of Brazilian philanthropy towards achieving of Agenda 2030. It has to be said that we are the first generation in history that can eradicate poverty, while at the same time the last generation that can avoid the worst consequences of climate change. Let's just do it!

¹ UN 2017. SDG Report 2017

<https://unstats.un.org/sdgs/files/report/2017/TheSustainableDevelopmentGoalsReport2017.pdf>

² *ibid*

³ UN 2015. MDG Report 2015 [http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20\(July%201\).pdf](http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20(July%201).pdf)

Foreword

Niky Fabianic

Resident Representative

United Nations Development Programme in Brazil

In 2015, Agenda 2030 and its Sustainable Development Goals were approved by the United Nations 193 Member States. At that time, the countdown began for reaching the 17 SDGs and its 169 goals. Next September, when this new Global Agenda completes three years, we will have 12 years to transform the world through inclusive and sustainable development.

For this, the commitment of each and every one is indispensable. From Heads of State to heads of household, everyone has a commitment to the future of this planet. This means involving regions, countries, federal units, municipalities, communities, neighborhoods, families, citizens and citizens in this global project. But how to do this in relatively so short time? Although we are not starting from scratch - thanks to the progress made with the implementation of the Millennium Development Agenda and its Millennium Development Goals, the MDGs - we now have an even more ambitious plan.

This is where the relevance of the theme proposed by the Philanthropy Platform in Brazil is highlighted, as part of the SDG Philanthropy Platform global initiative, which results in this publication. There is a need to move forward in the debate on how to create conditions for implementing and expanding funding mechanisms. It is not by chance that one SDG, 17, deals exactly with partnerships and means of implementation.

After all, what does it mean? The idea of "means of implementation" includes the interdependence of elements such as: financial resources, technology development and transfer, capacity building, inclusive and equitable trade and globalization, regional integration, as well as the creation of a national environment conducive

to the implementation of this new agenda, especially in developing countries.

In this sense, a renewed and strengthened global partnership to mobilize the means of implementation should consider:

- Treating, in an integrated way, the social, economic and environmental dimensions, pillars of the new agenda;
- Building on existing governance commitments and structures to ensure that new initiatives reinforce previous successful experiences;
- Raising funds in diversified ways;
- Strengthening governance and accountability, involving multiple actors, including those in the finance, technology, innovation and diffusion sectors, as well as capacity building for institutions and individuals.

In short, the new Global Agenda requires a holistic, integrated and transversal approach, not only in terms of understanding its objectives, but also and especially in providing resources for its implementation. As is well known, public and private resources need not be exclusive. Partnerships, however, to succeed, require planning, alignment, and consensus-building. Otherwise, they can generate fragmentation and waste of investments. The identification of synergies is therefore fundamental.

This is also true, of course, when adding internal and external resources. After all, the multiplicity of funds can also represent an environment of high complexity and inefficiency, resulting in less and less funding sources. Not infrequently, multiplicity means, again, fragmentation. Here the role of coordination and

governance is of fundamental importance to orchestrate and optimize efforts and initiatives.

If, at the national level, there are new challenges, what about the subnational scope? The proper implementation of Agenda 2030 - which has as its motto "to leave no one behind" - involves its location, that is, solutions must be identified considering different realities. Thus, the sustainable development process must be "localized", that is, appropriate to each location. "Location" means considering different sub-national contexts in the implementation of Agenda 2030, from setting goals and targets to determining the means of implementation, as well as using indicators to measure and monitor its progress.

Location refers both to how local and regional governments can support the implementation of SDGs through "bottom-up" actions, and how SDGs can provide a framework for a local development policy.

In a country like Brazil, where a significant part of the responsibility for public welfare is from states and municipalities, the national challenge is repeated at the subnational level. It is in this context that the projects and programs developed by philanthropic organizations and supported by private social investment are also located.

As a result, UNDP has been active in developing actions to enhance the location of SDGs, offering its national and international expertise, to maximize the efforts of foundations and institutes, governments, investors and civil society.

I reiterate my deep satisfaction at seeing a growing articulation involving foundations, Governments, private sector and civil society, to strengthen efforts and find joint solutions to accelerate the implementation of this agenda in Brazil. The commitment of these actors will contribute immensely to Brazil's success in reaching the SDGs. We count on you. We know it is possible.

Introduction

The Growing Role for Brazilian Philanthropy in the Global Goals

Thanks to the combined efforts of governments, business, civil society, academia and increasingly- philanthropy - the Sustainable Development Goals (SDGs) have become the DNA of global development. The 17 goals and 169 targets offer a unified vision of sustainable development for the world – it is universal, applicable to all countries in the world and a result of the biggest outreach and consultation effort in the UN's history.

Large and small companies have started aligning their strategies to the SDGs. For example, Medtronic, a global healthcare company and co-founder of Impact2030, a global business network promoting corporate volunteering for the SDGs, has pledged to engage its workforce of 85,000 employees globally in efforts on the SDGs. Companies such as Unilever, a fast-moving consumer products giant, the SDGs present an opportunity to expand its business to new markets and consumers.

Furthermore, the business community has already attempted to estimate the business opportunities stemming from adopting the SDGs. The Business and Sustainable Development Commission's recent report advocates that adopting the SDGs will unlock market opportunities worth US\$12 trillion of new market value available to businesses that align with the Global Goals.

Civil society has been among the first to advocate for the goals and plan the implementation. SDG Action Campaign or Beyond 2015 illustrate hundreds of CSO networks spanning multiple countries collaborating to tackle a wide range of issues. For example, recently civil society organizations have joined hands with the

government, the private sector and academia to launch an SDG multi-stakeholder platform for partnerships to accelerate implementation of the SDGs in Ghana.

Philanthropy has recently started to embrace the SDGs. There has been an emergence of philanthropy as well as impact investing networks that promote and align efforts to the goals.

The SDG Philanthropy Platform (SDGPP or the Platform) is a global initiative that builds philanthropy's leadership for the SDGs. To date, the Platform has brought together over a thousand philanthropists across various countries to facilitate effective collaboration so that together, funding and programmes have a greater and more sustainable impact on people's lives. Also, SDGPP has established pathways to engage philanthropy in the national SDG planning and implementation in 8 pilot countries, namely Brazil the eighth country to join-following Colombia, Ghana, India, Indonesia, Kenya, the USA and Zambia. The Platform is led by the United Nations Development Programme (UNDP) and Rockefeller Philanthropy Advisors (RPA) and funded by the Conrad N. Hilton Foundation, Ford Foundation, Brach Family Charitable Foundation, and UN Foundation.

We have discovered a thriving and diverse local philanthropy in the countries where we are working in. Economic growth has resulted in wealth creation, of which some resources are now being directed to support social change. However, data about philanthropic activities in these countries is scarce, which makes it difficult to assess the contributions of the sector to the SDGs. This is where our Platform and our partners step in. AFE, for example, a Colombian network for foundations

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Marcos Athias Neto - Director, Istanbul International Center for Private Sector in Development, United Nations Development Programme.

and our implementing partner, has developed MAPA, a tool that maps over 1700 projects of AFE's members filtered against SDG goals and targets. MAPA not only dramatically increases transparency of the sector but is also an excellent vehicle for knowledge sharing and collaboration.

In 2014, over 173 local philanthropic organizations in Brazil, including corporate foundations, community foundations, family and individual business leaders' foundations directed 3 billion reais to implement programs and projects. If added up with the results of corporate social investment, the total volume invested by Brazilian social investors in that year reached 3.9 billion reais.

Philanthropy definitely has the financial resources but should not be viewed as an "ATM for the SDGs", as it is not just the financial resources of philanthropy that makes the difference but also their unique way of approaching the challenges. Philanthropy brings a determined focus on outcomes and a commitment to innovation through experimentation and testing. Moreover, local foundations well anchored in countries have unique knowledge and generate insights on local contexts and ideas regarding how to overcome barriers.

The SDGPP's impact model is based on a belief that large scale challenges posed by the SDGs can only be solved using systems approach and large scale and high impact partnerships can shift systems towards positive sustainable development outcomes. Our unique collaborative model is based on three core pillars: mobilizing philanthropy; co-creating collaborative pathways, where philanthropy comes together with other stakeholders to analyze root out causes rather than symptoms of social problems; and catalyzing capital using approaches such as innovation challenges or impact investing. The systems change approach identifies SDG interventions that accelerate progress towards the SDGs and drives lasting change beyond what any individual development partners can do alone. For example, in Kenya, we connect philanthropy with other social change leaders working in early childhood education to develop, support and invest in solutions which can be scaled.

The Brazilian SDG Philanthropy Platform provides a space and voice for the foundations to share their perspectives in policy discussions on the SDGs with government and other social change-makers. The group of six foundations have initiated a workshop which was attended by over 30 organizations from civil society, social enterprises and the government to identify large ticket SDG related collaboration opportunities using systems approach. Another objective for the Brazilian network is to develop an innovative data sharing solution which foundations can use to enhance the transparency of the sector on the SDGs and learn from each other.

Moving forward, the SDG Philanthropy Platform powered by UNDP, an organization present in 177 countries worldwide, wants to expand to all interested countries, leveraging the global UN networks, resources and leadership. The only way to achieve the SDGs will be if we all radically change the governance models away from silos towards a "whole-of- society-approach" with all hands-on deck. The SDGs should become our DNS as consumers, employees, employers and governments and others - are engaged and play our part. Partnership enable to overcome the complexity and interrelated nature of the goals and unlock finding innovative solutions.

The Platform has recently launched a new interactive portal – www.sdgphilanthropy.org – which serves as an SDG resource hub and a marketplace to support initiatives, and ideas for philanthropists, foundations, governments, the UN, and social innovators. By providing this online space to connect and collaborate with the philanthropic community under the shared mission of SDGs, we aim to reduce duplication of efforts and leverage resources, increase transparency, facilitate information-sharing, and highlight philanthropy's essential role in global implementation efforts.

A bold and visionary ownership of the Global Goals is key in this process. We are really delighted to have Brazilian philanthropists onboard to work together for global sustainable development.

About the 2030 Agenda and the SDGs in Brazil

Haroldo Machado Filho⁴

In September 2015, the 193 UN member states unanimously approved Agenda 2030 for Sustainable Development. It is an action plan for people, the planet, and for prosperity. It also seeks to strengthen universal peace with more freedom by the year 2030. Such a plan should be implemented through a collaborative partnership between all countries and all interested groups.⁵

The main pillar of the Agenda 2030 is the set of Sustainable Development Objectives, the SDGs, an integrated and indivisible set of 17 Goals and 169 Targets. Countries have a guide in the SDGs. They are the basis of the new international development agenda, which is much more comprehensive and ambitious than the Millennium Development Goals.

The core values of Agenda 2030 are:

- 1) **universality**, as it addresses global challenges that must be addressed by all countries, regardless of their development situation;
- 2) **integration**, because it understands the relevance of seeking approaches that can blend, in a balanced way, the three dimensions of sustainable development: economic, social and environmental;
- 3) and **"leaving no one behind"** because it aims to give visibility to the most disadvantaged and vulnerable groups.

Like everything new, the implementation of this agenda, as well as its guiding principles, presents important challenges. While the SDGs are global and universally applicable, they are strongly linked to policies and actions at the national, regional and local levels. And it must promote not only the role of government, but also representatives of the private sector, civil society organizations, academia, philanthropy, as well as citizens throughout the country, as active and implementing agents.

To achieve this bold proposal, it is essential that countries have strengthened governance mechanisms, enabling the implementation of the SDGs to be carried out in a joint and coordinated manner, involving diverse sectors of society engaged in achieving common goals. An important step in this direction in Brazil was the creation of the National Commission for the SDGs, which is composed of representatives of the federal, state and municipal governments, as well as civil society and the private sector.

However, the biggest challenge is for this agenda to become a concrete reality and transform people's lives in a pragmatic way.

The principle of "universality" of the agenda cannot be confused with "uniformity", for there is not one formula for development. It is essential to find suitable solutions for each situation, especially in a country with realities as diverse as Brazil. Therefore, it is essential that the sustainable development process is "localized". "Localization" is the process of considering the subnational contexts in the implementation of Agenda 2030, from setting goals and targets to determining the means of implementation, as well as the use of indicators to measure and monitor progress⁶. This will yield more effective results to impact the lives of citizens in those localities. Moreover, the autonomy of each country

⁴ Senior Advisor at the United Nations Development Program - UNDP / Brazil and co-chair of the Advisory Group for Agenda 2030 of the United Nations System in Brazil.

⁵ See the preamble to Agenda 2030 for Sustainable Development.

⁶ UN BRAZIL, "Roteiro para a Localização dos Objetivos de Desenvolvimento Sustentável: implementação e acompanhamento subnacional", p. 12.

should be respected in the development of national policies for sustained, inclusive and sustainable economic growth, particularly in developing countries, consistent with relevant international rules and commitments⁷.

The interconnections and integrated nature of the Sustainable Development Goals are of crucial importance. However, in most cases, both in the planning and execution of public policies, there are fragmented decision-making processes, institutions that face constant challenges of conflict of competencies and even duplicity of efforts among the various actors involved. In addition, the quest for "policy coherence" should not only consider the "here and now" of policies, but also the impacts of domestic policies and practices in other countries, and the degree to which policies address the interests of future generations⁸. This certainly adds another layer (s) of complexity to the search for an integrated view of the SDGs.

The search for integrated solutions can accelerate practical solutions and save time, as well as human and financial resources. This view requires that a "systemic thinking competence" be strengthened, that is, the ability to recognize and understand relationships; analyze complex systems; think how systems are embedded within different domains and different scales, and deal with uncertainty⁹.

The ambitious project of Agenda 2030 has as its main "motto" to "leave no one behind". However, everyone knows that there are still many people in the world who are far behind in terms of development - and many others who run the risk of falling behind from now on. It is vital to ensure the inclusion of those who have not benefited from the development efforts undertaken so far and to prevent more people from becoming socially excluded. It is, therefore, a question of reaching all people, regardless of nationality, gender, race, color, ethnicity, religion or any other condition, including sexual orientation and gender identity.

For this, it will be necessary to go "beyond the statistical averages", which conceal great inequalities. Agenda 2030 requires that the implementation of goals and targets be accompanied by indicators focused on measurable outcomes. These indicators will need to consider different national realities, capacities, and levels of development, as well as respect for national policies and priorities¹⁰.

But in order to formulate effective measures to combat inequalities and honor the "ethical call" of the Agenda, it is essential to improve the collection of indicators in relation to the availability of information on the disaggregation by federal, state, municipal, urban areas / rural), by sex / gender, race / color, age group, biome, etc., as well as elaborate observations on the need for this information when none exist and / or greater data disaggregation. The generation of disaggregated data to monitor the implementation of this Agenda will be a major challenge, not only for official statistical agencies but for all stakeholders.

Another major challenge for achieving this agenda relies in resources. Mobilizing resources from developing countries, innovative financing instruments and private sector contributions, as well as official development assistance and debt relief for certain countries, are important means of implementation. Agenda 2030, including the SDGs, can be achieved through a revitalized global partnership for sustainable development, supported by the concrete policies and actions set out in the final document of the Third International Conference on Financing for Development held in Addis Ababa, 13 on July 16, 2015¹¹.

But the Agenda offers not only challenges but also many opportunities.

⁷ See paragraph 21 of Agenda 2030 for Sustainable Development.

⁸ WORLD RESOURCES INSTITUTE, "Universality, Integration, and Policy Coherence for Sustainable Development", 2016.

⁹ UNESCO, "Educação para os Objetivos de Desenvolvimento Sustentável: objetivos de aprendizagem", 2017, p.10.

¹⁰ Programa das Nações Unidas para o Desenvolvimento (PNUD). "Acompanhando a agenda 2030 para o desenvolvimento sustentável: subsídios iniciais do Sistema das Nações Unidas no Brasil sobre a identificação de indicadores nacionais referentes aos objetivos de desenvolvimento sustentável." Programa das Nações Unidas para o Desenvolvimento. Brasília: PNUD, 2015. 250 p.

¹¹ See paragraph 40 of Agenda 2030 for Sustainable Development.

Addressing the challenges of the new agenda requires more collaboration across sectors, overcoming the compartmentalized view of different issues ("breaking silos") and greater transparency and effective follow-up of the implementation of the SDGs targets and indicators through quantitative and reliable data.

There has been significant progress in overcoming many development challenges. Over the last decade, hundreds of millions of people have left extreme poverty, but there is a risk of a few million falling into it. We can accelerate progress. It is crucial, for example, to ensure greater participation and empowerment of women in all sectors.

But there is the opportunity to make different choices: more sustainable forms of production and consumption; how one deals with other beings that inhabit this planet; how to live with others, in a more harmonious and inclusive way.

Agenda 2030 offers tremendous opportunities for the private sector, opportunities that go beyond financial resources, and promote capacity building for sustainability, data accessibility for development, technological innovation, and global partnerships.

The scope of the SDGs will depend on the capacity to make it a reality in the cities and regions where people live and work. The new Agenda 2030 should be the northern long-term planning of the country, states, and municipalities. This will allow Brazil to advance the implementation of the SDGs throughout the national territory and achieve concrete results.

The SDGs offer a powerful instrument of medium and long-term strategic planning, which, in turn, can lead to several gains, such as promoting the modernization of public management, based on new ways of articulating social control, accountability, transparency and joint formulation to achieve the Sustainable Development Goals.

Brazil was a reference in the implementation of the previous development agenda, the Millennium Development Goals (MDGs). The implementation of the MDGs brought a series of gains for Brazilian society. Because of this, expectations regarding this new agenda are high. Despite the difficulties the country is currently facing, it is expected that Brazil will continue to play a leading role in the international arena, maintaining its leadership in sustainable development, with a wide range of public policies, experiences and good practices to demonstrate and share with the other countries associated with the global SDGs agenda.





The SDG Philanthropy
Platform engaging
more deeply
in global-to-local goals

1. The SDG Philanthropy Platform – engaging more deeply in global-to-local goals

A small group of colleagues from UNDP, the Conrad N. Hilton Foundation, Ford Foundation, Rockefeller Philanthropy Advisors (RPA) and the Foundation Center came together in early 2014 to strategize about how to engage philanthropy in the successors to the MDGs, as the Sustainable Development Goals were still being negotiated. The initial partnerships were formalized into the SDG Philanthropy Platform, in which UNDP serves as the lead on country-level work, RPA brings in the philanthropy perspective and expertise, FC created the original data platform, and all facilitate a growing interest in multi-sectoral collaboration on the SDGs. Work initially launched at the global level and in original pilot countries (first in Kenya, Colombia and Indonesia) has grown to include about ten focus countries, including the US, and an expanding list of funder partners – not only the seed funders, the Hilton, Ford, and The MasterCard Foundations – but also the Brach Family Charitable Trust, E4Impact Foundation, Oak Foundation, UN Foundation, Global Fund for Women, and now consortia like the Ignite Philanthropy coalition. Focus countries now include Zambia, Ghana, India, Brazil, and the Middle East/North Africa region, and work is expanding each quarter.

This ambitious effort was launched with a clear recognition of major opportunities and obstacles in bringing philanthropy to the table of sustainable development frameworks. The Platform team has always believed that unless the fragmentation of social change programs is addressed, with collegial leadership and exceptional cooperation, our collective vision about a greater sector and better world will not be possible.

There is a profound and inseparable relationship between enabling the philanthropy and social investment sector to use resources wisely, and achieving the ambitious vision the 17 SDGs represent. An example is improving funders' capacities to make grants with more clarity on how individual projects support public agendas, and

improve public policies for disadvantaged groups. The vision of the Platform is the following:

- Encourage a shift in mindsets that mobilizing resources for achieving the goals individually and collectively is about financing and unlocking untapped resources (e.g., social finance and impact investments), not only traditional funding that has too often created dependencies, and about finding catalytic interventions that create larger ripple effects and real systems change.
- Demonstrate an approach in every country, and within thematic/sectoral areas, which emphasizes collaboratives and collective action rather than discrete, individualized relationships and giving patterns. There will be some standards in terms of methodology across countries but also responsiveness to local context.
- The Platform will lead by example in consistently bringing together unusual groupings of individuals and institutions who are committed to participatory, progressive change and risk-taking, while holding itself accountable for learning from mistakes and exchanging honestly with the broader field of actors.
- Recognizing the importance of local ownership, it is important to seek advice and direction from national staff and institutions who understand best their country contexts. Eventually the funding for the Platform in-country will come primarily from local resources. And at the same time, the Platform will seek out diverse perspectives in country, particularly from national and/or sub-national governments (depending on country context) and community-based organizations.
- Being that bridge from local to global, and respecting both state and non-state actors in

identifying problems and solutions, will continue to be a hallmark of the Platform.

- While the Platform will remain rooted in connecting the philanthropy sector with government and the UN system, as a unique leader in this space vis-à-vis the SDGs the Platform must be fully embraced by the business and civil society sectors as a collaborator.

In an expanding number of countries, the Platform serves as a model for partnership platforms that link clusters of organizations around SDGs as leverage and innovation points, which on the UN side are embedded within the UN country teams, appreciated and relied upon by all the UN agencies in country, and endorsed by the government. This is the true spirit of goal 17 on partnerships. And as social finance expands around the world, from impact investors, large institutional investors and other sources, the Platform will

incorporate a stronger link with that sector, and pave their path with governments and UN where there is hesitation.

The Platform's networks embody deep knowledge and research capacity, and approaches that are essential to reaching the goals, such as systems thinking and innovation. This makes it a strong partner in the planning and financial ecosystem of each country in which it is active, based on local context and opportunities. It can be a strong partner with the community of social entrepreneurs locally and globally – whether non-profits who embed significant scaling approaches in their work, social enterprises who meet social and environmental goals through market-based approaches, or hybrid organizations.

Finally, an enabling environment for the philanthropy sector and its partners is a north star for the work, as this is a pillar for achievement of, and accountability for, the SDGs.

SDG Philanthropy Platform in Brazil

In Brazil, SDG Philanthropy Platform was established by the end of 2016, under the coordination of a steering committee formed by a group of foundations and their partnering companies, philanthropy associations and support organizations with the support of UNDP country office. The Local Platform steering committee is composed of Fundação Roberto Marinho, TV Globo, Instituto C&A, Fundação Itaú Social, Itaú, Fundação Banco do Brasil and Instituto Sabin. The group is also formed by leading philanthropy associations and support organizations as GIFE, IDIS, Comunitas and WINGS.

This group founded the Brazilian Platform, as part of the global initiative, for connecting philanthropic foundations to data, knowledge, and networking. The initiative also works as an enabler for collaboration, leveraging resources, and communicating the impact that these organizations bring to sustainable development.

SDG Philanthropy Platform in Brazil is engaged with the following agenda:

1. Finding system leverage points in which philanthropic organizations and private social investment can help unlock bottlenecks in country's development.
2. Identifying SDGs accelerators for impact interventions.
3. Co-creating collaborative pathways for achieving the goals
4. Identifying opportunities for innovative investment models
5. Bridging the dialogue with government to enhance social impact
6. Monitoring and measuring the progress of collaborative initiatives

7. Scaling up successful solutions.

Steering committee members are strongly engaged in internalizing and reporting their projects and programs with the SDGs. Instituto C&A applies the SDGs as a parameter to measure impact in their initiatives. GIFE inserted this agenda in the organization strategic planning using it as a framework in their data tools to monitor the outputs of social investments made by its members.

In addition, the group is committed with communicating the SDGs to the Brazilian population transforming it in a national agenda. As a result, a national campaign on SDGs is being conveyed by Fundação Roberto Marinho, TV Globo, an important Brazilian open commercial television

network reaching approximately 100.000 people, and the UN.¹² Two of the major local private investment networks are convening SDGs to their members at IDIS Forum, with the facilitation of Instituto Sabin, and at GIFE Congress. Moreover, initiatives currently developed by Fundação Banco do Brasil with UNDP, Itaú with the UN Global Compact Brazil Network and Comunitas on disseminating the SDGs have also strengthened this group capacity in the 2030 agenda.

Achieving the SDGs requires unprecedented collaboration and innovative interventions. Adding on this perspective, SDGPP in Brazil creates strategic alignment around collective outcomes, building on an ecosystem of collaborators and system thinking to drive innovation and find solutions to development outcomes.



Figure 1. Brazil Philanthropy Platform Steering Committee and strategic partners

¹² Video available at: <https://www.youtube.com/watch?v=0cVw3aXtC50>.

2

Trends and Comparative Analysis of Brazilian private social investment

2. Trends and Comparative Analysis of Brazilian private social investment

Heather Grady¹³

Brazil has always been both a leader, an originator, and a landing point for global trends and movements, whether political, economic, or social. A key country not only within the Americas but globally, the world watches Brazil to spot lessons, conundrums, and opportunities. This makes what happens in Brazil vis-à-vis the SDGs very important. Will the state allow non-state actors a place at the table? Will business and philanthropy find it important to engage with the SDGs? Will Brazilian civil society and social entrepreneurs, who have catalyzed global movements, take up the SDGs in addition to their own internal frameworks and theories of change? Will all these actors perceive and appreciate the differences between the SDGs compared to the previous MDG goals and processes?

The perspectives authors share in this publication, as well as the surveys and scanning done that feed into them, provide an encouraging 'yes' to the questions above. Brazilian philanthropy, business, and civil society are already making their stamp on how the SDGs are planned and implemented, and in turn, the country has a much greater chance of achieving most of these ambitious goals than it would otherwise.

The results from the survey that GIFE conducted with their members provides updated statistical information on the sector, which GIFE's Executive Director Jose Marcelo Zacchi writes about so cogently in the following article. To those less directly involved in, or knowledgeable about, the landscape of private social investment in Brazil, the survey provides a wealth of information. There are some confirmations of what one might expect

but also some surprises, and some data points indicate imperatives to be followed.

Private social investment of GIFE members was significant in 2016, at about \$830 million. Yet given the wealth of many business and other leaders in the country, the generosity is not as great as needed or expected. Interestingly, investments through tax incentives were trending downward significantly. Both of these data points lead to the importance of reforming and improving the fiscal incentives for philanthropy in Brazil. Work in-country and exchange between countries on what works is something the philanthropy sector might support in 2018.

Another point - that the amounts provided per GIFE member organization are significant by donor - is important. Almost half invested more than \$1.7 million in 2016. This means that the resources per donor warrant a very strategic and high-impact approach, as well as the ability to include in these portfolios both grants to others and, if desired, operational programming. Here, the numbers indicate a trend toward funding oneself rather than others - but for foundations, the missed opportunity here is the high value in investing in others to do what they do best -- in other words, to support a set of organizations who each dive deeply into their own specialty, leaving the role of the funder to construct a complementary portfolio of different organizations and activities that is focused on a coherent goal.

Related to this is addressing the surprising finding that just 24% of GIFE members provided general operating support for civil society organizations. This is a topic very actively under discussion in the US philanthropy community, and

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in fact is one of the areas of study of a report my organization released recently called *Scaling Solutions toward Shifting Systems*.¹⁴ This analysis found that grantees and impact investees were far more likely to be able to scale their impact when their funders behaved differently – including providing more core support, less restrictions, and longer-term support. This was particularly relevant for trusted organizations who've been funded already, and particularly important for grantees who have the intent and interest to scale their work and engage in shifting the complex, adaptive systems in which problems sit – creating more sustained impact that the funders generally strive for. Encouragingly, the GIFE survey indicates that there is a lot of interest by funders in providing more and better support to their grantees, so this could be a fruitful avenue for learning and collaboration – and the 15-year SDG framework provides a jumping-off point for this.

Added to this, thinking through how there could be economies of scale – for example, philanthropic organizations sharing back-office or due diligence support while pushing more funding out to those organizations who understand and spend close to the problems being solved – could be an opportunity for the year ahead.

Not surprisingly, education was the priority issue area for the respondents, coming in at 84%. Youth development came next, with 60% of organizations funding this area. These are 'turnkey' sectors that enable broad-based development and growth. There was a cluster of themes that are funded by between 41 and 51% of respondents: arts and culture (51%), capacity building for CSOs (50%), community development (48%), environment (47%), employment (46%), sports and recreation (45%), human rights (43%), and social assistance (41%). This indicates as well that many organizations spread their efforts across a number of themes, so a question for further consideration is whether there is enough planning and collaboration between funders on the same thematic area, perhaps using the SDG framework

and taxonomy (the goals and the targets) as a guide.

Only 37% of funders support work in health; for comparison purposes, in the US this number is 61%. Social assistance support is also much higher in the US, with 65% of foundations supporting this area. While one might assume this is because in Brazil people consider these sectors the government's responsibility, it does not explain then why education is so popular. If it is because people see health and social assistance as government-led systems where interventions would be challenging, it begs the question of why education support provided by private resources is viewed differently, and whether those resources are often wasted because it is, ultimately, the system that needs to be shifted to better serve Brazilians.

A notable feature of giving in Brazil is that efforts are largely targeted to specific population groups and individuals, but unfortunately only a tiny proportion is focused on women and girls and/or racial or ethnic minorities. 2016 figures are 4% to women and girls and 2% to racial and ethnic minorities. Brazil is not alone in this – in many countries, too little is focused on the groups who need it most. But in the SDG period, where reducing inequalities and promoting gender equality each have their own goals, and where inequality targets and indicators are spread throughout other goals, this level of attention is going to have to be revisited. On the racial and ethnic minorities issue, for instance, given Brazil's educated professional class and the role that educational opportunities play in getting ahead in society, this dimension, and the persistence of discrimination, will need to be tackled as part of the SDG process. Private social investment can play an absolutely crucial role in piloting interventions to see what works and in pushing the government and business sectors to incorporate better policies based on race, ethnicity, and gender.

¹⁴ Rockefeller 2017. Available at: <http://www.rockpa.org/scaling-solutions/>

In terms of the SDGs, it is encouraging that a growing number of GIFE members are aware of, and have begun to engage with, the 17 SDGs. Similar to the US and other countries, corporate philanthropy is the early adopter sector, while others lag behind somewhat. There is the chance to catch up and strongly embrace the SDGs to scale one's own impact and leverage. Some more specific ideas on this are included in the final section of the report.

Finally, in terms of leadership, given how prevalent women are in the philanthropy sector, there are too few women in foundation board positions, and though there is no data on diversity in other ways (e.g., racial), one can assume a tiny proportion come from diverse racial backgrounds. Given the important decision-making role of boards, adjusting board composition to be much more representative of society in general is something for Brazilian organizations to consider.

Overview on private social investment in Brazil

*José Marcelo Zacchi*¹⁵

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Private Social Investment in Brazil stands out by the diversity of organizations that make up its universe, as well as by the diversity of forms and strategies of action, institutional profile, and size of these organizations.

This diverse set of organizations plays an important role in the democratic construction and sustainable development of the country. It is a group of actors that has been strengthened as agents of social transformation since redemocratization, not only for numerical growth but also for achieving, more and more, density in its performance, reinforcing the systematic, planned and monitored character of its actions.

Private social investment (PSI) thus offers important contributions in the creation and promotion of public solutions to common problems by providing direct assistance, developing methodologies, and providing articulation and advocacy, among other lines of action.

Social investors also play an important role in strengthening civil society organizations (CSOs) - although there is room for their action to be strengthened and broadened. And this not only for the financial and technical support they can offer directly to other CSOs but also to engage, disseminate and reinforce the importance of CSOs as an expression of fundamental democratic processes, and the building of sustainable development.

Knowing and understanding how social investors act and characterize themselves is fundamental to boosting this sector, expanding its impact, and enabling connections with other actors. Understanding this universe will also provide clues to understanding the PSI's performance and connection to the SDGs, as well

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as the possible contributions of the PSI to this agenda.¹⁷

To do this, in this chapter we give an overview of private social investment in Brazil, describing its main characteristics and pointing out some trends.

The first pathway to understanding the field of the PSI is to distinguish the different types of

organizations. It is possible to classify social investors based mainly on the source of their funding and their structure of governance: they can be companies or institutes and foundations set up in different institutional arrangements, as follows:

Institutes and foundations set up by communities: Non-profit organizations that pool resources from one or more organizations or individuals, generating a fund used for investments in a given community [or on a given theme]. They work in a community or a locality and are managed by people who identify themselves as belonging to that community.

Institutes and foundations set up by families: Non-profit organizations created and maintained by a family and managed directly or indirectly by their members.

Institutes and foundations set up by companies: Non-profit organizations created and maintained by a company or its shareholders. They are managed by people connected to the company.

Institutes and foundations set up independently: Non-profit organizations generally maintained by more than one organization or individuals. Their management is independent from those who maintain them.

There is a predominance in the GIFE network of institutes and foundations set up by companies, which represent 53% of the GIFE network and the Census respondents, but other types of investors are growing. It is important to highlight that institutes and foundations set up by companies represented 7% of the GIFE network in 2007 and now they represent 17%.

There is also a great volume of resources invested. Although 48% of the organizations invested up to R\$ 6 million in 2016, 23% invested R\$ 6 million to 20 million and 10% more than R\$ 50 million. It is important to note that there are large and small organizations, in terms of investment volume, among all types of

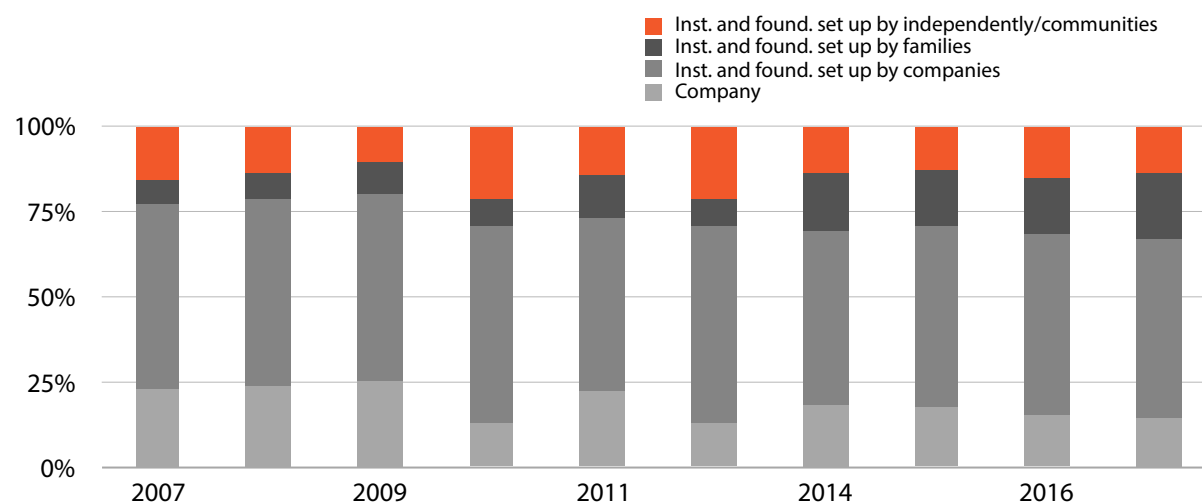


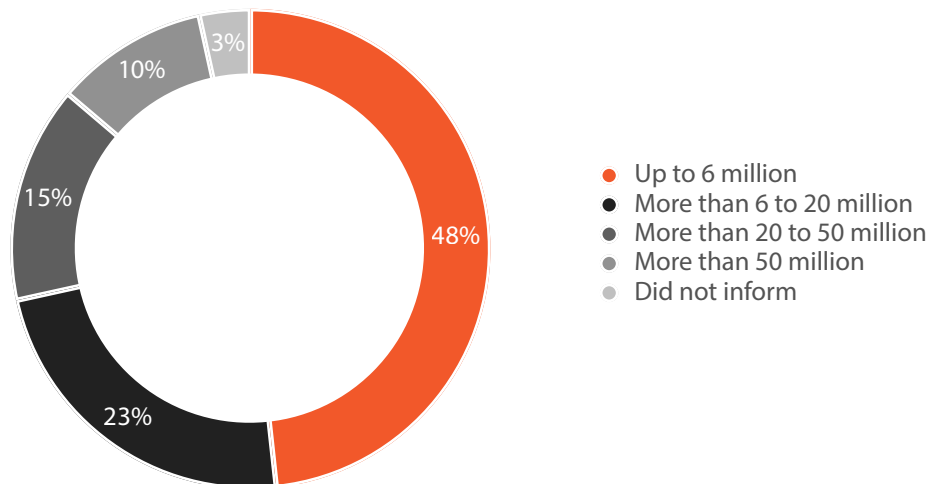
Figure 2. Organizations % by Investment Type

Source: Censo GIFE 2016, GIFE, 2017.

¹⁷ Data presented in this article refer to the GIFE 2016 Census, one of the main research on private social investment in Brazil. Conducted biennially by the GIFE, with its associates, since 2001, this eighth edition of the research has reached 90% participation and a total of 116 respondents.

investors. All of them have similar medians¹⁸ of investment, although the companies have the smallest medians (R\$ 4,144,456.00) and the Institutes and foundations set up independently or by communities have biggest median (R\$ 9,563,242.00). The median amount invested by Institutes and foundations set up by companies is R\$ 6,777,084.00. Meanwhile, the median investment is R\$ 5,076,497.00 for Institutes and foundations set up by families.

Figure 3. Organizations by Investment Range - 2016.



Source: GIFE Census 2016. GIFE, 2017.

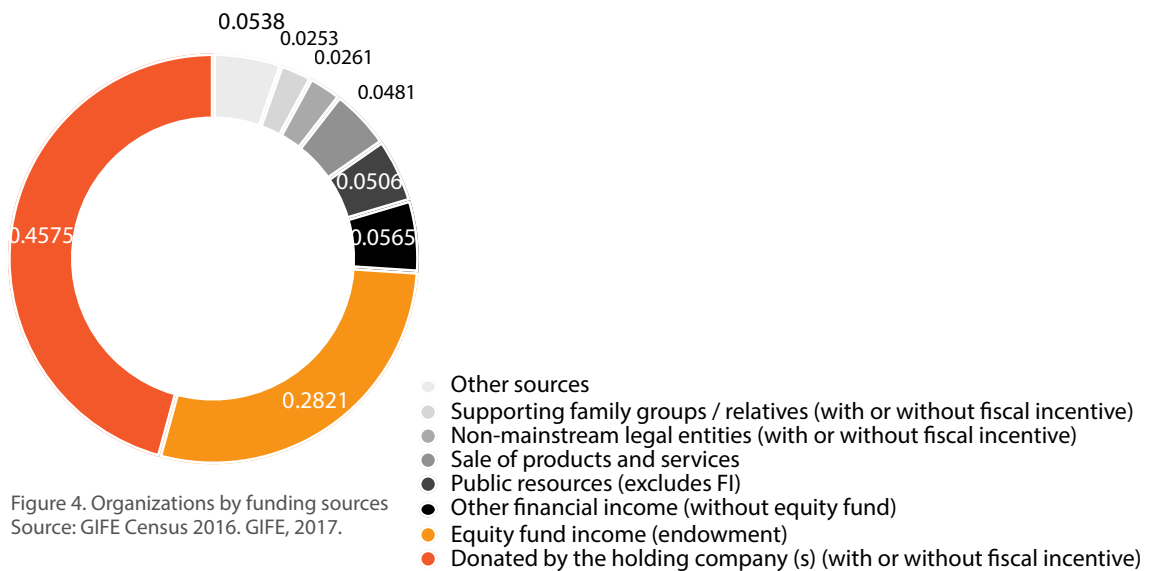
The total volume of resources invested in 2016 was R\$ 2.9 billion. This represents a decrease of 19% compared to 2014, in amounts updated by the IPCA in January 2017. This percentage rises to 26% when the basis of respondents is stabilized, that is, considering only the organizations that have responded the last two editions of the Census, the total funding for social investment fell by 26% from 2014 to 2016. This is a significant but not entirely surprising drop, given the economic scenario and the social crisis that the country has experienced in recent years that possibly affected the resources mobilization for social investment.

This assumption is strengthened when we observe that 46% of the volume of social investment come from donations from the holding companies. The second main source of funds is equity funds accounting for 28%, other financial

income appears in third place representing 6%. It is worth mentioning that organizations that have most of their resources from these sources do affect these percentages, but do not change the proportion between them.

The share of the resources in the total volume of investment varies considerably among the types of social investors. Institutes and foundations set up by families and, above all, the ones set up independently and by communities, have the greatest diversity of funding sources. In these two, an important point is the presence of equity funds, comprising 28% of the total volume of resources for these types of investors, followed by public resources with 28%. The funds raised through international philanthropy also have an important place, representing 11% of the total.

¹⁸The central point of a data set.



In addition, the organizations can be classified according to the way they operate, being predominantly executors, predominantly donors, or hybrids (organizations that donate and are operational). This classification considers two questions - budget distribution and strategies for action.

to increase the number of organizations that are predominantly executors and to reduce the number of the ones that are hybrids. In this edition of the Census, the predominantly executing organizations outnumber the hybrid organizations, representing 43% compared to 41% of hybrids. The predominantly donors have remained relatively stable and represent 16% of the respondents in the 2016 Census.

Observing the distribution of organizations according to this classification, there is a tendency

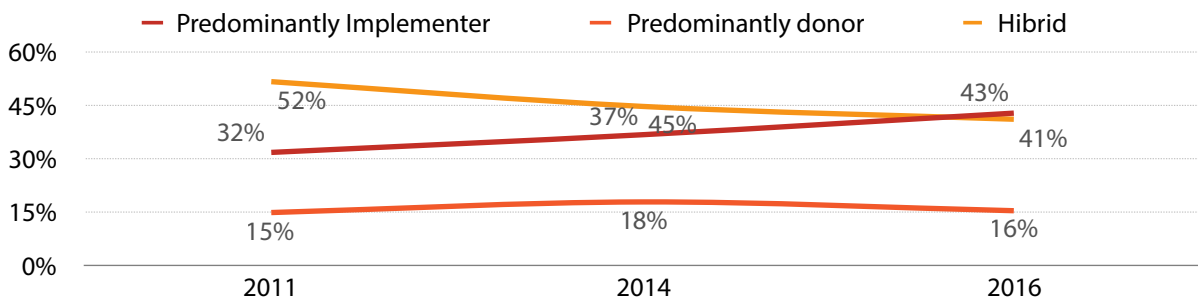


Figure 5. Organizations by operating model
Source: GIFE Census 2016. GIFE, 2017.

Regarding the budget distribution, there is also a tendency to reduce resources donated to third-party projects. Even though there is a large proportion of hybrid organizations, most of the resources are allocated to the execution of organization's own projects (60% in 2016).

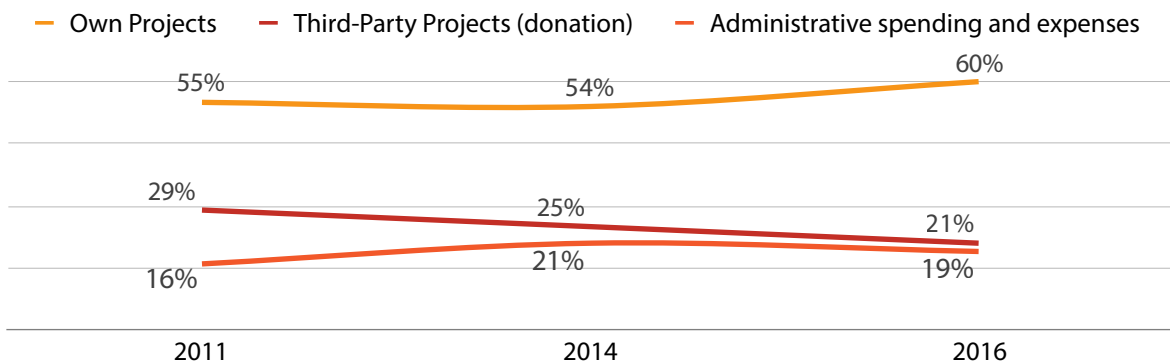


Figure 6. Expenses distribution by total budget
Source: GIFE Census 2016. GIFE, 2017.

Related to strategies for action, the organizations adopt a multiplicity of options, noticeable by the great presence of hybrid organizations. To support civil society organizations, social investors tend to focus on supporting projects through programmatic lines/open announcements, while institutional support unrelated to projects has decreased.

Table 1. Organizations Strategies for action (2014 – 2016)

		Organizations strategies for action	2014	2016
Support to CSOs	Supports, institutionally, civil society organizations (financial support unrelated to projects)		33%	24%
	Supports with financial and/or technical resources projects/programs from third parties, in pre-established programmatic lines		51%	58%
	Supports with financial and/or technical resources projects/programs of third parties through eventual donation/occasional sponsorship		50%	55%
Execution of its own projects	Enables financial and/or technical projects/programs developed by the associate itself, but executed by third parties		48%	51%
	Executes directly (with own team) projects / programs, developed by the associate (even with third-party advice)		80%	72%

Source: GIFE Census 2016. GIFE, 2017.

Although there is a downward trend in institutional support, and reductions in resources for CSOs in general, organizations seem to be valuing more the work of the CSOs and their importance. This trend is identified by a higher percentage of social investors who support CSOs because of their work advocating for causes or social groups that others are not willing to support (10% vs. 1% in 2014). Another reason lies in the belief that it is part of the social investment purpose to contribute to the strengthening and sustainability of CSOs - from 21% in 2014 to 35% in 2016.

Table 2. Reasons for Organizations to support CSOs – 2014-2016

Reasons for Organizations to support CSOs	2014	2016
Projects/programs rely on CSOs to operationalize and implement them in priority contexts/territories	67%	41%
It is part of the strategy to support organizations that advocate causes or social groups that others are not willing to support	1%	10%
It is part of the strategy to support organizations that have the legitimacy to work with themes or social groups of interest	65%	47%
It is part of the purpose of social investment to contribute to the strengthening and sustainability of CSOs	21%	35%
It is part of the strategy to support organizations that influence public policies or carry out social control	-	18%
Does not Support	11%	23%

Source: GIFE Census 2016. GIFE, 2017.

Several factors may contribute to this. The connection with the private sector's operation is present in a great segment of these organizations - even among family foundations, as many of them originated from business families. This fact generates the perception that these organizations would have the accumulated growth and expertise to operate directly more efficiently and effectively. At the same time, and connected with this perception, direct operation brings more certainty about the goals, indicators and results, creating more control that the project will be executed as planned and expected results will be achieved. In this context, donation can be perceived to be riskier. The decrease in budgets may also be related to this scenario in recent years. By having to reduce funding and possibly focus on their actions, organizations may have prioritized their own projects over donations.

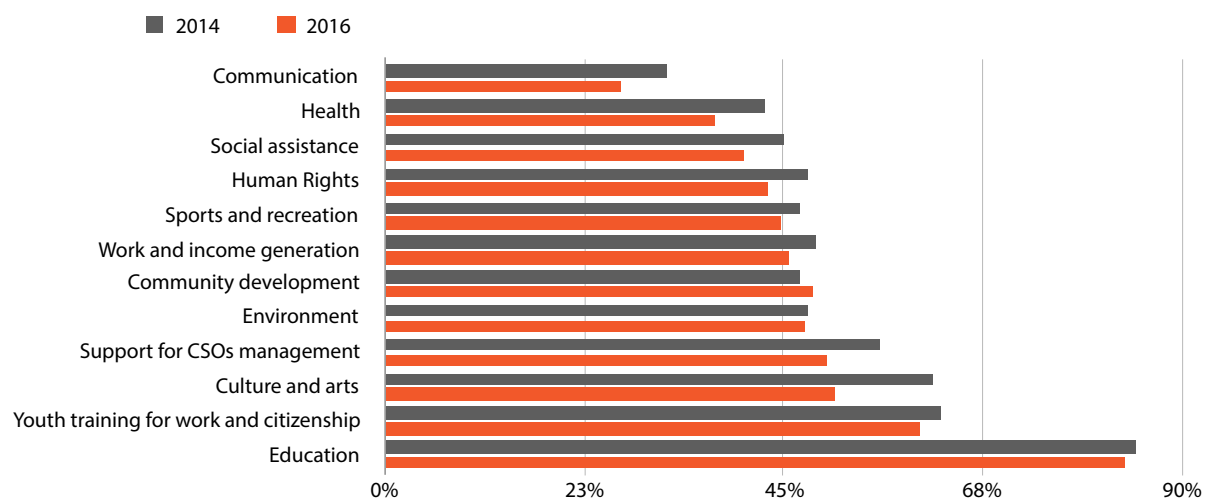
Still, it is important to point out that the boundaries between supporters and executors are

not clear, and there are different conceptions among social investors about what it is to support CSOs, collaborating with, or "hiring" the organization to operate their projects. At the same time, the non-reduction of donor organizations highlights that there is space and recognition on the relevance of this form of action.

The field in which they work is another important attribute in the characterization of social investors. Historically education has been the main thematic area; however, in recent years other themes have gained relevance. In this sense, we highlight the defense of human rights that grew 14 percentage points between 2009 and 2016; and sports and recreation that grew 13pps.

Between 2014 and 2016, the percentages of all areas of work were reduced, which may be an indication that the organizations are more focused. It may also be linked to budget cut and decrease in number of projects.

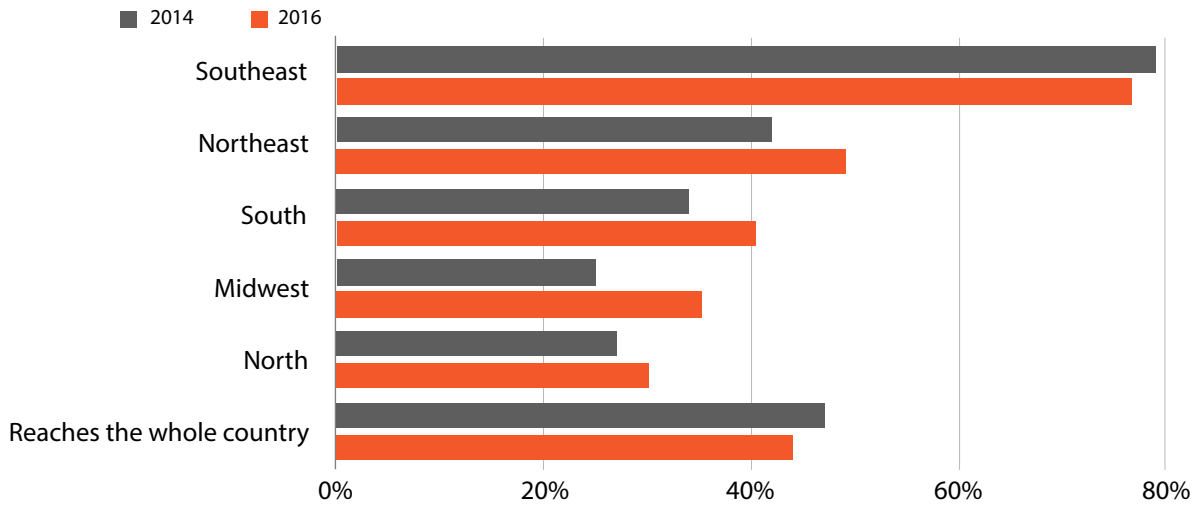
Figure 7. Organizations activity areas – 2014-2016



Source: GIFE Census 2016. GIFE, 2017.

In conclusion, when we analyze the geographical distribution of the organizations, it is possible to perceive a greater concentration in the Southeast, but with a tendency of better distribution among the other Brazilian regions. Among the types of social investors, institutes and foundations set up by families are those with the highest concentration in the Southeast (86%). It is also worth mentioning the large percentage of organizations that have projects that do not have a distinct or unique territorial focus, reaching the entire country. Moreover, organizations that have a defined territorial focus seem to have a more localized action, 86 of the 775 projects mapped in the Census occur in a single municipality and 61 in 2 to 5 municipalities.

Figure 8. Organizations by region (2014-2016)



Source: GIFE Census 2016. GIFE, 2017.

Considering these analyzes jointly, the fluidity of borders, the overlapping of roles and strategies, and the multiplicity of ways of work present in the universe of private social investment can be seen. Understanding this field requires identifying trends and patterns and, at the same time, leaving room to distinguish existing differences.

At the same time, this panorama reveals that there are, in line with the diversity of the PSI,

various paths, formats, and challenges that are posed to investors in the development of their actions. In this sense, the SDGs are an opportunity for the promotion, qualification, and structuring of private social investment in Brazil. The PSI, with these and other instruments, reinforces its importance and willingness to continue the pathway of broadening its impact, deepening its contribution for strengthening citizenship and development in the country.



Brazilian philanthropy and private social investment in the context of Latin American countries

Benjamin Bellegy¹⁹

Brazil is a fascinating country in many aspects, and its philanthropic landscape is no exception. As a global network of organizations supporting philanthropy headquartered in Brazil, WINGS is following closely new developments in Brazil's national philanthropic landscape.

As a new-comer, my view on the Brazilian philanthropic field is still that of an exterior and non-expert eye. But our global vision at WINGS may help to put in perspective a few characteristics that I have been able to observe since my arrival.

A non-restrictive but little incentive environment for philanthropy

Even before understanding the Brazilian philanthropy sector, one of the first aspects that struck me was that domestic philanthropy is almost entirely focusing its actions at the country level. This is very much related to the regulatory framework: tax-immune CSOs are not allowed to apply or donate their funds to destinations outside of Brazil according to the Brazilian Tax Code. This element is part of a much broader regulatory framework which must be improved for philanthropy to unleash its full potential. Brazil has its share of challenges that require strong philanthropic inputs - it is one of the most unequal countries in the world and it hosts the world's most important ecosystem for the future of our planet – which makes this question even more urgent.

This framework is not as a restrictive one, but it is one that gives minimal incentive. At the fiscal level, not only do donations not benefit from exemptions (except in some specific cases, or for projects selected by the government), but are obliged to a 4% tax. Philanthropic donations are

not differentiated from donations made for private purposes.

This discourages the philanthropic environment and limits the development of the foundation sectors that operate within. There are different cultural and historical reasons for this predicament, including the central role of the state in ensuring social services and the lack of trust in the CSOs sector (53% of distrust according to 2017 Edelman Trust Barometer, slightly higher than for companies with 52%).



Photography by Sambazon

Predominance of corporate philanthropy and other common regional characteristics

As in the rest of Latin America and most emerging-market economies worldwide, the philanthropy/private social investment sector relies mostly on corporate institutions. The membership of the national association of foundations, GIFE, highlights this clearly, with more than 70% of its membership comprising of corporations and corporate foundations.

Interestingly, family philanthropy seems to be developing. This is a trend that we also see in other Latin American countries.

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Let's keep this regional lens for a while and see how Brazil differs from or reflects its neighbor's philanthropic landscapes.

A background element that can surprise other foreigners like me is the fact that Brazil doesn't always seem to be fully considered as an integral part of Latin America. With little regional institutions to facilitate a sense of common identity, this 'continent in a continent' often seems to be looking more at partnerships and exchanges with the US, Europe or the BRICS than with the rest of the region. The recent Philanthropy Regional Meeting WINGS organized in Cartagena de Indias in partnership with AFE-Colombia however highlighted that there is much more in common, than there are gaps and differences. The appetite for regional collaboration which WINGS will continue to support, also reflects these similarities.

According to Rodrigo Villar, there are 5 main characteristics in Latin American philanthropy:

- lack of data that makes it challenging to know if the right challenges are being tackled;
- predominance of corporate philanthropy;
- predominance of operational foundations versus grantmaking;
- limited effort to support civil society;
- interest in articulation with the public sector but a limited incidence.

All these indeed characterize Brazilian philanthropy, with the exception, maybe, of data availability -- which although needs to be further developed -- is more advanced than in most other Latin American countries.

The question of the predominance of corporate philanthropy is an important question. As other philanthropy approaches, it is bringing a strong added-value: a particular attention to impact and evaluation which contributes to the fast professionalization of the sector, the potential with business alignment, the skills, expertise and in-kind assets that can leverage financial asset, etc. On the other hand, it can be delicate for corporations to associate their brands to issues that

can be seen as edgy, such as human rights, social justice or even environmental protection. Also, according to different researches in the region, corporate philanthropy is more likely to implement programs directly rather than supporting civil society organizations work, thus contributing to the fourth common characteristic highlighted at the Cartagena meeting: the need to better support civil society, building trust, and promoting transparency.

Other philanthropic approaches can play a complementary role and should be further developed to respond to the diverse social needs.

More particularly, like in many other regions of the world, community-led approaches to philanthropy are still very emerging: women's funds, indigenous philanthropy, black philanthropy, etc. It is nevertheless a dynamic and apparently growing field in Brazil. An organization such as Fundo Casa not only allows to reinforce sustainability and ownership of community work in Brazil, but also funds communities in 11 other Latin American countries, bringing a regional dimension which is rarely seen in the traditional philanthropy and private social investment field of the country - as mentioned above. The *Rede de Filantropia para a Justiça Social* (Philanthropy Network for Social Justice) links some of these funds and supports the growth of this field.

To address the different needs of society, different time scales, and different levels of change, a diversified and well supported philanthropic field is needed, ranging from corporate philanthropy to individual giving through family and community philanthropy. We hope thought-leaders in the field, networks and platforms, can continue to foster and encourage such a diversification and an increased effort to support civil society.

A growth in individual giving supported by dynamic new actors and initiatives

While in the United States giving represents 2% of the country's GDP (gross domestic product), in Brazil, it represents only 0.23% of the national

GDP.²⁰ But the trend seems to be growing, echoing one of the main tendencies we identify at the global level in WINGS' Report on the Global Landscape of Philanthropy to be published early 2018: technological developments (crowdfunding platforms, SMS giving, etc.) and growing middle class in emerging markets are boosting this trend worldwide.

In Brazil, recent efforts have been made by different organizations supporting philanthropy to encourage and accelerate this growth. I have been struck by a very interesting funding innovation involving a diverse group of Brazilian grant makers and support organizations: Fundo Bis, which is the first fund in Brazil – and possibly in the world – financing projects that foster a culture of giving in the country (to know more, read our article²¹). Other initiatives such as *Dia de Doar*, the Brazilian version of the global Giving Tuesday campaign, led by the Brazilian Association of Fundraisers - ABCR, contributes to strengthening this evolution.

The two main historical protagonists of philanthropy development in Brazil, the national foundations' association – GIFE - and IDIS - a support organization member of the Charities Aid Foundations Global Alliance - are being joined by new actors and initiatives that target the qualitative and quantitative development of private individual resources for social good.

Some next generation Brazilian philanthropists and field leaders carry a strategic vision that embraces not only a specific social issue, but also the question of how to develop philanthropy to leverage impact and sustain the work. I will quote two examples.

On the technological side, WeLight²² is a social business recently launched to link individual donors with verified CSOs. It works as an app that allows people to allocate a percentage of online expenses to CSOs of their choice.

Another example is the initiative of Instituto Betty e Jacob Lafer²³ that currently launched a network of human rights and social justice funders with the objective to encourage the higher middle-class to give to these causes which suffer from structural underfinancing. Taking advantage of the latest developments in behavioral psychology, neurology and communications, this initiative aims to grow available resources sustaining these crucial issues.



Photography by Kenia Ribeiro

A relatively well-developed infrastructure

These examples show that, despite the economic and political context, and even though the philanthropic sector is still relatively emerging, the Brazilian philanthropy scene is very dynamic and we can expect interesting developments on the mid-term and future.

Whether we are looking at individual giving or institutional philanthropy, support organizations are playing a key role in advocacy, advisory and awareness raising activities that create the conditions for philanthropy to thrive and better respond the needs of society.

In this regard, the Brazilian landscape shows a relatively well-developed infrastructure of networks, associations and support organizations, some of which I have already referred to. The examples mentioned above show this is a dynamic

²⁰ Source: Doação Brasil (2015) and McKinsey's *Effectiveness of Social Investments* (2008)

²¹ Article from WINGS' blog *Philanthropy in Focus: Brazilian philanthropy innovates to foster a culture of giving – Get to know Fundo BIS!*, September 2017 (<https://philanthropyinfocus.org/2017/09/28/5415/>)

²² The initiative as launched by Derek Brett Gallo, a young philanthropist.

²³ The initiative is led by Inês Mindlin Lafer.

and diverse field. Brazil is also one of the only four Latin American and Caribbean countries that have a formal national association of foundations representing, serving, leading and advocating for the field since 1995.

On the data side, there is an increasingly important amount of available resources. In 2016, IDIS launched the first in-depth national research looking at Individual Giving, and GIFE's census provides regular in-depth information about philanthropic practices in the country. A certain number of universities and academic centers, such as Fundação Getulio Vargas, are investigating the philanthropic field and contributing to building its understanding. It is nevertheless a sector in which further developments would be needed. So far, there exists no academic institution hosting a center or program with a primary focus on philanthropy which speaks to a possible need to create academic curricula to train next generations of philanthropy professionals and leaders.

Conclusion

Despite a challenging economic and political context, gaps in diversification and effectiveness of civil-society strengthening, the Brazilian philanthropy field is dynamic and has the assets to strengthen itself. Future development very much depends on the work of support organizations, in their advocacy work to improve the regulatory framework. Recent initiatives on endowments by IDIS or those of GIFE to address tax and other

regulatory issues with supported from the European Union should be followed with particular attention.

It will be critical that a growing number of Brazilian foundations and philanthropists understand the strategic importance of collectively building their field and investing in it. Efforts and investments from leaders in this field, such as Instituto Arapyau and Instituto C&A, should be followed and further developed. WINGS is committed to fostering conversations among funders and hope that Brazilian foundations will get engaged in it.

The fact that SDG 17 on Partnerships has been chosen by the SDG Philanthropy Platform participants, as well as the interest around this platform, show that there is a shared awareness of the importance of collaboration.

Of course, one could not end this article without mentioning the impact of the current economic, social and political crisis on the philanthropic landscape. It has obviously affected the field, whether it is because of the involvement of some important companies and families in corruption scandals, or more generally through the mistrust and divisions that this multifaceted crisis is aggravating within Brazilian society. But it is also striking to see the resilience of the civil society in action. The energy and dynamism that are visible both on the philanthropy and CSOs side give trust and let hope that the third sector will be essential in laying the foundations of the future that Brazilians are willing to reshape.





photography by Tiago Zenero

3

Agenda 2030 and the SDGs as an opportunity

3. Agenda 2030 and the SDGs as an opportunity

There has been a quiet paradigm shift happening in many countries around the world about who is responsible for creating the societies we want, and need, in the future. The Agenda 2030 and Sustainable Development Goals (SDGs) were set out and agreed by all governments in September 2015, and launched in 2016 – but even before then, civil society institutions, in particular, were pushing governments and the UN to be more inclusive in the process.

Whereas the Millennium Development Goals were fairly firmly the purview of governments and the UN system, all sectors of society in countries around the world feel ownership of the goals. State actors are still ultimately accountable, and must

remain so until 2030 – but every other sector now has a recognized seat at the table. Given the ambition and breadth of the goals, this is an essential ingredient for success. Added to non-profits, business, and academia, we now have the philanthropy and social finance sectors joining in to invest funds and expertise for progress. The SDG framework of goals and targets is increasingly seen as an accessible and logical framework, and a subset of them, resonate with individual institutions' priorities.

Brazil, even at a time of social, political, and economic crisis, has found in the goals a meaningful pathway forward to create a more inclusive, just, and prosperous society for all.

Private social investment alignment with SDGs in Brazil

Luciana Aguiar²⁴

Karolina Mzyk Callias²⁵

The new global development agenda, which aims to promote sustainable and inclusive development, calls for innovative arrangements in partnerships and new funding mechanisms to solve complex problems in a variety of different areas, such as education, health, gender equality, youth unemployment, poverty elimination, inequality reduction and biodiversity conservation. Philanthropic organizations have a vital role to play in each one of the 17 SDGs.

Foundations, for the most part, have worked independently of the international community to implement their programs and projects. Few have been involved in intergovernmental processes, even with 31 billion dollars contribution made by philanthropic institutions to the implementation of the Millennium Development Goals by 2015.

In Brazil, private social investors channeled approximately 3.9 billion reais to solve social and environmental problems, according to data collected in 2014 by the GIFE and BISC surveys. Despite the role played by private social investment, lack of data to measure hampers the recognition of systemic impact promoted by institutes and foundations.

In this sense, Agenda 2030 – by presenting a common vision for the future reflected in 17 sustainable development goals associated with indicators to be monitored - offers a great opportunity to foundations and institutes for bringing into light innovative solutions, communicating impact and collaborating on the new global development agenda.

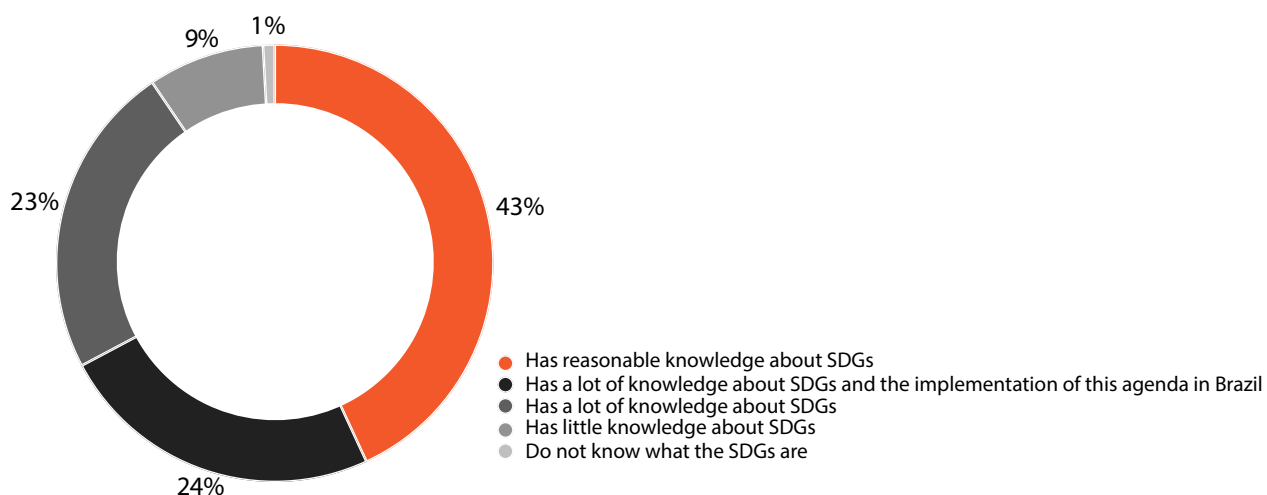
²⁴ Partnerships and Private Sector Manager at UNDP Brazil. Coordinates the implementation of the Brazilian Philanthropy Platform.

²⁵ Adviser on Philanthropy of UNDP. Coordinates the implementation of the SDG Philanthropy Platform worldwide.

To this end, the SDG Philanthropy Platform steering committee in Brazil, in partnership with GIFE, collected data from 116 organizations on the knowledge, perception and forms of action of Brazilian private social investment organizations about the SDGs. The outcome of this study, produced with data generated by GIFE 2016 Census, presents the challenges to broaden their

scope of action and existing opportunities to support the implementation of sustainable development in the country.

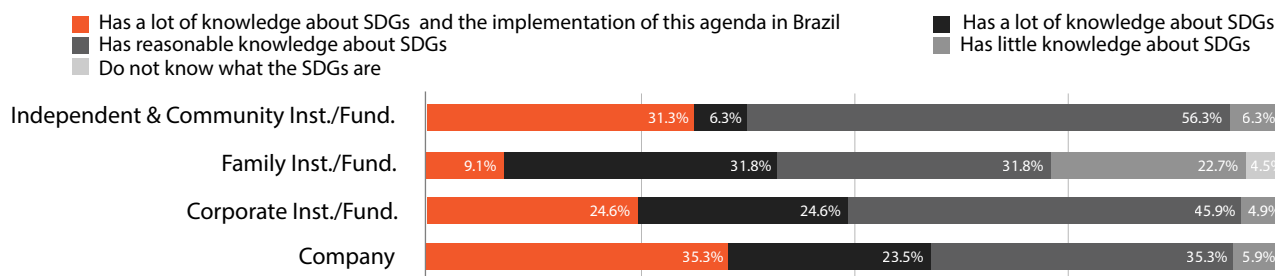
Knowledge about the SDGs is surprisingly high among private social investors, as 90% declare having a reasonable amount or a lot of knowledge about the SDGs and the implementation of this agenda in Brazil.



However, there is an imbalance in knowledge between different types of social investors. Business institutes and foundations know more about the SDGs and the implementation of this agenda in Brazil, while family institutes and foundations are less familiar with the SDGs.

Additionally, the higher the investment amount, the lower the knowledge about SDGs. Investors who know about the SDGs are mainly concentrated in the investment range of up to 6 million reais, followed by those that invest between 6 and 20 million. Investors who contribute with values above 50 million reais have less knowledge about the agenda.

Figure 10. Knowledge about the SDGs by Organization Type



Source: GIFE Census, 2017
Base: 116 respondents (P. 4.10)

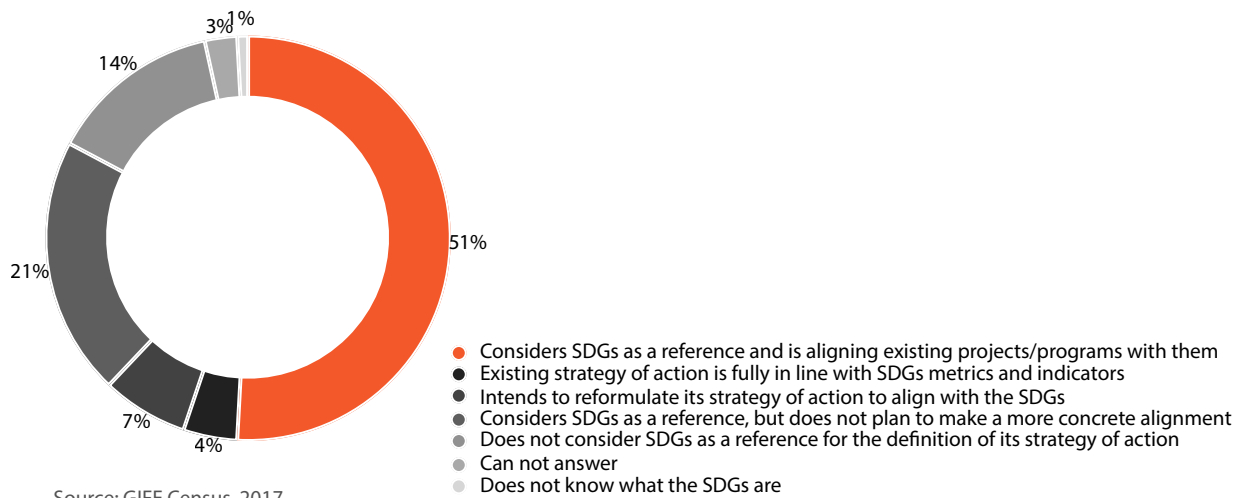
SDGs provide a reference taxonomy for aligning existing activities rather than a roadmap for identifying strategic development gaps

Social investors are open to considering SDGs as a reference to previous and ongoing activities within the SDGs. Half of the social investors consider SDGs as a reference for their programs and projects. However, there is an array of different grades for internalizing these goals in their models of action.

Despite this very positive scenario on the intentionality of social investors to apply SDGs as a

reference, a significant group does not necessarily intend to more concretely align their strategies with them (20%). Among these respondents, there is a greater proportion of family (31%) and independent or community institutes and foundations (25%) that do not plan to transform this framework into action. For this group, there is a possibility that the SDGs will only provide a taxonomy to classify ongoing projects and programs.

Figure 11. SDGs as a Reference for Defining Strategy for Action



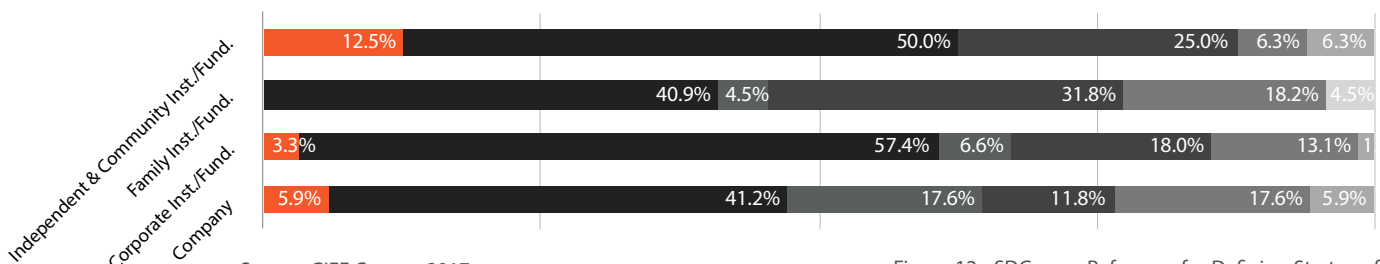
Source: GIFE Census, 2017
Base: 116 respondents (P. 4.10)

A significantly smaller number of investors (7%) plan to reformulate their strategies to have greater adherence to the SDGs. In this group, there is a greater proportion of corporations, companies (17%) and business institutes and foundations (6.6%). These investors tend to be more likely to engage with the SDGs as a theory of change, broadening the spectrum of challenges and

opportunities already mapped by their organizations for solving systemic problems.

Applying the SDG metrics and indicators for monitoring and measuring social impact is a new front for 96% social investors and an important step for integrating the outcomes generated by their programs into global development trends.

- Existing strategy of action is fully in line with SDGs metrics and indicators
- Intends to reformulate its strategy of action to align with the SDGs
- Considers SDGs as a reference and is aligning existing projects/programs with them
- Considers SDGs as a reference, but does not plan to make a more concrete alignment
- Does not consider SDGs as a reference for the definition of its strategy of action
- Can not answer
- Does not know what the SDGs are



Source: GIFE Census, 2017
Base: 116 respondents (P. 4.10)

Figure 12. SDGs as a Reference for Defining Strategy for Action by Organization Type

There is a synchrony in social investors' programmatic focus on social and economic development bottlenecks. Yet, there is still a gap to bridge on environment

Brazil occupies the 79th position in the Human Development Index (HDI) ranking, which measures the progress of a nation from three dimensions: income, health and education, among 188 countries and territories.²⁶ Education is the thematic area that has the greatest participation of private social investors in Brazil, particularly for its high potential for human development and reduction of inequalities.²⁷

Despite the significant investment made in education in Brazil, this area still presents significant challenges, especially regarding the quality of public education. Not surprisingly, the focus on quality education represented by SDG 4 stands out in 69% of the 17 objectives of sustainable development.

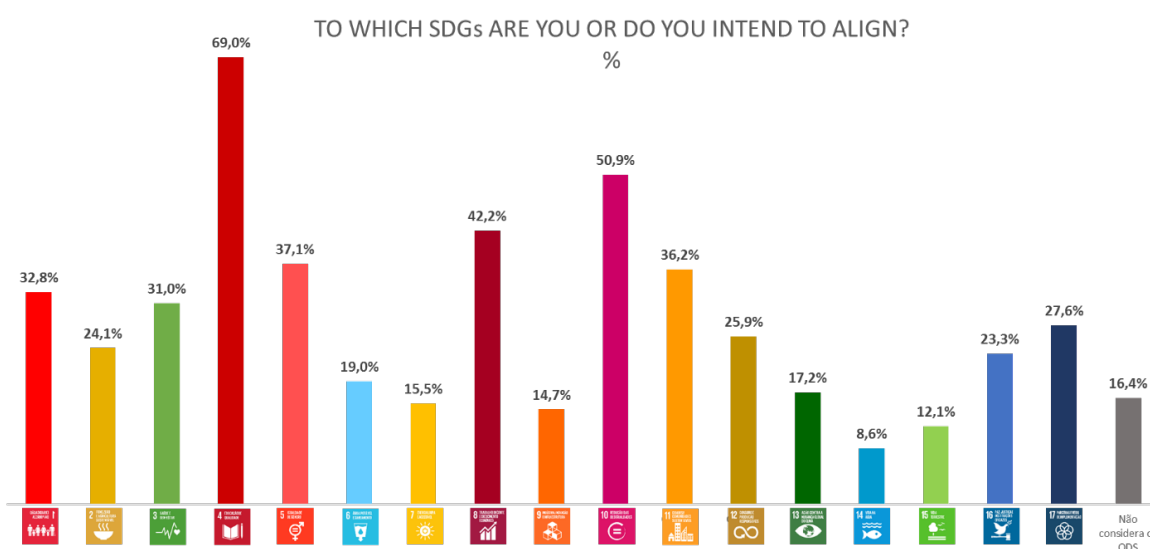


Figure 13. SDGs Addressed by Social Investors and Philanthropic Institutions

Source: GIFE Census, 2017
Base: 116 IM: 5,9

The second most relevant topic, pointed out by 51%, is SDG 10, aimed at reducing inequalities, a vital challenge that stands out in multiple dimensions of Brazilian society, in income, race, gender, extending to territorial and regional differences. This is followed by SDG 8, which relates

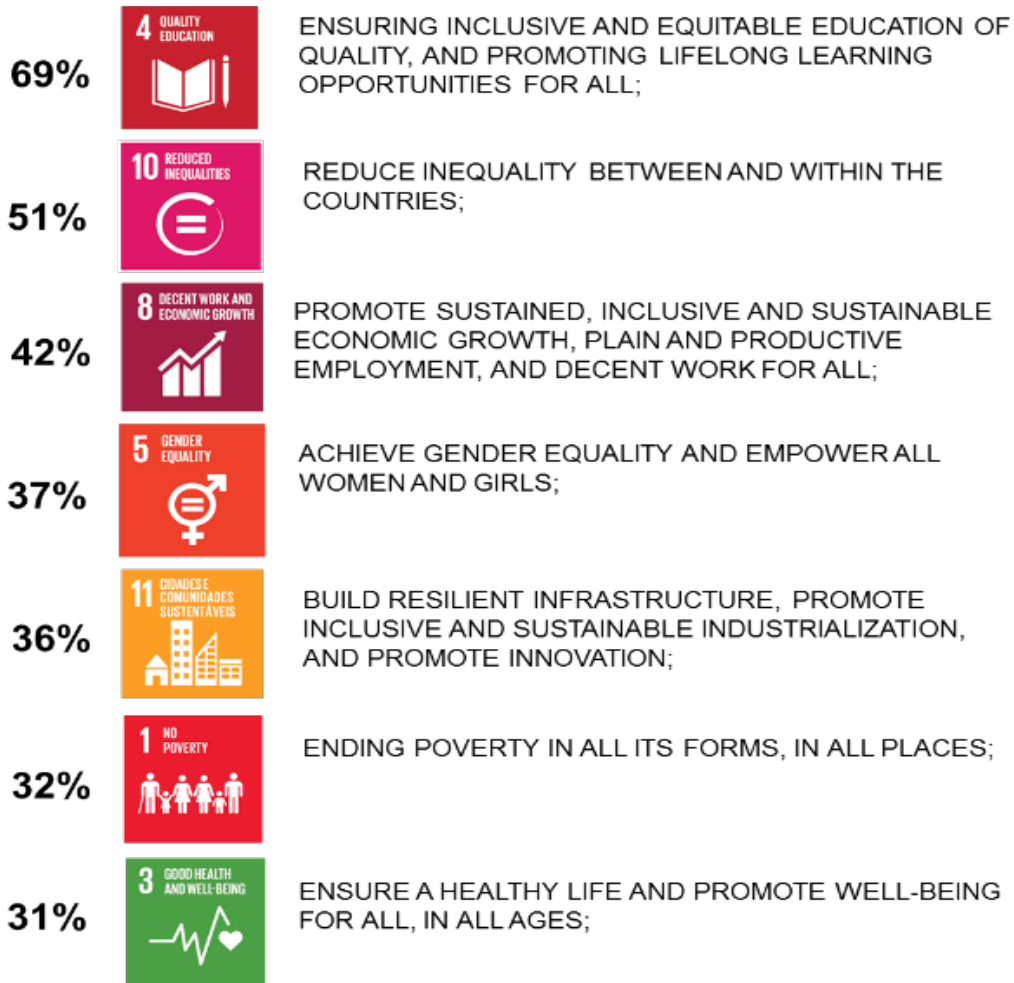
to decent work and economic development, a topic that directly lines up with corporate institutes' and foundations' action models.

On average, institutes and foundations mentioned approximately six SDGs related to their thematic areas which can be synthesized, in order of priority, as follows:

²⁶ UNDP 2016. *Relatório de Desenvolvimento Humano Regional de Progresso Multidimensional*.

²⁷ Censo GIFE, 2014. Ana Lúcia d'Império Lima. "A aposta do investimento social privado na educação."

Figure 14. Priority SDGs Addressed by Social Investors and Philanthropic Institutions



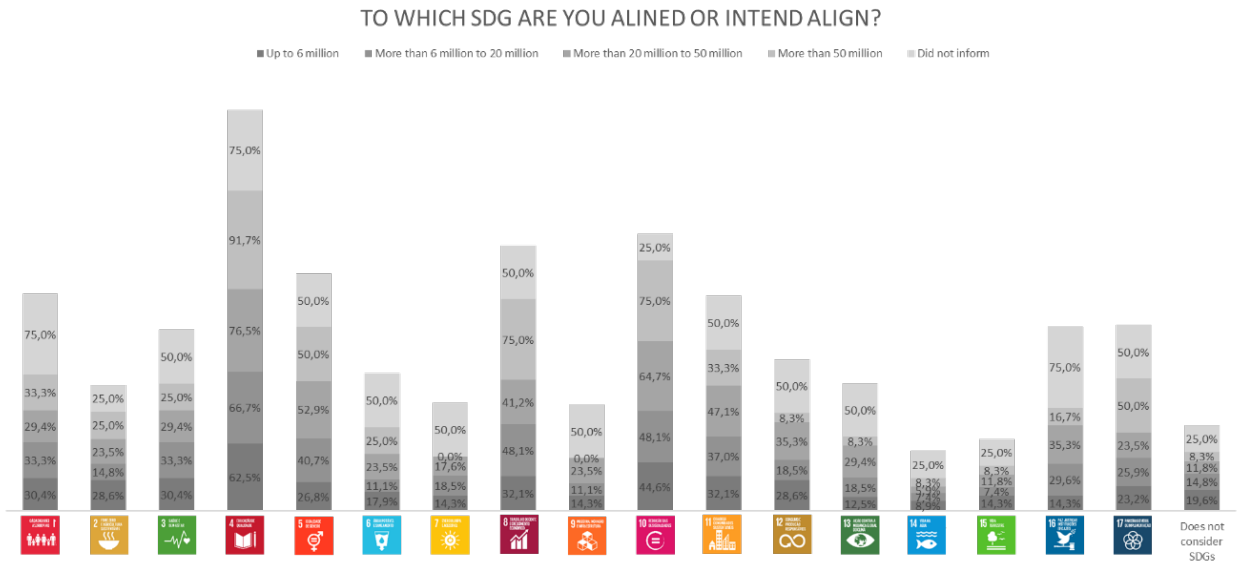
Topics less addressed by private social investment in Brazil are infrastructure and innovation (SDG 9), despite its impacts on cities and issues of economic growth and renewable energies (SDG 7).

There was also very low mention of two SDGs in the environmental area: one refers to terrestrial life (SDG 15) and another that refers to life in water

(SDG 14). Considering the Brazilian biodiversity, the extent of Brazilian coast and river systems, the traditional populations that depend on these ecosystems, and the direct and indirect impacts of these systems on climate change, this lack of attention seems contradictory.

Programs and projects in education (SDG 4), reduction of inequalities (SDG 10), and decent work and economic growth (SDG 8) receive the largest volume of investments, as illustrated in the following chart.

Figure 15. SDGs Addressed by Social Investors and Philanthropic Institutions by Investment Range



Source: GIFE Census 2017
Base: 116 IM: 3,2

Investments above 50 million reais are directed to these thematic areas followed by gender equality (SDG 5), and partnerships and means of implementation (SDG17).

Investments from 20 to 50 million reais are largest in sustainable cities and communities (SDG 11), sustainable consumption and production (SDG

12), followed by peace, justice and (SDG16), climate change (SDG 13), health and well-being (SDG 3) and poverty reduction (SDG1).

In investments, up to 6 million are concentrated on the important human development areas represented by SDGs 1, 2, 3, 11, 12 and 17.

Figure 16. SDGs by Investment Amount

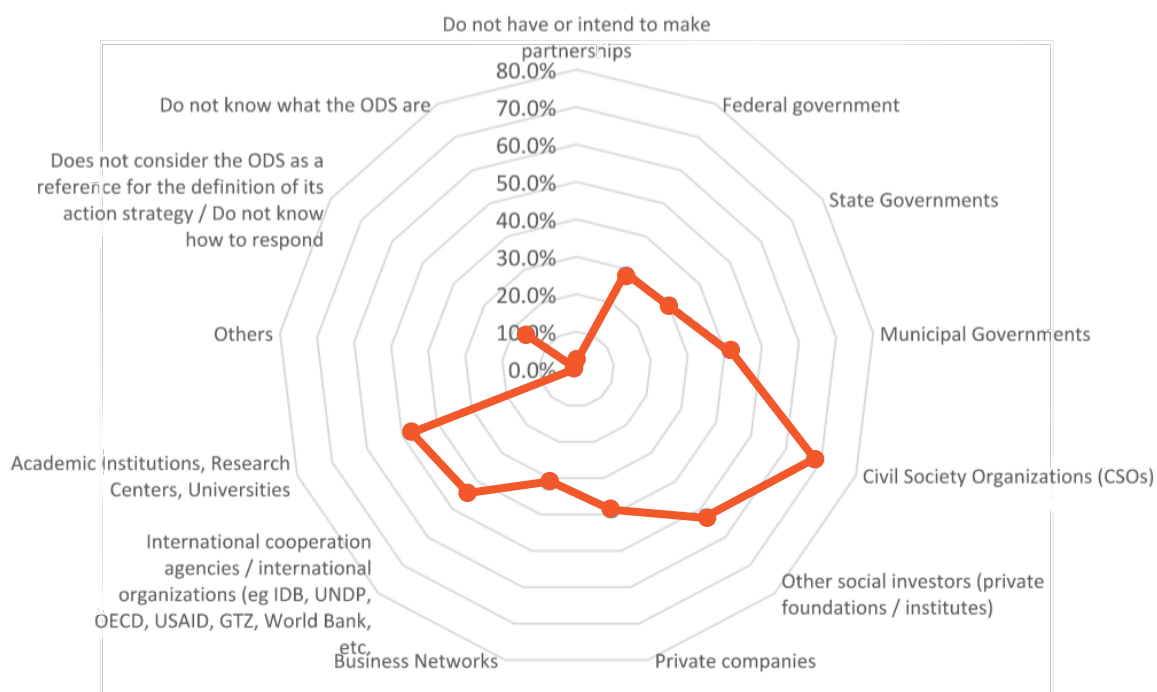


Collaboration with social organizations stands out among the partnerships for the implementation of the SDGs. Civil Society Organizations (CSOs) have played a vital role on

disseminating and territorializing the Millennium Development Goals in Brazil. Undoubtedly, the experience gained by these organizations will be instrumental in achieving the SDGs.

Civil society, other social private investors, academy and international cooperation stand out among the actors with whom foundations and institutes intend to establish partnerships to implement the SDGs

Figure 17. Partner(s) Engaged with for Implementing the SDGs



Source: GIFE Census, 2017
Base: 116 respondents (Q.4.10.c)

Partnerships with other social investors are also relevant. By coordinating efforts and developing long term plans, foundations tend to gain greater strength and relevance as drivers of social transformation. In line with this proposition, Agenda 2030 challenges the philanthropic sector to direct its investments to make the sustainable development agenda a reality. Social investors are natural partners in this agenda, as philanthropy programs are largely aligned with the social and environmental demands in the territories where they operate.

In this sense, understanding how social investors engage in joint investment partnerships

is crucial, as only 12% of them declare that they are not involved in co-investment activities. Most co-investment actions happen through the provision of non-financial resources -- through human resources, advocacy, transfer of methodologies, among others -- which indicates a significant involvement based on people and knowledge exchange. Nevertheless, only 19% contribute with financial resources,²⁸ which reinforces the implementing operational model of Brazilian social investors, posing a challenge for scaling up solutions.²⁹

Partnerships with the academy on training and research are essential for deepening knowledge

²⁸ Source: GIFE Census, 2017.

²⁹ Rockefeller 2017. *Scaling Solutions Towards Shifting Systems*.

about key thematic areas that can accelerate and catalyze impact on the SDGs. This approach becomes even more fruitful in the context of the 2030 Agenda, particularly seeking new solutions to the challenges posed by pressing development issues.

International cooperation agencies are also perceived as relevant partners for social investors. This is a global trend as the flow of philanthropic capital to developing countries has grown substantially over the past 10 years, reaching 32 billion US dollars in 2014.³⁰ In this sense, there is a mutual interest reflected here. Strengthening collaboration with foundations opens an opportunity for international cooperation to broaden the results and impact of sustainable development. In addition, institutes and foundations are partners of choice for generating innovative social technologies, complementary knowledge and insights about local contexts.³¹

Remarkably, partnerships with governments for the implementation of SDGs are not seen as a priority, as it figures only in fifth place. Preference is on collaboration with sub-national governments, particularly municipal governments for 41% of respondents. Alliances with states and with the federal government appear in a smaller proportion, representing respectively 30% and 28% of preferences.

In terms of priority, companies seem to be more relevant partners to 39% of respondents, appearing at the forefront of partnerships with state and federal governments.

This data contrasts significantly with the finding identified in the GIFE survey that 80% of

the social investors adopt criteria of approximation and alignment with public policies. For half of private social investors, aligning strategies with public policies offers an opportunity for increasing success and scale of programs and projects supported by foundations and institutes.³²

Low mutual knowledge between government and philanthropic institutions results in missed opportunities for leveraging mutual resources. A change in this pattern is happening in several countries, as foundations and governments have shown growing interest in converging their parallel actions to build common agendas. Many factors help explain this trend, including the expansion of the worldwide philanthropic sector, pressure on government budgets, and a growing understanding of the need for cross sectoral collaboration to implement Agenda 2030.³³

In Brazil, the national government is approaching this sector for the implementation of the Agenda 2030 through the SDGs National Commission, which is composed by government and civil society. However, there is still room to promote an enabling institutional environment for the philanthropic sector to ensure greater sustainability of development agendas and to support the advancement of this field.

In the context of Agenda 2030, it is vital to create opportunities to strengthen the role of foundations and private social investment to act in cross sector partnerships in support of accountable and inclusive institutions, sustainable development governance, broaden gender equity, minimizing negative impacts on people's life and making society more resilient.

³⁰ OCDE, 2016. *Bringing Foundations and Governments Closer: a cross-country analysis*.

³¹ UNDP, July 2015. *Stronger partnerships with foundations to take sustainable development further* by Marcos Neto and Karolina Mzyk, UNDP. Available at: <http://www.undp.org/content/undp/en/home/blog/2015/7/27/Stronger-partnerships-with-foundations-to-take-sustainable-development-further.html>

³² GIFE Census 2016.

³³ OCDE, 2016. *Bringing Foundations and Governments closer: a cross-country analysis*.

Catalyzing innovations – a story about Brazilian foundations collaborating on the SDGs

SDGs are very different than MDGs. In addition to looking at well-being, they also focus on creating prosperity for all. And so, it's important that goals on health and education be tackled along the targets for creating jobs and fighting inequalities. The implementation of sustainable development pathways in societies cannot be achieved with the current governance models, which are driven by sectoral agenda and divisions. Instead we need the “whole of the society approach” where we all – private and public sectors – play a part and take a leadership in the implementation. The complex and inter-related challenges such as achieving quality education or reducing inequalities require strategies that shift entire systems.

We have designed and tested a new methodology which applies systems thinking to understand the root causes of the problems, where stakeholders jointly identify levers and co-design collaborative pathways. We have developed the model in collaboration with the Stanford University Change Labs and Continuum Advantage and refined in the process of testing in Kenya, Zambia and Ghana.

This chapter shows the journey of collaborative pathways of the Brazilian foundations and, with their leadership, we have adapted the method further to fit the local needs and opportunities, reflecting the Brazilian foundations operating cultures. During the process, we worked with REOS Brazil, which has a lot of experience in systems and design thinking.

1. Mapping the “SDG ecosystem” and who is doing what

Brazilian philanthropy is diverse and engaged in many networks and affiliate groups. Many of these networks are now embracing the SDGs as a common framework in a movement to identify new opportunities.

A group of B have taken implementation

of the SDG Philanthropy Platform (SDGPP). The main motivation has been to better understand where philanthropy can have an impactful contribution and how the group, through nt, business and with the new res.

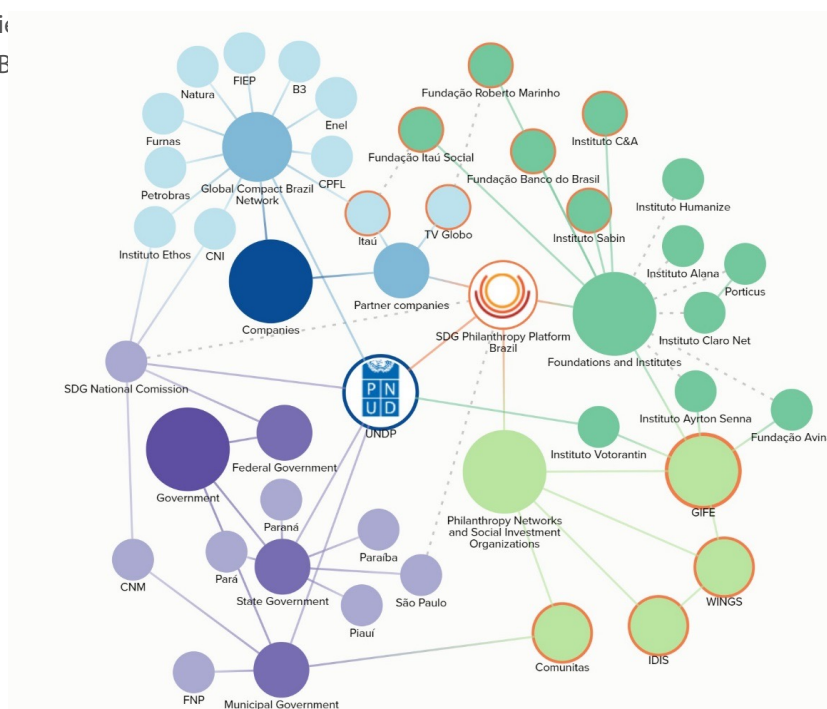


Figure 18. Mapping organizations engaged with SDGs in Brazil (in direct or indirect collaboration with Philanthropy)

These networks aim to strengthen and amplify public policies, develop responsible business activities, advance social gains and prevent environmental problems to fill emerging gaps in meeting the SDGs. By using their expertise and resources to solve complex and interconnected issues, they explore new opportunities and innovate solutions around the SDGs.

One of the key objectives is to identify how philanthropy can organize systemic dialogue and collaboration with the government that drives the SDGs agenda through setting priorities and aligning indicators. SDGPP convenes the **public private dialogue** with national and a state government, during seminars and co-creation activities. It is an opportunity to identify strategic

In public policy, the Brazilian Federal Government established the SDGs National Commission in 2017, coordinated by the National Social Articulation Secretariat, composed of 32 representatives of civil society - including sectoral organization, and governments - for advancing the implementation of 2030 Agenda and achieving its objectives and goals. The SDGs National Commission, together with subnational commissions, has the role of disseminating 2030 Agenda in the country by collaborating with partners, training public agents and identifying good practices. Moreover, it analyzes existing sectoral plans by verifying which public policies are addressing the goals, for guaranteeing the best implementation of the Agenda in the country. By monitoring national indicators and the SDGs that are not yet covered by public policy, the commission will identify priorities and suggest actions needed for reaching the goals through government programs and public policies.

The infographic (Figure 16) illustrates how the six foundations who set up the SDGPP are part of a larger SDG ecosystem in the country – where they are connected or disconnected.

points in which philanthropy can collaborate with public policies in an innovative way to address development challenges.

With companies, UN Global Compact Network created a SDG working group that promotes business engagement to achieve the 17 Sustainable Development Goals. Through dissemination and capacity building around the new agenda, the group stimulates that private sector plays a transformative role in 2030 Agenda, advocating for the reduction of business impact on these goals. The group promotes partnerships for the goals, in articulation with public policies, and collaborates with other organizations and coalitions that share the challenge of engaging Brazilian and global companies with the SDGs.

"We must internalize and channel this agenda to the territories, creating a long-term plan and public policies for reaching the goals", said the Coordinator of Special Projects at the Government Office of the Presidency of the Republic.

We wanted to design a collaboration that would emphasize the urgency and ambition that is required to effectively address some of the challenges that the foundations working on the SDGPP are concerned about – education, social inclusion and environmental sustainability. Being aware that successful and sustainable innovations at scale that shift systems are rare, the group

applied an approach which combined understanding the system, identifying levers and structuring transformative partnerships that can shift these systems. Central to our thinking was developing an approach that could effectively drive and move the needle on the SDGs that foundations and institutes are concerned about.

2. Designing a collaboration to reach scale and shift systems

Designing solutions for scale **demands** thinking about **scale in the initial design of collective impact strategies**.

According to a recent report prepared by Rockefeller Philanthropy Advisors and partners,³⁴ in order to be being more effective and agile, philanthropy should consider **shifting away from a project-oriented lens towards a more sustained, transformation change** that can help create the conditions that facilitate large-scale impact.

Scaling solutions for systemic change also requires **breaking silos**, new approaches for funding and promoting **strong collaboration** among funders and grantees as well as multi sector alliances, involving donors, foundations, government and impact investors.

Barriers for bringing innovations to scale are often political in nature, and **navigating politics in innovation and public-sector engagement** are vital for leaving no one behind in the development process.³⁵

Foundations and institutes engaged in the SDGPP in Brazil form an ecosystem of collaborators who apply system thinking to **drive innovation** and find solutions to development outcomes. By proposing a systemic approach,

collaborators can interact at two levels: recognize the dynamics and interrelated elements that create existing bottlenecks for development and make shifts towards desired outcomes

3. Framing the challenge – what do we know and where are the gaps?

The mapping of the key socio-economic factors allows foundations to understand the “big and comprehensive picture” and analyze linkages,

which is essential in framing the challenge they wanted to address.

Design of the collaboration has applied a logical step by step methodology to identify interconnectivity and interdependence. It also searches for **dealing with problem root causes for strengthening initiatives supported and**

implemented by institutes and foundations. Using SDGs as a framework that creates strategic alignment around collective outcomes, the platform intends to make a collective movement for change and provide the tools for monitoring

Brazil was successful in reducing poverty and inequalities

Brazil reduced extreme poverty by 75%, by raising approximately 30 million people to the middle class which contributed significantly to the achievement of the poverty reduction goal set by the Millennium Development Goals (2000-13).

Inequality was reduced significantly between 2003 and 2014.³⁶ The income level of the poorest 40% of the population increased by an average of 7.1%, in real terms, compared to the 4.4% increase in income among general population.

Economic growth has been slowing since the beginning of the decade

³⁴ ROCKFELLER, 2017. *Scaling solutions toward shifting systems*.

³⁵ UNDP 2017.

³⁶ Gini coefficient fell 6.6% in the same period, from 58.1 to 51.5.

In the last three years, on the economic side, Brazil has been experiencing a strong recession as GDP contracted by 3.6% in 2016.³⁷

There are approximately 13.5 million people unemployed, as unemployment rate has doubled in only two years (2014-16), from 6.5% to 12% and per capita income decreased 4.4% in just one year (2015-16).³⁸

In terms of other macroeconomic indicators, the economy is beginning to show some signs of recovery: low inflation, employment growth, and expansion of foreign investment in the country.

Eradicating poverty is no longer the unique goal

Brazil faces new challenges concerning protecting social achievements and improvements, as well as in building resilience, according to most recent UNDP *Human Development Report*³⁹.

Moreover, the social and economic achievements of the last decade have not equally benefited the whole population. Two critical groups have remained outside social and economic improvements:

- **Vulnerable by income** – a significant number of people raised to the middle class are now under the risk of returning to poverty
- In Brazil, 4 million people to poverty in the same period (2014 and 2015). Among them, 1.4 million people have moved into extreme poverty, as indicated by the Atlas of Human Development.⁴⁰

- This setback also reflects a regional shift. According to the latest Regional Human Development Report on Multidimensional Progress, there are 224 million Latin Americans at risk of returning to poverty: that is, 35% of the region's population.⁴¹

- **Excluded beyond income** – represents a group of people excluded by ethnic, racial, gender, sexual identity, and migrant status and disability characteristics. In this group, women and youth are severely affected in economic system and spheres of citizenship.

Despite progress in reducing poverty, inequalities remain high

In 2010, the HDI for the black population (0.679) was approximately equal to the HDI of the white population in 2000 (0.675).⁴²

The youngest are the most affected by the growth of unemployment in the country. Between 2015 and 2016, the unemployment rate among young people aged 14 to 24 years increased from 20% to 27%.

Women are also affected, receiving up to 25% less pay than men in similar jobs, even having a higher average in years of study.

As a result, Brazil ranks among the ten most unequal countries in the world. In Latin America and the Caribbean, the country is behind only Haiti, Colombia and Paraguay.⁴³ Changing this situation is a task still to be accomplished by Brazilian society.

Brazil ranks 79 among 188 countries in the Human Development Index, according to the Human Development Report 2016.

³⁷ World Bank, 2017.

³⁸ MINISTÉRIO DO TRABALHO; IPEA. Mercado de Trabalho: Análise e Conjuntura. Brasília, 2017. IBGE 2016.

³⁹ UNDP, Human Development Report 2016.

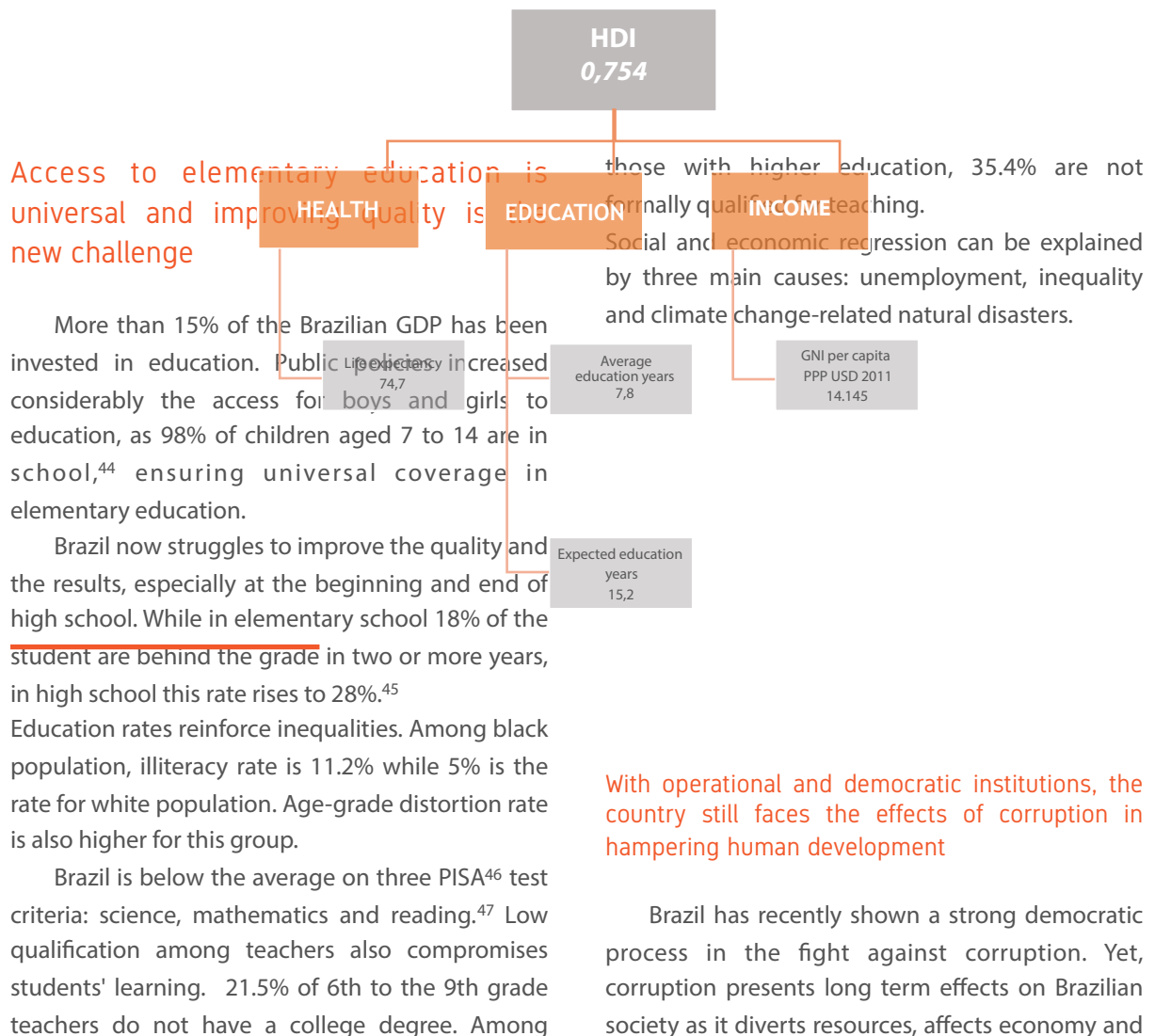
⁴⁰ UNDP, 2016.

⁴¹ UNDP, Human Development Report 2016.

⁴² UNDP, IDHM 2016. According to the GINI coefficient, which measures income inequality,

⁴³ PNUD 2016. *Relatório de Desenvolvimento Humano Regional de Progresso Multidimensional*.

Figure 20. Brazil Human Development Index



⁴⁴ IPEA, 2010.

⁴⁵ INEP 2016. *Censo da Educação Escolar Básica 2016*.

⁴⁶ Program for International Student Assessment

⁴⁷ OCDE 2015. Program for International Student Assessment (PISA)

social development, compromises institutions and the rule of law, reinforces injustices and increases inequality. It is estimated that for each 1 real diverted by corruption represents a damage of 3 reais to economy and society.⁴⁸

Corruption, theft and tax evasion costs exceed 5% of global GDP per year (2.6 trillion dollars),⁴⁹ representing an annual loss of about 1 trillion dollars paid in bribes per year, according to the World Bank Group.⁵⁰ In Brazil, it is estimated that up



and inflated demand estimates.
Photography by Sambazon

- Investment in education is often nullified by corruption: distortions in investment and public budget decisions result in inefficient management of physical assets and a lower level of human resources qualification (students, teachers and managers).
- Distorted decisions in the allocation of public health resources. Common types of abuse are distortion in the medical service

delivery, contracts, and unethical marketing relationships, abuse of power, fraud and misuse of reimbursement request, drugs and services.⁵⁴

- In the environmental area, illegal logging contributes to approximately 20% of greenhouse gas emissions globally. This practice generates between 10 to 23 billion dollars per year, creating a great environmental and social loss.⁵⁵
- Deterioration of human rights advocacy and increased organized crime.⁵⁶
- Loss of confidence in institutions and democracy.

As a young middle-income country, Brazil still has a long pathway to reach sustainable development, as set by the 2030 Agenda. Developing resilience tools are vital for guaranteeing social achievements. In the end, critical drivers that can take people out of poverty differ from those that can prevent returning to poverty.⁵⁷

Sustainable development is also an issue of social justice, and a matter of distributional equity. If policies do not deliver well-being to marginalized and vulnerable people and if institutions fail to ensure that people are not left behind, there must be mechanisms for claiming social and human

⁴⁸ CNI, 2013.

⁴⁹ World Economic Forum

⁵⁰ World Bank Group 2017. Combating Corruption Governance Brief.

⁵¹ Ministério Público Federal, 2017.

⁵² OCDE 2015. *Relatórios Econômicos da OCDE Brasil*.

⁵³ World Bank Group 2017. Combating Corruption Governance Brief.

⁵⁴ OCDE 2015.

⁵⁵ Transparency International 2016. *Corruption Perception Index*.

⁵⁶ UNHCR, 2016. Available at: <http://www.ohchr.org/EN/Issues/Development/GoodGovernance/Pages/AntiCorruption.aspx>

⁵⁷ UNDP 2016. Human Development Report. Raising people out of poverty requires social protection policies, healthcare programs and a dynamic labor market. On the other hand, structuring public policies and social programs that facilitate access to assets (goods, financial services, etc.), education and job qualification may reduce the risk of vulnerable population returning to poverty.

rights, accessing justice, promoting inclusion and ensuring accountability.⁵⁸

A workshop on Identifying SDGs accelerators for creating collaborative pathways

In order to do so, SDGPP Brazil invited 20 institutes and foundations to participate in a workshop to identify, through a systemic mapping, the most important challenges to reach Agenda 2030 in Brazil and the leverage points to overcome it. It also set the first step to co-create a collective vision of success and desired results for collaboration.

"We need to understand how philanthropic organizations are integrating the SDGs in their social investment strategies"

The methodology for defining SDG accelerators led by the Platform for Philanthropy in Brazil had as its starting point the identification of the country's most pressing needs followed by an open debate on the most relevant topics to be addressed by philanthropic organizations. Methodology applied by REOs Partners. A systemic thinking framework was used to understand the relationships between the most pressing problems faced by these organizations when implementing their programs, leading them to foresee new patterns for change. Systemic thinking amplifies the capacity of understanding and generates new ways of thinking.⁶⁰

⁵⁸ UNDP 2016. Human Development Report, page 16.

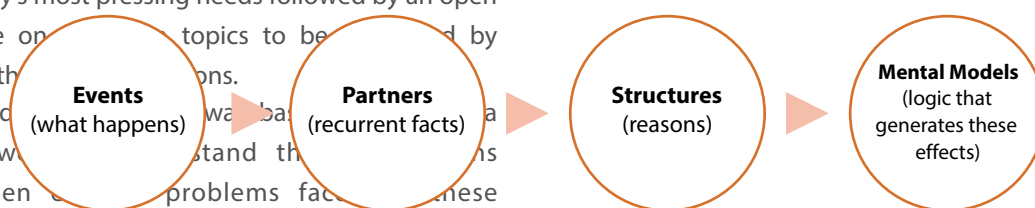
⁵⁹ Methodology applied by REOs Partners.

⁶⁰ Peter Senge.

In this debate, existing patterns, structures and mental models have been identified. Participants worked together in mapping events that repeat themselves, structures that support these patterns enabling them to happen, as well as thoughts or mentalities that create these structures.

Mapping and prioritization exercise help to adopt a systemic and cross-sectoral approach to poverty alleviation, reduction of inequalities and environmental management. Main issues brought by participants were grouped into thematic areas, and were later prioritized as catalytic points for development.

Prioritized thematic areas on structure and mental models can be synthesized by the fragility in social contract and governance, lack of accountability, short term view, inefficiency and low quality in services accessed by poor population, inequality, prevalence of individual interests upon social relations and collective priorities.



"There are many debates and conversations, but no one says: ok, now we'll collaborate"

"We want to promote a more strategic and more transformative role for private social investment"

Identifying SDGs Accelerators

To identify the key thematic areas and priorities for Brazil's development, participants were invited to reflect on which SDGs have the greatest potential to accelerate and generate a catalytic



Figure 22. System Thinking Mapping and Dynamics in this area. Currently, philanthropy is very operational, and this theme requires greater social control and advocacy. At the same time, it requires more freedom of action and cooperation mechanisms between organizations, including public agencies. Peace, justice and functioning institutions are integrated and they can generate a mindset shift and a cultural change impacting all the other SDGs.

"Access to justice is restricted and needs to be expanded"



Figure 23. Dynamics on SDGs accelerators
There is no mechanism for orchestrating partnerships between the philanthropic sector with public policies, or a favorable business environment, access to technology, information and data, or the provision of resources directed to implement the SDGs. Partnerships provide the greatest opportunity for developing the SDGs in a more effective way.

Integrate other SDGs via SDG 17 by developing a methodology for systemic thinking. Use the platform as a space for work that also as supports philanthropic organizations. Building on public opinion and communication is vital.



"Philanthropic institutions should support actions to have a more systemic and integrated vision between organizations and themes."

Reduced Inequalities:

Almost all philanthropic actions are aimed at reducing inequalities, but much remains to be done to achieve this goal.

The field of philanthropy needs to better understand vulnerability issues in order to remove existing barriers and reduce inequality. Having SDG 10 as an accelerator depends on a public commitment integrated with collaborative action, involving government and civil society mobilization.

17 PARTNERSHIPS FOR THE GOALS



"Overcoming inequality will facilitate the operating environment for philanthropy"

Quality Education:

Several programs and projects related to this topic are being implemented with philanthropic investment, but education is considered as the basis of transformation for all other issues, working as a mindset changer and an impact accelerator. In this field, it was identified that there is a lack of integration and articulation between implementing actors (between philanthropy institutions and in the articulation with public policies).

10 REDUCED INEQUALITIES



"Education is a public problem and not only a state problem, there are these concepts misunderstanding in Brazil"

"There are a lot of people doing a lot of things on education, but there is no articulation."

SDGs accelerators were tested with approximately 50 participants in the workshop *Strategies for SDGs* organized at 2017 IDIS Forum. SDGs that most piqued participant's interest were SDG 10 and SDG 17, followed by SDG 16 and SDG 4, in order of priority. Working groups discussed their relevance

4 QUALITY EDUCATION



and how they relate to philanthropy institutions field of action. In addition, participants made suggestions on how to address these SDGs for catalyzing a systemic change.

Conclusion

The facilitated discussion allowed the participants to reflect on the complexity and interdependence of the goals. The systems thinking illustrated how the negative phenomena such as poverty and inequality are deeply entrenched in the cultural and social norms and systems in the country. The approach allowed for in depth understanding of cultural patterns and revealing metal models, - it brought surprising results. The workshop brought out the best of the foundations – the dynamics dissolved the silos



Photography by Natalia Sant' Anna

Corporate social investment and the SDGs

Anna Maria Peliano⁶¹

Bruna Palhuzi⁶²

The UN Sustainable Development Goals (SDGs) challenge the private sector to engage in the quest for innovative solutions, beyond the field of business. The 2030 Agenda calls for collective action to build a better world and recognizes that “Eradicating poverty in all its forms and dimensions, including extreme poverty, is the greatest global challenge and an indispensable requirement for sustainable development”. Therefore, it is necessary to seek answers to the following questions: what have companies voluntarily done to improve the living conditions of communities? To what extent can the private sector contribute to the achievement of the SDGs?

For over a decade, the BISC⁶³ research has been following the companies that have stood out as the reference in the field of social investments, and the results point to the consolidation of this work. In the last five years, the companies in the group have invested, on average, in social projects around R\$ 2.8 billion per year, and have maintained this pattern despite the volatility in the country's economic situation. In addition, social projects support themselves through their own resources, since fiscal incentives accounted for less than 23% of the total applied⁶⁴. The educational activities

absorb most of these investments: about R\$ 950 million / year. The priority given to education is due to the understanding of the group that the solution of social problems in Brazil necessarily requires improving the educational level of the population.

The convergence between the companies' social goals and the SDGs is not limited, however, to the area of education. To explore other possibilities for integrating the agendas, the BISC introduced this theme in the field of its investigations, starting in 2016. To this end, companies were encouraged to map their main social projects that can contribute to the achievement of the 17 SDGs. This initiative was important because it allowed the group to select a cast of 78 projects that are already well structured, focusing on identifying which objectives each of them relates directly or indirectly. The results reinforce that it is in the field of education that companies are more advanced: 39% of projects are directly related to the SDG 4 (Figure 24). It is also interesting to note that overall, the outstanding projects adopt comprehensive approaches since about 40% of them relate to more than four SDGs (Figure 25).

⁶¹ BISC Research Coordinator

⁶² Researcher at BISC – Comunitas.

⁶³ Benchmarking of Corporate Social Investment is a tool to support the management of social projects and knowledge production on private social investments. Each year, a new theme related to the social action of the private sector is incorporated into the BISC and in 2017, it was the opportunity to analyze the possibilities of integrating social investments into the SDB. The survey covered a universe of 325 organizations. This included companies and foundations, who are part of the Brazilian Committee of the Global Compact (CBPG) and who were willing to answer questions related to ODS.

⁶⁴ The address the topic on the alignment of social investments with the SDGs, Comunitas has been working with several organizations committed to the implementation of Agenda 2030. These institutions are the United Nations Development Programme (UNDP); the Brazil Network of the UN Global Pact; the Center for Sustainability Studies of the Getúlio Vargas Foundation (GVCes); the Public Agenda; and the Brazilian Corporate Volunteer Council.

As highlighted along the years, most companies have established institutes or foundations to handle social investments. Nonetheless, they maintained a direct involvement in conducting social practices and in investing a higher amount of resources than the one invested through their institutes/foundations. In this way, whenever considered relevant, the research seeks to differentiate what each of these segments has done. Regarding the possibilities of

integration with Agenda 2030, what is notable is that both can act in this area together, or not. Most of the projects that are related to the SDGs are developed only by companies (41%), or only by institutes (36%), as can be seen in Figure 26. This information is of special relevance for those who seek to mobilize the private sector to engage with the SDGs. The strategies adopted should consider the specificities of these two groups of organizations.

Figure 24. SDGs companies' social projects are more directly connected with

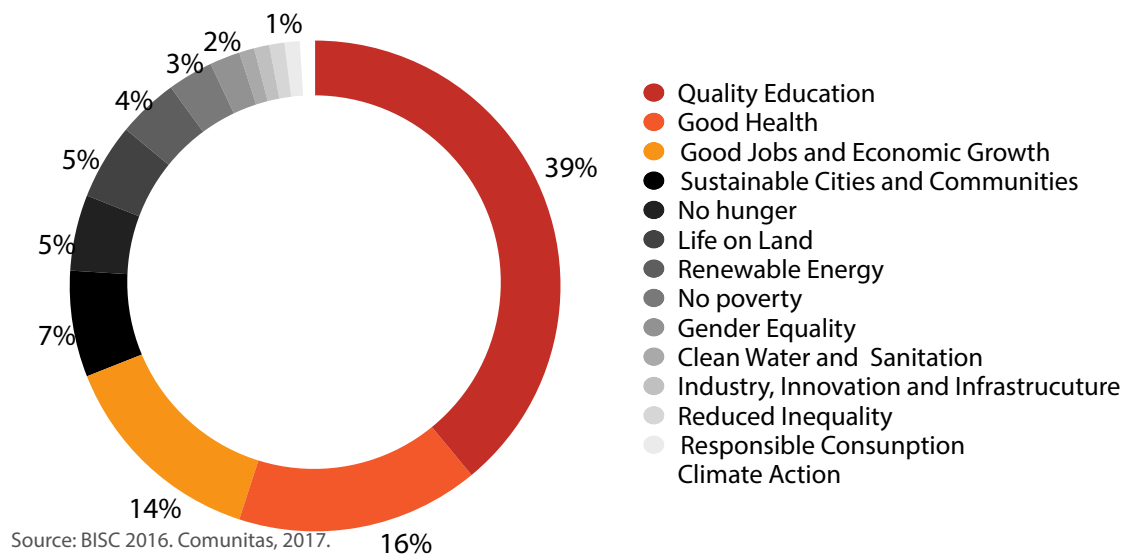


Figure 25. Scope of main projects developed by companies, considering the number of the SDGs to which they are related

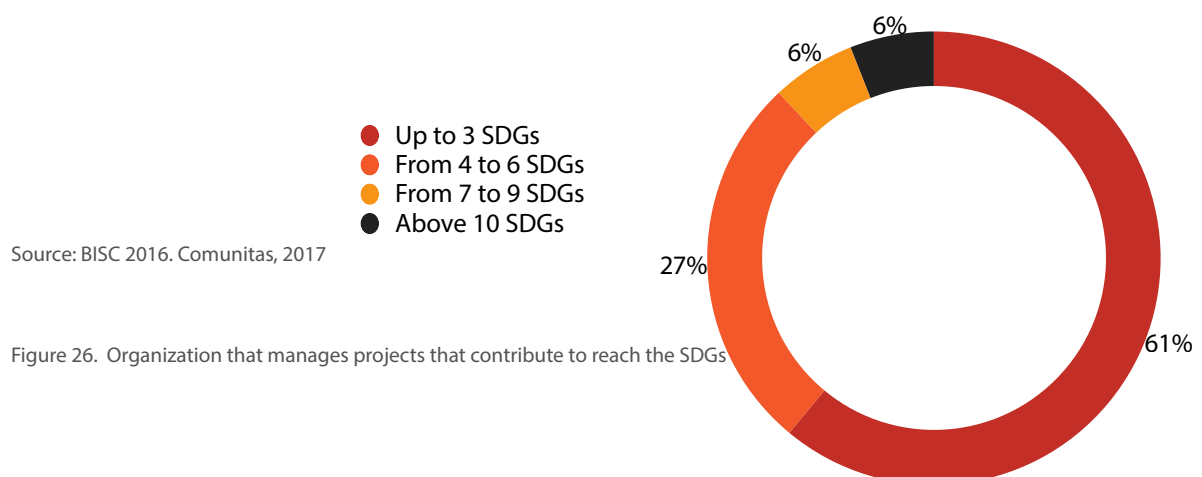
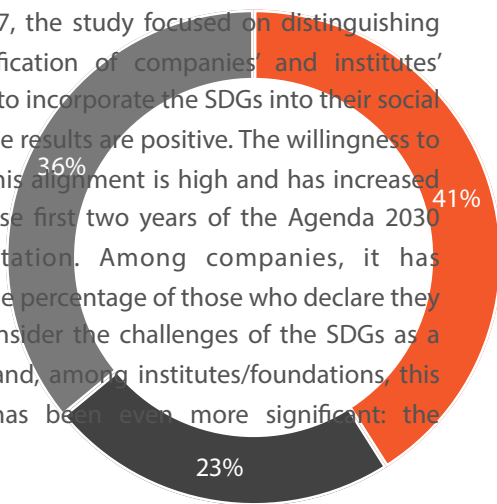


Figure 26. Organization that manages projects that contribute to reach the SDGs

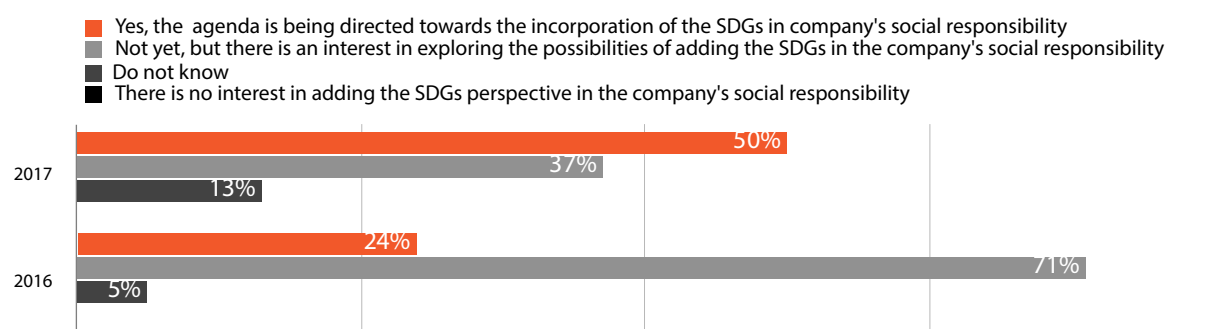
Source: BISC 2016. Comunitas, 2017.

In 2017, the study focused on distinguishing the identification of companies' and institutes' intentions to incorporate the SDGs into their social agenda. The results are positive. The willingness to promote this alignment is high and has increased during these first two years of the Agenda 2030 implementation. Among companies, it has doubled the percentage of those who declare they already consider the challenges of the SDGs as a reference and, among institutes/foundations, this progress has been even more significant: the



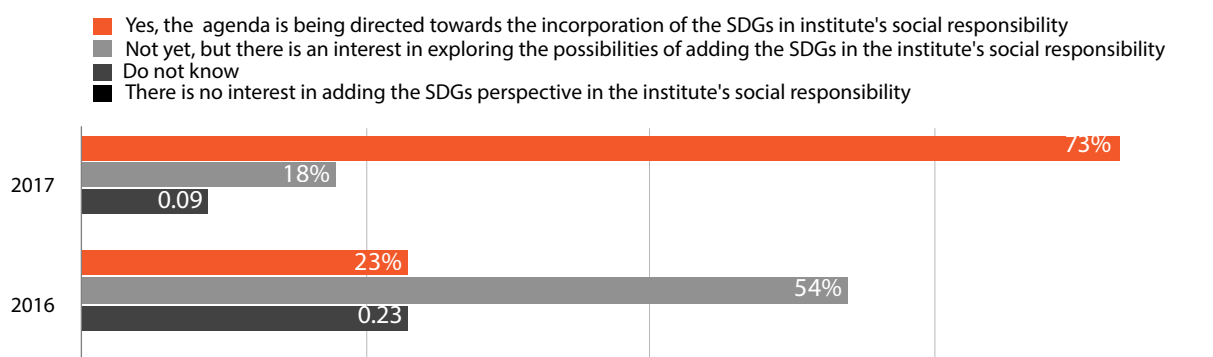
percentage has more than tripled (Figure 27 and 28). Therefore, the group is engaged, in these first two years, to expand their knowledge on the subject, aiming at mapping possibilities for aligning their investments with the Agenda 2030. They have been identifying the possible connections between their ongoing projects and the SDGs, and have been using the SDG indicators to monitor the results of their projects.

Figure 27. SDGs framework considered as a reference in the company's social responsibility agenda



Source: BISC 2016. Comunitas, 2017.

Figure 28. SDGs framework considered as a reference in the Institute's social responsibility agenda

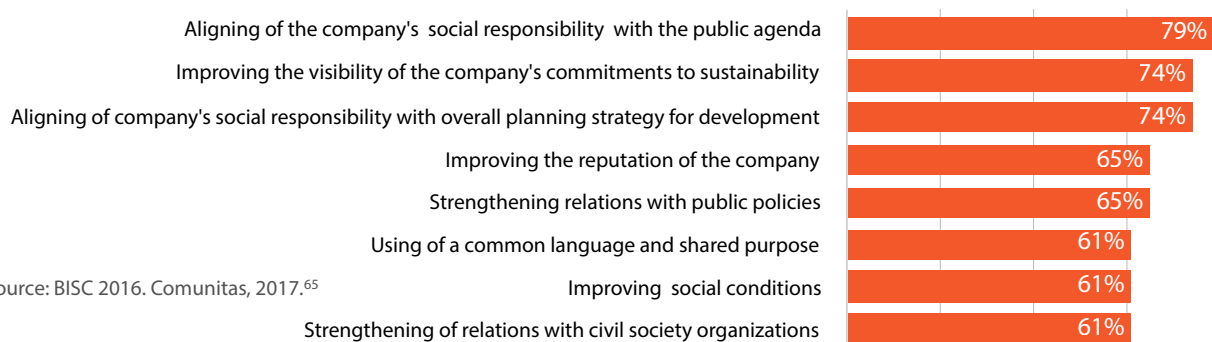


Source: BISC 2016. Comunitas, 2017.

Such observance can be attributed to the organizations' perception of the benefits that can result from the alignment of social investments with the SDGs. The results presented in Figure 29 indicate an understanding that this interaction takes social investments to a new dimension, more inclusive and more connected to a global agenda, to public policies and to business. On the other

hand, in this process companies have faced many challenges, such as reorienting ongoing projects and reaching the required scale; securing resources for new projects; engaging the various units of the company; and generating the information and indicators required for the evaluation of the results (Figure 30).

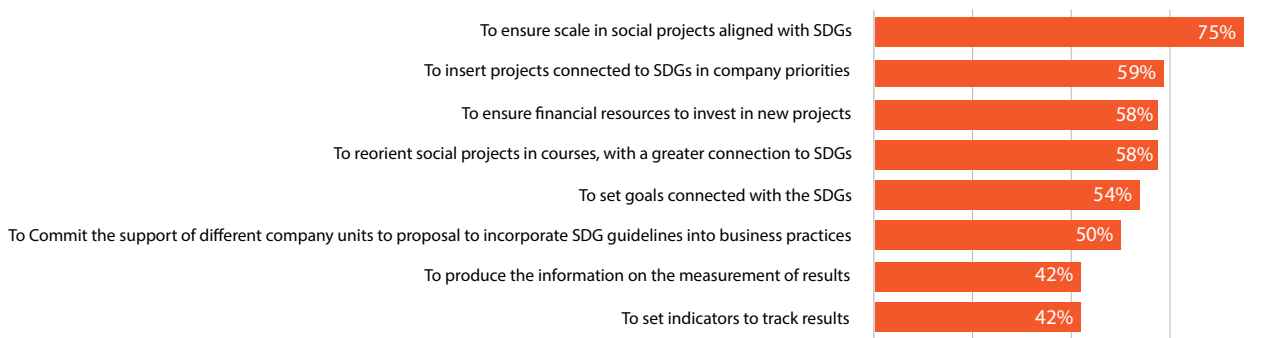
Figure 29. Main benefits that the company can obtain from the integration of the SDGs perspective into its social investment



Source: BISC 2016. Comunitas, 2017.⁶⁵

⁶⁵ * Note: The data refers to the percentage of companies that answered that the mentioned difficulties are high or very high.

Figure 30. Main challenges for companies to integrate the SDGs in its social investments



Source: BISC 2016. Comunitas, 2017.⁶⁶

It is important to emphasize that, in the companies' view, the benefits that can be obtained through the interaction of the agendas are greater than the difficulties to be faced, and this justifies the integration effort. It remains to be seen how this perception will be reflected in effective implementation by the private sector. What is certain is that a systematic provision of qualified information by the institutions involved in the implementation of the SDGs will be essential to promote such integration, and to monitor the results that may come from this collective effort.

In summary, the study reveals that the alignment of social investments with the SDGs is underway and that there is room for important implementation in this area. Nonetheless, progress will depend on extensive mobilization. Companies will be more involved as there is a mobilization of the society, who demands the public and private organizations to commit themselves to a fair and sustainable development: **"leaving no one behind"**, as proposed in Agenda 2030.



⁶⁶ * Note: The data refers to the percentage of companies that answered that the mentioned difficulties are high or very high.

A man with a beard, wearing a blue t-shirt, a grey cap, and earbuds, is crouching in a workshop. He is focused on working on a piece of machinery on the right side of the frame. The background is filled with various tools, cables, and equipment, suggesting a technical or industrial environment. A large white outline of the number '4' is superimposed on the left side of the image.

4

Investment for
Development: the
contribution of
foundations and
institutes

4. Investment for Development: the contribution of foundations and institutes

The world is currently working towards a set of ambitious targets for addressing global challenges and achieving the SDGs. Private capital is urgently needed to fill this gap and address pressing global challenges. In many ways, the SDGs are more about financing than giving, and it requires a set of resources coming from governments, private sector, development agencies, and philanthropy. Social investors have uniquely flexible risk capital to broaden the appeal of investing in sustainable development while driving impact.⁶⁷

The contributions of philanthropy to development are significant, but little known. In the last decade, private investment and capital flows (including foreign direct investment and private domestic investment) have outpaced Official Development Assistance (ODA) and other capital flows to developing countries. It is estimated that private donation to OECD countries alone accounted for \$ 51 billion, accounting for nearly half of the value of ODA contribution in 2011.⁶⁸ In developing countries, there is a growing tendency for philanthropic organizations to increase their private social investment. The flow of philanthropic capital to developing countries reached 32 million dollars in 2014, increasing almost ten previous years.⁶⁹

In Brazil, however, is not following this trend. In recent years, social investment organizations directed 3 billion reais to implement their programs and projects in 2014.⁷⁰ If added up with the results of corporate social investment⁷¹, the total volume invested by Brazilian social investors in that year reached 3.9 billion reais. However, this

trend receded in 2016, where the total volume of funds invested was 2.9 billion reais representing a decrease of 19% compared to 2014, as previously detailed in the article *Panorama of private social investment in Brazil*. This decrease brings even more challenges to the Brazilian philanthropic sector, considering the pressing social problems faced by Brazilian society.

In any case, global philanthropic funds, even when combined with the development or aid budgets of governments, add up only into the billions of dollars. Foundations are also searching for innovative finance solutions for addressing social issues in scale and for identifying long-run sustainable sources for their initiatives.

There is also a growing tendency to approach philanthropic organizations and socially responsible investment in new forms of investment that tend to question the traditional dichotomy between business and philanthropy. In the past decade, the field of impact investing has gained more relevance. The Global Impact Investing Network (GIIN) estimates a market of US\$114 billion in impact investing assets, of which US\$22.1 billion committed in 2016. The expected growth in commitment in 2017 is of 25.9 percent.⁷²

In Brazil, there is a significant and growing interest: 15 new impact investors entered in the market between 2012 and 2013. These actors made commitments between USD 89 million and USD 127 million in 2014 with a focus on education, financial inclusion and health sectors, followed by housing, pollution prevention, waste management and renewable energy.⁷³

⁶⁷ Rockefeller Foundation, 2017. A New Role for Foundations in Financing the Global Goals by Saadia Madsbjerg, 2017.

⁶⁸ Fonte: UNDP July 2016. *UNDP's Private Sector and Foundations Strategy for the Sustainable Development Goals 2016-2020*.

⁶⁹ OCDE, 2016. *Bringing Foundations and Governments Closer: a cross-country analysis*.

⁷⁰ Fonte: Censo GIFE 2014.

⁷¹ Fonte: BISC, Comunitas 2014.

⁷² Source: J.P. Morgan survey 2015.

⁷³ *Mapping the Impact Investing Sector in Brazil*. Aspen Network of Development Entrepreneurs (ANDE) and partners, 2014.

Brazilian philanthropic organizations are also engaged in this initiative either by channeling their investments to support social impact investing funds or by supporting social enterprises and social business accelerators for diversifying their scope of action and amplifying their social outcomes. 42% of Brazilian social investors act in some way with

social impact initiatives, as the GIFE survey has shown.⁷⁴ In this sense, social impact investment emerges as an opportunity to combine financial and non-financial resources to support and coordinate systemic and scalable solutions that meet development challenges and transform realities.



Photography by Kenia Ribeiro

⁷⁴ Source: Gife Census 2016.

The Role of Family Philanthropy for Sustainable Development in Brazil

Paula Fabiani⁷⁵

In recent years, the world has witnessed an important socioeconomic movement. Developing countries - such as Brazil, China, and India - recorded strong growth, which led to wealth generation, and an increase in the middle class and the number of millionaires. According to the Charities Aid Foundation's report on The Potential of Global Philanthropy⁷⁶, middle-class spending across the globe is expected to reach US\$200 trillion by 2030, double the amount spent in 2015. This movement has the power to transform our society. As the report points out, if 0.5% of these expenditures were directed to civil society organizations, we would have the impressive number of R\$1 trillion at the disposal of socio-environmental causes. Imagine if part of these resources were targeted at organizations committed to the Sustainable Development Goals (SDGs).

The participation of philanthropy is critical for the sustainable development of nations.⁷⁷ As Eduardo Giannetti⁷⁸ has stated on the importance of private social investment: *"There are many relevant, socially demanded things that neither the*

market nor the state in a democratic environment can actually meet. In addition, philanthropy and private social investment are on the demand side because there are things to be done." Jane Wales⁷⁹ has commented on the emergence of new philanthropists, driven by rapid economic growth in developing countries. For her, the new philanthropists have *"a view that the benefits of this new economy must be shared in a broad way - social development, economic development, and growth should not only be rapid but also inclusive"*.⁸⁰

Brazil has followed the worldwide trend of wealth growth but has not yet reached its philanthropic potential. According to the Brazilian Donation Survey⁸¹, 46% of Brazilians (over 18 years old, living in urban areas and with a family income above the minimum wage) donated to civil society organizations in the year 2015 R\$13.7 Billion, which corresponds to 0.23% of the Brazilian GDP of that year. The amount seems significant, but if we compare to the US, where the population donated 2.1 percent of GDP⁸² in the same year, we realized that we can and should invest in our philanthropic potential. It is worth mentioning that 2015 was a

⁷⁵ Paula is President of IDIS. She is an economist graduated at FEA-USP, holds an MBA from the Stern School of Business, New York University, a specialization in Endowment Asset Management at the London Business School and Yale, and the Management of Third Sector Organizations at FGV.

⁷⁶ CAF 2017. Laying the Groundwork for Global Giving. Available at: https://www.cafonline.org/docs/default-source/about-us-policy-and-campaigns/laying-the-groundwork-for-growing-giving.pdf?sfvrsn=989eac40_12

⁷⁷ The theme was discussed at the 1st Brazilian Forum of Philanthropists and Social Investors, conducted by IDIS (Institute for the Development of Social Investment) in 2012.

⁷⁸ Eduardo Giannetti, Brazilian economist and professor at Insper.

⁷⁹ President and CEO of the World Affairs Council and the Global Philanthropy Forum.

⁸⁰ The Transforming Role of Private Social Investment, 2014, IDIS.

⁸¹ IDIS 2015. For more information: <http://idis.org.br/pesquisa-doacao-brasil/>

⁸² GIVING USA 2016. Available at: <https://givingusa.org/giving-usa-2016/>

highlight in donations to non-profit organizations. The percentage of Brazilians who donated in 2016 has declined, according to the World Giving Index⁸³, and Brazil's position is still behind Chile and Colombia.

And the families that hold the greatest fortunes? What about private family social investment? What difference can it make in achieving the SDGs?

According to the CAF report, mentioned at the beginning of this article, until 2026 the world will see a growth of 43% in the number of ultra-millionaires (UHNWI)⁸⁴, individuals that have at least US\$30 million to invest. In Brazil, the data is also impressive. According to the Global Wealth Report 2016⁸⁵, we already have 172,000 millionaires in Brazil. Meanwhile, the country has 24 million people with incomes lower than US\$249 per year. There is a lot to do, and solutions are certainly going to happen through partnerships, strategic allocation of philanthropic resources, and collective efforts to achieve the SDGs.

However, Brazilian family philanthropy still has an evolutionary path to follow. According to a GIFE (Group of Institutes, Foundations and Companies)⁸⁶ survey, most family investors donate a relatively small portion of their assets to their organizations and civil society organizations, and even fewer are those that direct their investment to endowments, willing to ensure long-term socio-environmental transformations. Many do not even disclose what they do and how much they donate, partly because of security concerns, and partly because of the perception, pointed out by the report, of the existence of prejudice against the rich in the country, assuming that "they are motivated only by their own interests".

More important, however, in discussing the role of private family social investment is the fact,

pointed out in the report, that family foundations and institutes are still far from investing in public policy improvements and have difficulty in establishing partnerships. Both are crucial to reaching the SDGs. In addition, these groups should align efforts in this direction. It is worth adding that private family social investment can take risks more than corporate giving, and therefore can function as a space for R&D (Research and Development) in public policies, forming an ideal environment for experimentation in addressing systemic problems. This is a path with great potential in the quest for innovative solutions for achieving the SDGs.

However, we also have good news to celebrate. Family philanthropy has been growing and gaining relevance in recent years in Brazil. Important goals among the SDGs, especially in the area of education, are the focus of many familiar social investors. The environmental issue is also a prominent area. Moreover, the SDGs have a great potential for sensitization and mobilization of these investors. Beyond the issue with the areas of action, the impact assessment is also increasingly significant for Brazilian family social investors, which is fundamental for understanding the contribution of each one in this process. This is certainly evidence that our industry qualifies and aims for more efficiency and effectiveness.

Finally, among family social investors, the SDGs can represent an opportunity to connect generations. It is a concern of many families, not only Brazilians, and the SDGs are a good place to connect because they reflect discussions and debates that have involved individuals and groups representing different generations across the world. In addition, participating in a movement to address global issues will enable these families to reach out to organizations and families from other

⁸³ World Giving Index 2017. Available at: <https://www.cafonline.org/about-us/publications/2017-publications/caf-world-giving-index-2017>

⁸⁴ <http://veja.abril.com.br/economia/crise-milionarios-brasil/>

⁸⁵ Definition of Ultra High Net Worth Individual (UHNWI): <http://www.investopedia.com/terms/u/ultra-high-net-worth-individuals-uhnwi.asp#ixzz4s7L8ZxMp>

⁸⁶ Retratos do Investimento Social Familiar no Brasil, 2015: <http://gife.issuelab.org/resource/retratos-do-investimento-social-familiar-no-brasil.html>

nations who share the same ambitions to contribute to achieving goals to make the world a better place for all.

All efforts from all sectors will be necessary to reach the SDGs. Joining forces in this direction will

be a prominent path in the coming years that will widen the impact of private social investment on the global development agenda. And family philanthropy will certainly engage in this important agenda.



Photography by Chão de Sonhos

Philanthropy and Impact Investment: considerations to broaden the implementation of sustainable development agenda

Fábio Deboni⁸⁷

This article aims to debate the role of philanthropic capital on supporting both Social Finance and Inclusive Business in Brazil, by considering that

institutes and foundations can provide an in-depth contribution to these fields.

Overlap of sectors

The field of private social investment/philanthropy is characterized by its capacity to be, and to navigate, in fringe areas – between the public and private spheres, between companies, third sector, and governments. In Brazil, it has been building its identity and forming its repertoire of actions – speeches, practices, concepts, methodologies, and indicators. Despite the questioning that the field has been receiving⁸⁸, institutes and foundations have established themselves as relevant organizations in generating common goods from a private perspective. If not all the complexity inherent to this field was enough, we have been participating and witnessing a recent rapprochement between this field and that of social finance and social impact business.

The logic behind the financial return that generates social impact can be very interesting to civil society organizations – among them, institutes and foundations - and, therefore, generate a very clear and immediate connection between them. Behind this concept, which seems easy to understand, there is a set of keys to understanding that need to be identified and discussed. Hence, the question “how” is crucial at this moment when the sectors overlap. We choose to identify some of the possible paths that can inspire and guide

institutes and foundations to continue entering this field of social finance and social impact business.

An extended view on impact investment

The concept of impact investment is under construction and evolution in Brazil and in the world. The general understanding is that it is an investment that seeks both a financial return and social impact. In the first instance, it can narrow the possibilities of philanthropy engagement. Let’s understand why. In order to build a strong and dynamic ecosystem capable of addressing Brazilian regional disparities, it is essential that different actors (among them, institutions and foundations) invest (without financial return) to create and to strengthen various “middle-level” organizations that are crucial to this field.

Until we have an ecosystem strong enough for us to have good and abundant availability and diversity of social impact business to receive investment, there is still a significant job to be done⁸⁹. Therefore, we have been recommending a more expanded view (*lato sensu*) of the concept of “investment of impact” to build more overlaps

⁸⁷ Executive Manager at Sabin Institute (Instituto Sabin - www.institutosabin.org.br). He currently coordinates the Impact Business Network at GIFE (Rede Temática de Negócios de Impacto do Grupo de Institutos, Fundações e Empresas). He is the author of the book “Contemporary Perspectives on Private Social Investment” (“Reflexões contemporâneas sobre Investimento Social Privado”).

⁸⁸ This topic has been discussed in my previous article available at: <http://gife.org.br/tem-um-bode-na-sala-filantropia-na-berlinda/>

⁸⁹ For more information: <http://gife.org.br/quem-acelera-as-aceleradoras/>

between what the institutes and foundations traditionally do, with what the various organizations that are part of the ecosystem of social finance and social impact business do. In other words, when a foundation donates resources to an impact accelerator, it is also working in the field of social impact finances/investment, even though it doesn't seek a financial return for doing this. For some, this kind of action isn't characterized as a social impact investment, although it belongs to this field.

It's not an evolutionary line

It's worth reinforcing that many of the actors involved in this debate believe that institutes and foundations joining the field of social finance and social impact business is not progress or moving from work that is more traditional (philanthropic) to something more "modern". This is not the understanding that we have been recommending. Rather⁹⁰, we believe that the proximity between institutes and foundations and the field of social finance brings a new tool to their toolbox. Therefore, it's not about the most modern, or what is better or worse, but about new approaches that can coexist with existing approaches.

Learning by doing

In 2016, the Group of Foundations and Institutes of Impact (FIIMP)⁹¹ was created from an initiative led by the Social Finance Task Force⁹² and supported by various organizations. The FIIMP

comes from an effort to engage institutes and foundations in the implementation of an objective from one of the Task Force Recommendations⁹³. This objective suggested that institutes and foundations should allocate, by 2020, 5% of their budgets to foster the social finance and social impact business ecosystem.

The recommendation may look easy to achieve, but it is not that simple. As this is a new subject for institutes and foundations, this engagement was based on doing applied research.

The analogy would be to "get your feet wet"⁹⁴ in this ocean of social finance and impact business, noticing the water temperature, its movements, etc., to acquire more confidence before diving in.

There are 22 shareholder members and other partner members⁹⁵ at FIIMP and that have handed out USD 10,000 each to create a fund intended to test three different mechanisms to do investments of impact – loan, convertible debt (using crowd equity) and guaranty. There are two main purposes: to test various investment of impact mechanisms, and to develop knowledge about this process.

For each mechanism, the Group has chosen a "middle-level institution" from the ecosystem: Sitawi (guaranty), Dinamo (convertible debt/ crowd equity), and Bemtevi (loan).

I share the following 10 lessons learned so far, with no intention of speaking on behalf of the group:

⁹⁰ For more information: <http://gife.org.br/falsa-ideia-da-linha-evolutiva-da-filantropia/>

⁹¹ From the original: *Grupo Fundações e Institutos de Impacto*

⁹² From the original: *Força Tarefa de Finanças Sociais*

⁹³ For more information: <http://forcatarefafinancassociais.org.br/recomendacoes/>

⁹⁴ For more information: <http://gife.org.br/institutos-e-fundacoes-e-negocios-de-impacto-vamos-molhar-os-pes/>

⁹⁵ Are members: Childhood, Fundação BMW, Fundação Grupo Boticário de Proteção à Natureza, Fundação Lemann, Fundação Otacilio Coser (FOCO), Fundação Raizen, Fundação Telefônica Vivo, Fundação Tide Setúbal, Fundo Vale, Instituto Ayrton Senna, Instituto Coca-cola, Instituto Cyrela, Instituto de Cidadania Empresarial (ICE), Instituto EDP, Instituto Holcim, Instituto InterCement, Instituto Phi, Instituto Sabin, Instituto Samuel Klein, Instituto Vedacit, Instituto Votorantin e Oi Futuro. The Group has the technical support from GIFE, Phomenta e ANDE (Aspen Network of Development Entrepreneurs) and its systematized by the hired, firm Kalo Taxidi e Ponte a Ponte. It already had ponctual partnerships with Mattos Filho e Derrai & Menezes (legal firm). The three "middle" institutions defined by Os três FIIMP are: SITAWI, Bemtevi and Dinamo.

1. Peer interaction is powerful: it dilutes risks and amplifies scope

It is interesting to see how each member contributes to engaging others, whether through their influence and developments or through doubts (which are quite a few).

2. Governance is key and makes the group leave the "me" logic to the "we" logic

Working along with a group of 22 people is not an easy task to keep the group "singing the same tune", particularly considering the inherent differences in perspectives among the group members.

3. Prototyping and experimenting are great ways to "learn-by-doing" even without having all the clear answers

Inspired by entrepreneurial logic, we have put into practice and tested ideas even though they were not 100% flawless and clear. In this case, the modus operandi also constitutes an important learning.

4. Systematize and share knowledge: the process is too rich to lose insights along the way

It is basic that we hire an external support to address this issue⁹⁶, in a way that we secure all the information needed.

5. It is permitted to make mistakes: it generates knowledge, naturally keeping in mind some limits

By acting together, it is easier to risk, test, error and adjust, in the same process that startups face in their daily stages. Certainly, the error margin must be under control and in constant alignment with all the Group members.

6. Co-investment requires collaboration, sharing, and transparency. Do not just write a check

There is a lot of talk about co-investment, but beyond the financial resource itself, it requires a lot of energy, time, and engagement from people and organizations involved. The financial resource is the easiest to allocate.

7. Responsibility for the process: flexibility does not mean sloppiness. The importance of having an external audit

Hiring an external and independent auditing firm represents an important step towards assuring more security to the organizations that are part of the FIIMP and its (middle-level) partners.

8. Presence of each group member during the process increases knowledge and mutual trust

Like any group, time improves mutual trust among the members, of course as long as there is engagement and the activities that involve the Group are frequent.

9. Working in teams with clear tasks: allocating tasks

The transition from a group into a network requires time and patience. The FIIMP is still a group that aspires to become a network. Allocating tasks and building teams⁹⁷ has been an important process.

10. Simple, agile and democratic communication

Cultivating empathy has been a key to the progress of the FIIMP so far, facilitating an open discussion and strengthening mutual trust among all participants.

Just 9 months after the start of the FIIMP, there is still a lot to do. This experience has been, so far, very intense in learning and reaching collective and individual results. Everything indicates that the water is warm and more attractive for diving deeper...

⁹⁶ Kalo Taxidi e Ponte a Ponte.

⁹⁷ At the moment, there are the following teams: Coordination, Executive Board, Communication, Operations and Finance, and Legal.

Pathways in the field of social finances and social impact business for institutes and foundations to follow

There is a growing demand from institutes and foundations on how they can engage with this field, which paths to follow, and which references to look for. Some organizations have been working on these questions and proposing some paths:

- Building an ecosystem
- Testing the mechanisms
- Early stages and specific characteristics of entrepreneurs
- Training and knowledge

Building an ecosystem

As noted earlier, philanthropy has a primordial role in building, strengthening and regionalizing the ecosystem of social finance and social impact business. This kind of action requires an investor willing to take risks, in a non-financial return approach, and that brings great networking and co-branding. This includes supporting impact accelerators to expand their geographical and/or sectoral reach; encouraging the opening of new impact accelerators in regions outside the main cities; strengthening the migration of "traditional" incubators and accelerators to the field of social impact; and supporting other "middle-level" institutions in the field. There are innumerable opportunities for engaging institutes and foundations in this field, emphasizing that this is a rich environment for learning and with a lot of market intelligence. If not philanthropy, who will assume this role?

Testing the mechanisms

Learning-by-doing is the focus of this topic, inviting philanthropy to test different mechanisms of social impact investment. If giving is already a tool widely used by institutes and foundations, what about testing other ways of allocating resources to foster social impact? As we have discussed previously, the FIIMP experience has shown how rich this learning is. In addition, there are also more innovative and still less well-known mechanisms in Brazil, such as "Social Impact Bonds - SIB⁹⁸", which can also engage institutes and foundations, since there is a lot of energy needed until a contract of a SIB is signed.

Early stages and specific characteristics of entrepreneurs

It is well known in the entrepreneurial universe that there is a "death valley" for businesses that are in the early stages. In the field of social impact business the situation is similar, and there is a shortage of sources willing to take a greater risk. In addition to the so-called early stages, we also propose that entrepreneurs from the bottom of the pyramid⁹⁹, women and traditional communities, can receive more attention from philanthropic capital to develop initiatives of social impact business with these groups. There is a lot of room to create innovative solutions and to support the few existing ones that have a good connection with the territorial dimension that institutes and foundations are already quite used to dealing with.

Training and knowledge

Have you ever noticed that there is a wide range of initiatives on training, mentoring and networking for social impact entrepreneurs, and there are only a few opportunities for training institutes and foundations to engage in this field? There is a growing demand for information, studies, and publications on the overlap of philanthropy and social finance. In fact, references from other

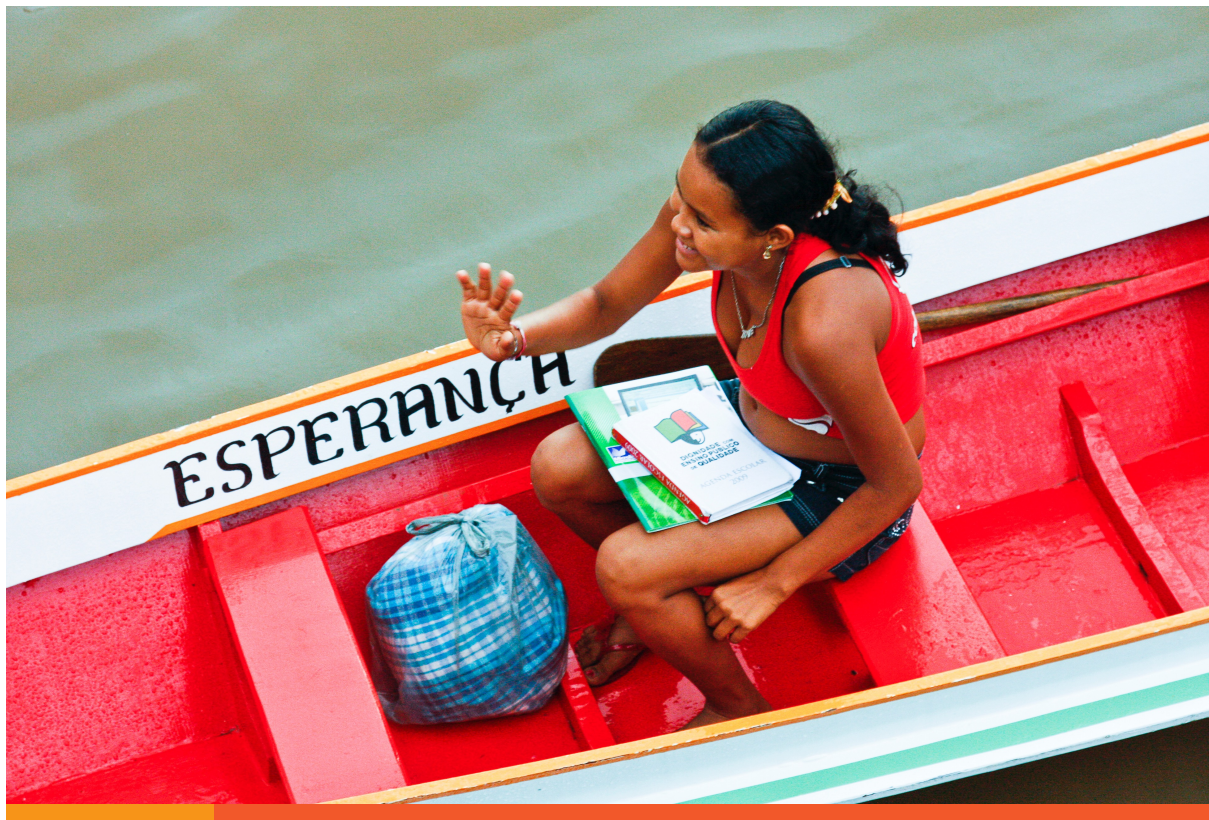
⁹⁸ For more information: <http://www.sibhub.org.br/>

⁹⁹ It is worth to highlight the initiative called "Banca". More information available at: <http://www.abanca.org/home/negocios-de-impacto-periferico-nip/>

countries portray a reality quite different from our own. We have, therefore, an excellent opportunity for institutes and foundations to engage, helping to foster training initiatives and to generate and disseminate content and knowledge about this field.

As we have seen, there are many opportunities for philanthropy to engage in the field of social finance and social impact business. The most important is that each institute and foundation is open to understand better this field in order to define its own engagement strategy. For some, the option will be to refrain from engaging with this

theme because they believe it is not aligned with their beliefs and values. For others, the main question is how to engage with it, and which paths to follow. We are convinced that it is not possible to remain indifferent about this topic - it is either to deny it or to dive straight into it. To do this, we need to understand more deeply the complexity of this new theme and the new tools that are now available in the repertoire of institutes and foundations. Regardless of each one's choices, the current social and environmental challenge is immense, and will require the input of all actors involved - philanthropy, governments, businesses, impact businesses, citizens.



Photography by Kenia Ribeiro

Conclusions

This publication brings together for the first time a strong array of pieces by leading experts who analyze the private social investment sector in Brazil in a way that anyone can gain a firm understanding of its diversity, achievements, challenges, opportunities, and risks. The writers make it clear that, in this time of profound change and self-questioning within Brazilian society, the philanthropy and impact investing sectors have a significant role to play in moving the country forward in a positive way.

The SDGs, meanwhile, are providing every country and community in the world with a way to catalyze and cohere the efforts of different sectors, communities, and leaders so that, instead of working in fragmented ways, or even working at cross-purposes, institutions can plan, implement, measure, and scale up progress along 17 distinct but interdependent dimensions of human and planetary well-being.

As noted earlier, the continent and the world watches Brazil. It has always been a leader amongst countries, but that does not diminish the challenges it faces. The chapters in this book illustrate how seriously private actors in Brazil take their responsibilities – but also how much more needs to be done. The array of opportunities covered is impressive: from working more collaboratively with those in government and the UN, to innovating through corporate philanthropy, to making diversity within the sector a higher

priority, to finding new ways to better support civil society organizations, to the ‘how to’s’ and lessons learned by family philanthropies.

This book illustrates the importance of countries drawing on their own inherent strengths and resources while, at the same time, learning lessons from other national contexts. In terms of the SDGs, it shows how important it will be to embrace the breadth of them, while encouraging individual social investors to focus deeply, and in sustained ways, on those which they find most compelling and fulfilling. It also shows that some of the ‘transversal’ SDGs – like reducing inequality and promoting peaceful and inclusive societies – are increasingly important in creating the future that Brazilians want and need.

Even in sectors that philanthropists understand well, like education, there is a recognition that private giving is not making enough of a difference yet – so more effective approaches must be found. And for themes like inequality, the philanthropy sector will need to prototype entirely new approaches, taking risks and sometimes failing, just as other countries are doing.

New currents in discourse and action, around scaling impact, systems thinking, and the use of ‘accelerators’, and collaborative pathways to achieve the SDGs, mean that the road ahead is not only a daunting one full of steep learning, but also one that is intellectually exciting. It’s up to the actors catalogued here to make the most of it.



About our partners

About Rockefeller Philanthropy Advisors

Rockefeller Philanthropy Advisors (RPA) is a nonprofit organization that currently advises on and manages over \$200 million in annual giving by individuals, families, corporations, and major foundations. Continuing the Rockefeller family's legacy of thoughtful, effective philanthropy, RPA remains at the forefront of philanthropic growth and innovation, with a diverse team led by experienced grant makers with significant depth of knowledge across the spectrum of issue areas. Founded in 2002, RPA has grown into one of the world's largest philanthropic service organizations and, as a whole, and in its 15 years has facilitated more than \$3 billion in grantmaking to nearly 70 countries. RPA also serves as a fiscal sponsor for more than 25 projects, providing governance, management, and operational infrastructure to support their charitable purposes. For more information, please visit rockpa.org.

About Foundation Center

Established in 1956, Foundation Center is the leading source of information about philanthropy worldwide. Through data, analysis, and training, it connects people who want to change the world to the resources they need to succeed. Foundation Center maintains the most comprehensive database on U.S. and, increasingly, global grant makers and their grants—a robust, accessible knowledge bank for the sector. It also operates research, education, and training programs designed to advance knowledge of philanthropy at every level. Thousands of people visit Foundation Center's website each day and are served in its five library/learning centers and at more than 470 Funding Information Network locations nationwide and around the world. For more information, please visit foundationcenter.org.

About United Nations Development Programme

UNDP works in more than 170 countries and territories, helping to achieve the eradication of poverty and the reduction of inequalities and exclusion. We help countries to develop policies, leadership skills, partnering abilities, institutional capabilities and build resilience to sustain development results. World leaders have pledged to achieve the Millennium Development Goals, including the overarching goal of cutting poverty in half by 2015. UNDP's network links and coordinates global and national efforts to reach these Goals. For more information, please visit undp.org

About Instituto C&A

Instituto C&A, the Brazilian office of C&A Foundation, is here to transform the fashion industry. We give our partners the financial support, expertise and networks so they can make the fashion industry work better for every person it touches. We do this because we believe that despite the vast and complex challenges we face, we can work together to make fashion a force for good. For more information, please visit institutocea.org.br.

About Fundação Itaú Social

Fundação Itaú Social has played a leading role in many social achievements by running programs in association with the three governmental levels, other businesses and civil society organizations. Its framework is based on four pillars: Expanded Educational Services, Educational Management, Social Mobilization and Economic Evaluation of Social Projects. For more information, please visit itausocial.org.br.

About Itaú Bank

Itaú BBA is Latin America's largest Corporate & Investment Bank and is part of the Itaú Unibanco group, one of the world's largest financial conglomerates. Itaú is a recognized benchmark for financial services that brings together the strength of a major group with the flexibility of an investment bank. As a global benchmark in investment, Itaú offers a wealth of services to companies at local, regional and global levels. For more information, please visit itau.com.br.

About Roberto Marinho Foundation

Fundação Roberto Marinho is a Brazilian foundation that promotes the right to education, encourages leadership, and works to preserve the environment and cultural heritage of Brazil. In 1977, the Roberto Marinho Foundation was founded on the premise that communication can be a tool for social change. Through collaboration with a network of public and private partners, the foundation implements programs in diverse settings connecting people, institutions, networks and ideas to create innovative education programs throughout Brazil. For more information, please visit frm.org.br.

About Globo

To be one of world's leading communications company is just possible with a lot of creativity, professionalism and investment on quality and innovation. Globo produces close to 3,000 annual hours of telenovelas and programs, as well as over 3,000 hours of telejournalism. Programs, series and interviews with a high standard of quality that every year, receive nominations in the International Emmy Awards. Presently, the network covers 98.6% of Brazil's territory, reaching 99.6% of the population with the greatest network of affiliated broadcasting stations of 123 spread over the states. More than 90% of the network's programming is produced in-house, which makes Globo the country's largest job provider for artists, authors, journalists and producers. Globo currently has

approximately 12000 employees. For more information, please visit redeglobo.com.br.

About Banco do Brasil Foundation

Banco do Brasil Foundation has structured its activities to identify and mobilize different social actors in the search for effective solutions to fundamental aspects of the sustainable development of Brazilian communities. In the last ten years, from 2007 to 2016, 3.8 million people have had their lives transformed by more than 6.5 thousand projects, in more than 2 thousand Brazilian municipalities and a social investment totaling R\$ 2.6 billion Brazilian reais. The Foundation's mission is to improve people's lives by promoting socio-productive inclusion, sustainable development and social technologies. For more information, please visit: www.fbb.org.br

About Sabin Institute

Sabin Institute is a non-profit organization created in 2005 with the mission of gathering and formalizing the social responsibility practices exercised by Sabin Laboratories. Currently, Sabin Institute has the mission to promote and improve the quality of life of communities where the Sabin Group operates, especially in the areas of health, sports and education. By 2017, over 850,000 people had been impacted by the Institute's actions, projects and partnerships. For more information, please visit: institutosabin.org.br

About Humanize Institute

Established in September 2017, the Humanize Institute is a non-profit organization that works under the Sustainability and Social Equity axes supporting and/or articulating support to groups and initiatives that develop projects, programs or events geared towards the society, the environment, education and the improvement of quality of life in Brazil.

About GIFE

GIFE is a non-profit organization that brings together business, family, independent or

community members who invest in public-purpose projects. Created as an informal group in 1989, it was constituted as a Group of Institutes, Foundations, and Companies in 1995 by 25 organizations. Since then, it has become a reference in Brazil on private social investment and has been contributing to the development of similar organizations in other countries. GIFE network is marked by the diversity of its investors and brings together today more than 130 members. The organization generates knowledge from network articulations to improve the institutional political environment of social investment and of increasing the quality, legitimacy and relevance of private social investor's actions. For more information, please visit gife.org

About Comunitas

Comunitas is a Brazilian civil society organization whose objective is to contribute to the improvement of corporate social investments and encourage the participation of the private sector in the social and economic development of the country. For this purpose, Comunitas encourages different actions in partnerships with business leaders, committed to the objectives of the organization. Annual Meeting of Leaders and the Joint Program for Sustainable Development foster the dialogue on national challenges, as well as the participation of private sector in local development and support for the improvement of public services in several Brazilian municipalities. The Benchmarking survey of Corporate Social Investment (BISC), in turn, brings valuable contributions to the work of the organization and provides parameters on private social investment in Brazil, following the evolution of the social commitments of the participating companies. For more information, please visit comunitas.org.

About IDIS - Instituto para o Desenvolvimento do Investimento Social

IDIS is an organization that support private social investment for the development of a more just and sustainable society. IDIS works in two ways: by developing proactive initiatives and meeting the demand for technical support from companies, foundations, institutes and individuals. Both initiatives and technical support depend on the establishment of partnerships. Joint learning, transparency and co-responsibility are values that permeate these partnerships. IDIS' commitment to social development is expressed through the increased impact of private social investment. Acting as a civil society organization legitimizes the mission of IDIS because it depends on the support of diverse stakeholders to exist. For more information, please visit idis.org

About WINGS – World Initiatives for Grantmaker Support

WINGS is a network of about 100 philanthropy associations and support organizations in 40 countries around the world whose purpose is to strengthen, promote and provide leadership on the development of philanthropy and social investment. Wings members are supporting a total of 100.000 philanthropy organizations. For more information, please visit wingsweb.org



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