



IPASA

INDEPENDENT PHILANTHROPY
ASSOCIATION SOUTH AFRICA

GRANT CRAFT TOOLKIT



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W I N G S
ELEVATING PHILANTHROPY

Supported by WINGS Unlocking
Philanthropy's Potential Project

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IPASA Members contributed by sharing their experience and insights by presenting at and participating in IPASA's Grant Craft workshop series.

DISCLAIMER

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ABOUT THE TOOLKIT

HOW THE TOOLKIT IS ORGANISED

This toolkit is organised into two main sections: the context in which grant-making and grant management takes place; and grant-making and grant management practices. The toolkit includes resources for further reading.

This is the first version of a document that will remain a “work-in progress” product, in the sense that IPASA will be adding to the document on an ongoing basis, as we learn from the practices of our members, and developments in the philanthropy sector in general.

The format of the toolkit is as follows:

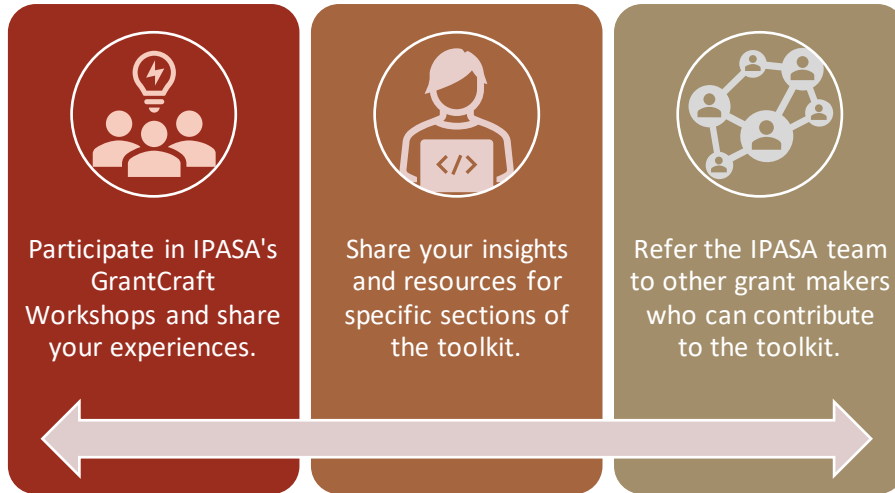
- Each chapter in the toolkit and each subsection starts with an introductory paragraph that frames the section: why this topic is important, what the current debates and trends are regarding the topic, and what the key challenges are.
- Each section also includes a list of information resources on the topic, categorised in terms of:
 - RESOURCES: General resources, including articles, blog posts, podcasts, webinar recordings, reports, templates, and toolkits.
 - IPASA RESOURCES: Some sections also include newsletter articles, stories or case studies developed by IPASA members.
 - IPASA MEMBER-ONLY RESOURCES: Where relevant, summaries are provided of take-aways of IPASA’s grant craft workshops on specific topics, and links to workshop summaries and presentations are included. Links to IPASA member-only workshop summaries and presentations are accessible for IPASA members only.
- The last section in the document provides a list of books on philanthropy and other philanthropy toolkits.

MORE ABOUT THE RESOURCES IN THE TOOLKIT

The resources made available under each section is carefully curated to provide toolkit users/readers with the latest information on the topic at hand. These resources are specific to independent foundations and reflect the issues that are pertinent to philanthropic funders. Some resources may be relevant to philanthropy globally, but as far as possible, we have made resources available that are relevant to funders in the Global South, and specifically funders in South Africa. The inclusion of resources originating from IPASA’s convenings, knowledge harvesting, research and publications provides easy access to information relevant to South African Philanthropy.

HOW IPASA MEMBERS CAN CONTRIBUTE TO THIS TOOLKIT

We would like to keep on updating this toolkit and IPASA members can contribute to this toolkit in three different ways: participation, information sharing, and networking.



OTHER IPASA TOOLKITS

This toolkit is one in a set of IPASA toolkits and guidelines that include:

- [Good Governance and Foundations: A Practical Guide](#)
- [Trust-Based Partnerships Growth Pack](#)
- [Climate Crisis Toolkit and Resource Pack](#)
- Early Childhood Development (ECD) Funders Guidelines
- [After School Programme \(ASP\) Funders Guidelines](#)

ACRONYMS

ASP	After School Programme(s)
BEE	Black Economic Empowerment
CAPSI	Centre on African Philanthropy and Social Investment
CDRA	Community Development Resource Association
CEO	Chief Executive Officer
CSI	Corporate Social Investment
CSP	Centre for Strategic Philanthropy (University of Cambridge Judge Business School)
DEI	Diversity, Equity, and Inclusion
ECD	Early Childhood Development
GBV	Gender-Based Violence
GBVF	Gender-Based Violence and Femicide
IoDSA	Institute of Directors South Africa
IPASA	Independent Philanthropy Association of South Africa
M&E	Monitoring and Evaluation
MEL	Monitoring, Evaluation and Learning
MERL	Monitoring, Evaluation, Reporting and Learning
NASCEE	National Association of Change Entities in Education
OECD	Organisation for Economic Cooperation and Development
SASB	South African Standards Board
SCAT	Social Change Assistance Trust
SDGs	Sustainable Development Goals
SRHR	Sexual and Reproductive Health Rights
ToC	Theory of Change
UN	United Nations
WINGS	Worldwide Initiative for Grantmaker Support

CONTEXT

This section covers aspects that contextualise grant-making and grant management practices. It looks at governance and guiding principles, provides ideas regarding strategy development, and discusses different funding approaches and mechanisms.

1. GOVERNANCE, TRANSPARENCY, ACCOUNTABILITY AND TRUST

Governance, transparency, accountability, and trust in the philanthropy sector are closely related and mutually reinforcing. While accountability promotes transparency because information is shared, accountability entails more than sharing information. Good governance promotes accountability and transparency, which in turn builds trust. However, the relationship is multi-dimensional, and it can be expected that in an environment where there are higher levels of trust, transparency will be promoted. In the section below, we take a closer look at governance; transparency and accountability; and trust.

1.1 GOVERNANCE

Governance relates to the processes and structures that are used by an organisation to steer and manage its general operations, programmes, and projects. It includes the structures, function, responsibilities, processes and practices that are used to achieve the organisation's mission, and it also includes the culture of the organisation. An organisation's governance principles and management practices are critical in determining the effectiveness, success and sustainability of organisations. Good governance is an integral part of all organisations, whether they are in the public, private or non-profit sector. Non-profit Organisations (NPOs) that deliver services for the common good of society, or public benefit are increasingly under pressure to show that they are accountable for their stated goals, and they are expected to demonstrate their governance capacity in a transparent manner. Governance in the philanthropic sector is important for philanthropic organisations, the organisations in which they invest, and the organisations they fund.



RESOURCES

- **Good governance, transparency and accountability are thin on the ground in South Africa – civil society must lead the way.** In this article, Shelagh Gastrow highlights the challenges regarding transparency and accountability in South African Philanthropy. Read it [here](#).
- **Form and Function: a view of the financial and operational practices of South African private philanthropic foundations.** This research report by Shelagh Gastrow and Amanda Bloch provides an overview of the practices of foundations in South Africa in a wide range of grant-making and management areas. Read it [here](#).
- **The Governance and Management Processes of Family Foundations in South Africa** by Sufiya Najjaar, Investec Philanthropy Officer [View](#)
- **WINGS Transparency and Accountability Toolkit.** This guide for international grant makers and organisations provides guidance on how to approach issues of accountability and transparency in

philanthropy. The document includes advice for domestic giving, and for cross-border philanthropy issues where organisations and states don't necessarily share the same standards with their partners. This toolkit incorporates contributions from philanthropy role players in the global South. Read it [here](#). The toolkit launch can be accessed [here](#). This resource is currently being updated and the new version will be launched in 2023.

- **Improving Philanthropy's Enabling Environment. WINGS Advocacy Strategy.** Through this document WINGS wants to bring the voices of its stakeholders into global policy debates. The strategy can be customised to different regional realities and provides tools to analyse the philanthropy ecosystem or advocate for better policies and issues, including transparency and accountability. Read it [here](#)

IPASA RESOURCES

- IPASA's **Good Governance and Foundations: A Practical Guide** provides expert advice on good governance in philanthropy organisations. Read it [here](#).
- **Good governance and transparency - building blocks of trust.** Anna Vyanos explains how philanthropic partners can demonstrate their trustworthiness by showing meaningful commitment to good governance, and transparency in the sharing of appropriate information. Read it [here](#).
- **Innovation at Board Level – Experiences with a Junior Board.** Heather Cooper, South African Director of the TK Foundation explains the rationale for the Foundation's Junior Board, and how this innovative concept works in practice. This article touches on key aspects of intergenerational dynamics in grant-making. [Read more](#)

IPASA MEMBER-ONLY RESOURCES

IPASA held a **Grant Craft Workshop on Governance and Accountability** on 2 August 2022, where our members had the opportunity to discuss their learnings and experiences with accountability, trust, and transparency in philanthropy. This workshop followed on two IPASA workshops in 2022 for Board members and CEOs where training was provided on the strengthening of boards of philanthropic foundations. In this workshop Investec's Wealth & Investment's strategic philanthropy team presented on the governance requirements for corporate and private philanthropy, and an independent philanthropy consultant for the Hans Hoheisen Charitable Trust provided insights on governance and accountability from her experience as a philanthropic advisor. The Lewis Foundation shared their foundation's experiences of conducting an internal governance review. Read more [here](#).

1.2 TRANSPARENCY AND ACCOUNTABILITY

Transparency and accountability are often used interchangeably, but while these concepts are related, there are also differences. Transparency is about making information publicly available, and accountability requires reporting against certain goals and indicators. In South Africa, transparency and accountability in the philanthropy sector remains somewhat of a challenge, and private independent philanthropy is not very well documented.

Corporate Social Investment (CSI) is better documented, and in this regard the annual *Dialogue Business in Society Handbook* plays an important role to gather and share information on CSI funders, their focus areas, and their achievements. There is, however, no obligation on CSI funders to participate in this research, and as far as private independent philanthropy is concerned, there is no systematic annual research initiatives that endeavour to capture the nature, magnitude, focus and impact of funders.

Some efforts has been made to document philanthropic funding, but “reliable, comparable and publicly available information on philanthropic funding, priorities and behaviours” remains scarce, according to the [Organisation on Economic Cooperation and Development](#) (OECD). The true scale of philanthropic giving in South Africa is not known, and while some philanthropists are starting to share more information publicly about the extent of their philanthropy, many private philanthropic funders “tend to operate under the radar” and keep their giving anonymous. This, combined with the confidentiality of tax information under South African law means that a single and comprehensive resource on the South African philanthropy landscape is not yet available.

Regarding accountability, some philanthropic funders and custodians of philanthropic funding may argue that all is well as long as funding is used in line with the wishes of the funders and may therefore focus on accountability to the founders and boards of their trusts or funds. Calls for higher levels of accountability, including accountability towards society in general, and towards the communities that benefit from philanthropic giving are mounting. Data sharing is one of the ways in which philanthropic funders can enhance their transparency and accountability.

Transparency can also assist with coordination and collaboration in the philanthropy sector and given that one of IPASA’s key objectives is to promote and facilitate coordination and collaboration in the philanthropy sector, IPASA has supported and initiated and supported research initiatives that are aimed at better understanding the funding practices and funders of specific focus areas better.



RESOURCES

- **The Giving Report.** The Nedbank Private Wealth report provides first-hand insights on high-net-worth giving in South Africa. Read it [here](#). A new version of this report should be available shortly.
- **The Empowerment Endowment. A study of trusts and foundations established from South Africa’s black economic empowerment transactions.** This study provides information on the focus areas of South African Black Economic Empowerment (BEE) trusts and foundations. Read it [here](#).
- **Private Philanthropy for Development – Second Edition: Data for Action, The Development Dimension.** This report from the OECD aims to meet the growing demand for open, reliable, and comparable data on philanthropic giving. Compared to the first edition, it collected more data from large foundations and other organisations based in developing countries to have a more comprehensive understanding of cross-border financing and domestic giving. Read it [here](#).
- **Global Philanthropy Tracker: South Africa.** This document provides a high-level overview of philanthropy in South Africa. Read it [here](#).
- **Funding Finder.** This is the Inyathelo Donor Directory. Read it [here](#).
- **A Rebalancing Act: How funders can address power dynamics.** This paper provides practical guidance on what funders should focus on and actions they could take. Read it [here](#).
- **Transparency and accountability in philanthropy and private social investment.** WINGS developed an online toolkit for their members to advance their practice and understanding of transparency and accountability for philanthropy. Read it [here](#).

- The Center for Effective Philanthropy conducted a study to examine the perspectives of Foundation CEOs' views on transparency. Read **Sharing What Matters: Foundation Transparency**, [here](#).

IPASA RESOURCES

- IPASA has produced two research reports on the Early Childhood Development sector. The 2021 **Funder Survey Early Learning in South Africa** is available [here](#), and the 2022 **ECD Funding Landscape Survey** is available [here](#).
- The **IPASA ECD Funder Database 2022** is available [here](#).
- IPASA's **Funding After School Programmes in South Africa Report** is available [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA promotes information-sharing in the philanthropy sector in general, but also creates a platform for IPASA members to share information with their peers about funding focus areas, and resources in the philanthropy sector. The IPASA Member Portal contains various resources, including member profiles and a directory of reputable recommended philanthropy consultants and service providers. IPASA members can access the member portal [here](#). Funders who are not yet IPASA members can apply [here](#).

1.3 TRUST

Trust in philanthropy relates to other themes like transparency, accountability, and partnership. Trust can be seen as a pre-condition for transparency, but trust could be also a result of transparency. At the same time, the assumption is that accountability could also engender trust, or lead to the erosion of trust if accountability shows up flaws and challenges that were previously unknown. Trust is also an essential component of partnerships, which should ideally be underpinned by relationships built on trust. In philanthropy, trust relationships at various levels are important: within foundations; between funders and recipients of funding; between foundations and other funders; between foundations and society.

IPASA implemented a trust-based partnership workshop series in 2022, for IPASA members and members of the National Association of Social Change Entities in Education (NASCEE). Key takeaways from this series include that building trust relationships and partnerships takes time and requires active listening between the parties involved. The importance of building trust between funders and recipients of funding as an essential component of shifting the power and moving towards equitable funding practices were highlighted.

There is an active ongoing nuanced debate on trust-based philanthropy with perspectives that range from caution about the potential pitfalls and blind spots of trust-based approaches, to those who propose total trust. This is an important debate, and it is essential that the philanthropy sector share learnings and experiences regarding trust, to strengthen the sector and its practices.



RESOURCES

- **Return on relationships: Four ingredients of trust.** David Ehrlichman explains that while most people will acknowledge that trust is important, many may see it as a by-product of other activities, rather than something that should be cultivated deliberately. Read it [here](#).
- **The Trust-Based Philanthropy Project** provides online resources based on clearly articulated values that inform six key practices. It also provides guidance regarding funders' culture, structures, leadership, and practices. Find out more and download the Trust-Based Philanthropy in 4D Guide [here](#).
- **Is the trust-based philanthropy bubble about to burst?** by Charles Keidan, poses thought-provoking questions about trust-based philanthropy, and refers to the "shadow side" of trust-based giving. Read it [here](#).
- **It's time to ditch the mantra of trust-based philanthropy** by Simon Sommer, argues that the demand for trust-based philanthropy is naïve, potentially counterproductive, and dangerous. Sommer says the solution lies in unbiased funding. Read it [here](#).
- **We're here to clear the air on what trust-based philanthropy is and what it isn't** by Carrie Avery, Pia Infante, Philip Li, and Brenda Solorzano, contends that there are misunderstandings and misconceptions about trust-based philanthropy that need to be clarified. Read it [here](#).
- The **Funding from a Place of Trust** report, commissioned by the Citi Foundation and produced by Synergos, explores how the provision of general operating support and capacity building can help donors improve the impact of non-profit organizations and in turn the communities they serve. Read it [here](#).
- **Trusted partnership: pushing the boundaries of traditional grant-making and trust-based philanthropy.** This article by Anna Hirsch-Holland provides four suggestions for funders to become trusted partners to their grantees. Read it [here](#).
- **Equity, proximity, and trust: How philanthropy measures up to its aspirations.** Kathy Reich, from the Ford Foundation, and Nidhi Sahni, from Bridgespan in conversation with Rachel Flynn from the Skoll Foundation on trends in the funder landscape. Read it [here](#).

IPASA RESOURCES

- **Humility – the key requirement for trust-based philanthropy.** Sarah Rennie, former IPASA Council Chair shares her experiences, insights, and learnings with us through a reflection of IPASA's journey and achievements over the past few years. Read it [here](#).
- **Towards trust-based partnership - opening pathways for conversation** Robyn Whittaker provides insights into trust-based philanthropy and partnerships, and the IPASA and NASCEE dialogues. Read it [here](#).
- **Trauma and trust.** Grant Stewart shares his belief that philanthropy engages in issues that are partially shaped by trauma, and that funders should therefore integrate a trauma lens into their work to transform the sector. Read it [here](#).
- **Towards Trust Based Partnerships: A Case Study of Emerging Collective Partnership between a Philanthropic Network and a National Association of Social Change Entities (NASCEE) in South Africa.** This case study captures the shared events and dialogues between IPASA and NASCEE during

2021 and 2022. It specifically focuses on the evolution and outcomes of three-part workshop series that took place in 2022, with the title “Towards Trust-Based Partnerships”. Read it here. (Pending publication)

- **Trust-Based Philanthropy: A Growth Pack to Support Trust-Based Partnerships.** IPASA has developed this resource to support funders and implementing partners who are striving to deepen the level of connection, trust, and mutual support in their partnerships. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA’s workshops on community-focused philanthropy and core funding also included deliberations on trust-based philanthropy. See Sections [3.3](#) and [4.1](#) for more information.

2. STRATEGY

The strategies of philanthropic organisations are based on the issues and funding sectors that are identified in philanthropic organisations’ mandates and relate to development challenges in society. Philanthropic funders may align their funding to government priorities and needs or align their strategies to the United Nations’ Sustainable Development Goals but the extent to which this is done vary.

With philanthropic foundations that were formed a long time ago, it could be challenging to align the funders’ selected focus areas with current day challenges and priorities. Carefully thought through strategies are needed to ensure ongoing relevance and optimal impact. Strategy development for all philanthropic funders should consider how the best possible impact can be achieved with the funding that is available, what success will look like, and how it will be measured.

The interconnectedness of societal problems and associated complexity, and increasingly rapid change and heightened awareness regarding the importance of addressing the root causes of problems demand deep evidence-based understanding of issues and requires focus and regular reflection and adjustment.

2.1 STRATEGY DEVELOPMENT AND REVIEW

Increasingly, funders are faced with rapidly changing situations and crises related to health and climate issues. A well-thought through strategy enables organisations to be proactive, and to respond rapidly to changing situations.

It is important to anchor strategy in a Theory of Change (ToC) which describes a process of planned social change, from the assumptions that guide its design to the long-term goals it seeks to achieve. It draws logical connections between activities and outcomes and interrogates the assumptions that underpin programme design. A ToC also provides a guide for planning, implementing, and evaluating an initiative, and gives clarity on exactly how an initiative will bring about the change that is required to achieve the strategic goal.

Regular reflection on the success of strategies, is an important tool to ensure that strategy remains relevant and responsive to changes in the environment. Strategic review can take place periodically, or on a regular basis, and at different levels of scale. Strategic review processes can either be through formal and comprehensive strategy review processes or through informal reflective practices.

Irrespective of the form and the magnitude of a strategy review process, a critical factor is to be willing to take an honest look at existing strategies, how they respond to the current environment, and if they achieve the best possible results. Ideally strategy development and review should be evidence-based, and research from other parties could be useful to draw on, as well as research commissioned by funders themselves, and project and programme evaluations and learning.

In line with the #ShiftThePower movement, involving stakeholders other than foundation board members and staff must be considered. Including a wide range of stakeholders in strategy development and review processes could be highly productive and could assist philanthropy organisations to focus better on what matters most.



RESOURCES

- **Donor Intent Is Critical to Strategic Philanthropy.** This article argues that donor intent, which centres on what philanthropists choose to fund, and how the wishes of donors are honoured in a changing world could be less of a limitation than expected and can serve as a framework for foundations to liberate their creativity. Read it [here](#).
- **How to Create Effective Philanthropy: Six Questions to Guide Donors.** This article acknowledges the complexity of philanthropy and the difficult decisions funders face. These questions are designed to assist funders to get clarity and focus. Read it [here](#).
- **Narrative Emergency Kit: How should we prepare for the next crisis?** Brett Davidson explains how storytelling can be used to shift the narrative regarding crisis events, and how funders can prepare in advance for unpredictable events that are difficult to build into strategy. Read it [here](#).
- **Balancing strategic philanthropy with emergency responses.** The results from IPASA's member survey on emergency responses to the July unrest shows that IPASA members are able to respond effectively to emergencies in line with their respective mandates and strategic focus areas. Read it [here](#).
- **The Centre on African Philanthropy and Social Investment (CAPSI)** has published a series of case studies on African Philanthropy in collaboration with the Wits Business School's Case Centre, including cases on changes in structure and strategy at the Southern African Trust. Read it [here](#).
- **Advising Philanthropy for Greater Societal Impact.** This Bridgespan article explains how philanthropy can achieve greater societal impact. Read it [here](#).
- **What's Next for Philanthropy in the 2020s - Seeing Philanthropy in a New Light.** This report from [Monitor Institute by Deloitte](#) offers insight into the changing field of philanthropy, serves as a call to action and provides resources for helping funders to re-examine their work. Read it [here](#).
- **Disruptive philanthropists. How a new wave of modern philanthropists is shaping tomorrow.** Based on surveys and in-depth interviews with select philanthropists around the world, KPMG has compiled this report on how leading philanthropists support various causes and their approaches, successes, and learnings. The report highlights novel approaches, collaboration strategies, and emerging trends in philanthropy which can be useful to others seeking to maximize their philanthropic impact. Read it [here](#).
- **Can co-leadership be the future of philanthropy?** This article provides insights in the type of resilient and adaptable leadership that is required in a complex and rapidly changing world. Read it [here](#).

- **Mapping Change. Using a Theory of Change to Guide Planning and Evaluation.** An easy-to-use resource from GrantCraft at the Foundation Center which provides succinct information on what a ToC is, why it is useful, how it can form the basis for strategic planning, and it addressed common questions about using a ToC. Read it [here](#).
- **Theory of Change Tool Manual.** A manual from the International Network on Strategic Philanthropy that provides a tool for creating a framework for change in the form of a ToC or Logic Model, which maps out how an initiative will achieve change, and how success will be measured. Read it [here](#).
- **Theories of Change.** This National Center for Family Philanthropy website features a collection of resources that include guides and case studies for family foundations and others seeking to create a Theory of Change (ToC) for their philanthropic strategies. Read it [here](#).
- **The Problem with the Genius Billionaire Philanthropist Superhero.** A critical reflection on philanthropists and the systems which operate within philanthropy and grapples with questions regarding inequity and shows examples of unconventional approaches to philanthropy. [Read article](#)

IPASA RESOURCES

- **Why philanthropists should hold up the mirror and take an honest look.** This article by Tracey Webster from the Oppenheimer Memorial Trust (OMT) reflects on the OMT's comprehensive strategic review in 2021 combined with an impact assessment of their work over the past 20 years. Read it [here](#).

2.2 STRATEGIC FOCUS AND FLEXIBILITY

The complexity of current challenges, combined with rapid and unpredictable change demands that philanthropy builds flexibility into strategy, so that it is possible to respond to changing situations in a more prepared manner. A flexible strategy in times of uncertainty requires a strong focus on the organisation's mission and being clear on what needs to be prioritised.

A strategic plan that considers different possible future scenarios will enable funders to adapt to unforeseen changes. Scenarios can provide the insight, innovative ideas, and decision-making tools needed in times of crisis. The philanthropy sector has been resilient and managed to adapt to recent crisis, but the need to get better at having alternative plans in place, and to respond more quickly to rapidly changing realities on the ground, was highlighted by the Covid-19 crisis and severe climate events. Planning informed decision-making can play a major role in keeping organisations and their leaders relevant and effective in times of quick and large-scale change.

Scenario planning is a useful tool for philanthropy to consider different futures. Funders can plan their own scenarios or tap into scenarios developed by others in their field of focus or other relevant scenarios. South Africa is no stranger to scenarios and since the 1990's a wide range of scenarios have been developed. (See the text box below for some of these scenarios). Some of them may remain useful, others may need some adaptation. These scenarios nevertheless provide an idea on what scenarios could look like in the South African context. See [Annexure A](#).



RESOURCES

- **Five Traits of Adaptive Philanthropists.** Flexibility in a fast-changing world is important and funders can be more flexible if they have an adaptive strategy. Read more here. Read it [here](#).
- **Five Ways to Move from Strategic to Adaptive Philanthropy.** This article provides practical advice on how to move from a traditional approach to strategy to an adaptive one, and how to be responsive to unpredictable changes. Read it [here](#).
- **Making Sense of Uncertainty: Nonprofit Scenario Planning.** In this article, Bridgespan explains how scenario planning can help to navigate uncertainty while providing structure around making key strategic decisions. The article includes a link to a Scenario Planning Toolkit, Read more [here](#). Download it the toolkit [here](#).
- **COVID-19 scenario planning for non-profit and philanthropic organizations: Navigating uncertainties in the social sector.** This Deloitte report is based on interviews in 2020, and explores assumptions, uncertainties, scenarios for the social sector, next steps and take-aways for the sector. Read it [here](#).
- **Preparing for an Uncertain Future.** Carolin Gomulia interviews Reana Rossouw, the owner of Next Generation Consultants, about how professionals in the development and humanitarian ecosystem can prepare for the future. Read it [here](#).

IPASA RESOURCES

Balancing strategic philanthropy with emergency responses. The results from IPASA's member survey on emergency responses to the July unrest shows that IPASA members are able to respond effectively to emergencies in line with their respective mandates and strategic focus areas. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

Developing scenarios for the future of philanthropy. Reana Rossouw, of Next Generation Consultants has developed 4 possible scenarios for the future, based on trends influencing the future of philanthropy. The scenarios developed are:

Pulling apart – going separately

Going slowly – act to avoid or reduce harm

Coming together – go to wide to benefit many stakeholders

Go deep to contribute to systemic solutions

Read it [here](#).

2.3 SYSTEMS THINKING AND SYSTEMS CHANGE

The complex nature of multiple societal challenges require that funders think carefully about how best to focus their giving, and how they could possibly address issues systemically and comprehensively. It is also important for funders to understand the root causes of problems, and how they are embedded in existing structures and power relationships.

Systems change is necessary at all levels of system, from micro, to meso, and macro systems. When considering how to approach systems change, funders need to be conscious of their own position in the systems in which they function. Systems change also involve reflecting on the philanthropy ecosystem and what needs to change in that ecosystem. When considering how to engage with systems change, it is inevitable that issues such as intersectionality of development issues, as well as structures in society, sectoral stakeholder dynamics, power relations and decolonisation will come up. This demonstrates the complexity in which funders operate, and that it is essential for funders to engage with and understand these issues.

Connecting social justice and systems change provides opportunities for funders to move beyond alleviating symptoms of deep-rooted problems in society, and to change unjust systems. Both systems change and social justice are concepts that may seem vague, theoretical, and elusive. However, the social justice-systems change nexus may provide a way to come to grips with both topics. The interface between social justice and systems change became clear during the Covid-19 pandemic, which highlighted the fault lines in society, demonstrated how vulnerable groups are disproportionately affected by adverse events, and that funders can no longer shy away from tackling the root causes of the multiple and complex crises we face.



RESOURCES

Systems change

- **Systems Change: Making the Aspirational Actionable.** In this article by Alison Badgett, she explains how a systems change approach can be used to redress the root causes of social problems. The article also provides guidance on how to develop systems change plans. Read more [here](#).
- **Doing Deeper Work: 3 Things to Learn About The Process Of Systems Change.** François Bonnici shares three successful social change systems work examples that embody key principles for responding more effectively to build a more inclusive and sustainable world. Read it [here](#).
- **Ten Lessons from Covid for Stepping into the Decade of Transformation.** Otto Scharmer, Co-Founder of The Presencing Institute, reflects on current developments and trends which suggests that the world may be on the verge of far-reaching change that will not only change social structures, but which may shift human consciousness in a way that will enable transformational change. Read it [here](#).
- **Solidarity over charity: Prioritising long-term shifts over band-aid responses.** Sadaf Shallwani writes that charitable giving has failed to produce deep, systemic change, and has rather intensified systematic challenges. In addressing these challenges, Sadaf writes that solidarity over charity is the best approach in driving a more equitable society. Read it [here](#).

- **All hands on deck: Philanthropy’s extraordinary moment. Philanthropic Capital Must Play a Bigger Role in Driving the Systems Shift We Need.** This article explains how philanthropy can play a role in effecting systems change. Read it [here](#).
- **Wealth, power, and social change: funding at a systemic level.** Shivani Garg Patel from the Skoll Foundation talks to Alix-Ines Lebec about the full range of philanthropic financial levers can be deployed to fund social change on a systemic level. Read it [here](#).
- Skoll Foundation interview with Shivani Garg-Patel, Skoll Foundation Chief Strategy Officer, in their series, “**Wealth, power and social change: Funding at a systemic level**”. See it [here](#).
- **Equipping change leaders to reimagine and reset our broken systems.** Peter Drobac from the Skoll Centre for Social Entrepreneurship outlines the rationale for undertaking an in-depth study, to determine the impact of the Skoll Scholarship programme. Read it [here](#). The full report is available [here](#).
- **Does philanthropy have too much influence? Or not enough?** In this article Halima Mohamed asks questions about the power of institutionalised philanthropy on influencing policies and agendas targeting systemic injustices and the potential institutionalised philanthropy holds to enable systemic change. Read it [here](#).
- **The 10 Things You Need to Know about Acting Together to Lift Up Philanthropy.** This summary explains the structure and functions of the philanthropy support ecosystem and shows how it can enhance its efficiency and effectiveness. Read it [here](#).
- **Here’s how the positive changes in individual and institutional philanthropy sparked by the COVID-19 pandemic can take root and grow.** This McKinsey report sees the Covid-19 pandemic as a transformative moment for philanthropy, which has shown the sector at its best. The report proposes five practices to build on during the recovery. Read it [here](#).
- **Unlocking philanthropy’s potential What funders can do to build strong philanthropy support ecosystems.** This guide is aimed at helping funders understand how they can contribute to unlocking philanthropy’s potential to build more resilient, sustainable and democratic societies. Read it [here](#).
- **Embracing Complexity: Towards a shared understanding of funding systems change.** This report is a collaborative effort of funders, intermediaries and systems change leaders aimed at sending a signal to the social sector funding community, including philanthropy, that funding practices need to evolve to better support systems change initiatives. Read it [here](#).
- **Systems Change Philanthropy: An Initial Landscape of Actors, Initiatives, and Resources.** This 10-page document from the Chandler Foundation provides a comprehensive collection of resources relevant to systems change in philanthropy. Read it [here](#).
- **System Change in Philanthropy for Development - A Research Framework for Global Growth Markets.** This landmark report by the Centre for Strategic Philanthropy at the University of Cambridge Judge Business School uses insights from philanthropy in the Global South to determine an academically rigorous research agenda to improve philanthropy in Africa, the Middle East, and Southeast Asia. Read it [here](#).
- **2030 Catalyst Report: From Crisis to Systems Change.** This report provides ideas and recommendations to transform what was not working, even before the pandemic. One of the key messages in this report is that systems change is needed. Read it [here](#).

IPASA RESOURCES

- **A call to action: A strategic role for philanthropy in South Africa.** In this article, the RAITH Foundation reminds us of philanthropy’s role to promote social justice and to help find solutions for the root causes of marginalisation and exclusion. Read it [here](#).
- **Philanthropy and systems change.** The future of philanthropy starts now! Dr Louis Klein, Secretary-General of the International Federation for Systems Research and Dean of the European School of

Governance, reflects on the learnings and outcomes from the 2021 IPASA symposium and how we take these learnings forward. [Read more](#)

- **When scale is not enough: To tackle youth unemployment in South Africa, we need systems change: Reflecting on the complex and severe youth unemployment crisis in SA.** Harambee Youth Employment Accelerator highlights the need for systems change, which recognizes and address the complexity of the challenge to go farther and faster together. Read it [here](#).
- **What can philanthropy do to stimulate deep systems change?** In this article Reos Partners explores how philanthropy organisations can better collaborate, listen to the emerging needs they look to address, and more clearly understand their role in the ecosystems in which they work. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

Systemic change in an age of disruption – how does philanthropy shift from ‘Ego-system to Eco-system’ awareness and action? This presentation by Marian Goodman from the Presencing Institute at the 2021 IPASA Annual Symposium provided insight on what is required to effect system transformation. Read it [here](#).

2.4 INTERSECTIONALITY AND CROSS-CUTTING ISSUES

When engaging with complex social problems, intersections between different issues are inevitable. Intersectionality could be regarded as a problem in that it requires thinking about a specific issue or sector in different ways. It requires unlearning to look at a problem in a multi-dimensional way and invites us to embrace complexity. Awareness of, and knowledge about how cross-cutting issues intersect with primary focus is essential. This approach also fits in with examining the root causes of problems and the interrelatedness of the issues funders seek to address. Often dealing with intersectionality requires that we interrogate the assumptions that underpin our ToC.

When considering intersectional themes, we could think about using lenses to look at an issue, and this assists with the development of interventions that are multi-dimensional, and where different aspects and nuances of a problem, or a sector are considered. There are multiple lenses that can be used to explore intersectionality, and these lenses could relate to specific vulnerabilities (e.g., gender, youth, older persons, and disability); or it could relate to system-wide problems that affect every aspect of human life and development (e.g., climate change, mental health, and social justice).

APPLYING MORE THAN ONE LENS TO AN ISSUE

*The way in which funders can apply more than one lens to an issue is explained in the example of an **education project**.*

*Funders can consider how different stakeholders in the education system, and different aspects of education delivery are affected by **climate change**.*

*In addition, or alternatively, funders can consider **gender** issues in education - for example what the differential impact of lack of sanitation at schools is on girls and on boys.*

*A further aspect to consider may be the impact of **mental health** issues on teachers and on learners in terms of how teachers fulfil their roles in the education system, or how it impacts on learners' educational attainment. When developing an educational intervention, we may be assuming (without being conscious of the assumption) that all learners pitch up for school ready to learn. That may not be the case, particularly where*

learners are exposed to high levels of trauma because of climate related disruptions or gender-based violence. In such situations, it would be essential to integrate mental wellbeing components into a programme.

When interrogating intersectional themes, stakeholder participation is important (see Section 3.2) to ensure that funders understand the complexities of issues, to ensure inclusion and to shift traditional power relations (see Section 3.1).

INTERSECTING ISSUES INTERSECT WITH EACH OTHER

It is also important to remember that intersecting issues can, and often do intersect with each other. For example:

Climate change affects women disproportionately negatively; and climate change also have significant mental health impacts, particularly when climate-related disasters occur.

Social justice cuts through all sectors, and when equity and access is considered in any sector, and when the root causes of inequality are considered, the potential for changing systemic inequality is opened up (see Section 2.3).



RESOURCES

Intersectionality and inclusion

- **The case for philanthropy to step up with an intersectional approach.** This article by Deepa Pawar and Ami Misra advocates for intersectional approaches to improve solutions for vulnerable groups, including women. Read it [here](#).
- In the Standard Social Innovation Review, **Trent Stamp and Cathy Choi write about Philanthropy's Problem with Single-Issue Solutions.** They discuss why more funders need to address multiple issues simultaneously and what the only US foundation currently funding intergenerational programs has learned from the approach. Read it [here](#).
- This article by **Sofia Arroyo, Executive Director of EDGE Funders Alliance**, emphasises the importance for funders to move away from single-issue approaches and to understand the deep interconnected nature of all the crises the world is facing, and to apply a systemic lens that focuses on justice, equality and well-being for all humans and nature from the ground up. Read it [here](#).
- **Philanthropy and Gender Equality. Domestic Philanthropy for Development and Gender Equality in South Africa.** This OECD report analyses domestic philanthropic giving for development and gender equality in South Africa. It provides solid baseline information against which to monitor the evolution of the domestic philanthropic flows in the aftermath of the Covid-19 pandemic. The OECD Centre on Philanthropy carried out the study in collaboration with IPASA and aims at shedding light on domestic philanthropy's contribution to development. Read it [here](#).
- **Conference Report Adaptability & Sustainability: Building Towards a Resilient and Sustainable Social Justice Sector.** The Ford Foundation's report on their 2021 Annual Partner Convening demonstrates how the foundation supports organisations to deal with challenges such as the impact of Covid-19 on the

social justice sector and civil society in Southern Africa, and the effects of climate change and gender-based violence. The report features key themes discussed during the convening, as well as technical talks aimed at building organisational resilience and capacity. Read it [here](#).

Climate

- **To increase their impact, the Early-Childhood and Climate Movements need to join forces.** This article by Joe Waters and Elliot Haspel says that philanthropy can lead in removing the barriers that separate funding for early childhood and climate change work. Read it [here](#).
- In the article **The Climate Education Crisis**, Yasmine Sherif writes, "world leaders must acknowledge the deepening links between the climate crisis and education. Over the next 30 years, more than 140 million people are expected to be displaced by climate change across South Asia, Sub-Saharan Africa, and Latin America, at the cost of some \$7.9 trillion." Read the full article in the [here. Syndicate](#).
- **The climate crisis presents an opportunity for a more inclusive economy.** Xhanti Payi proposes that we should find opportunities in our everyday lives that will enable us to create a more inclusive world, and a hopeful future of work. Read it [here](#).
- **Climate change resilience: can philanthropy play a role?** written by CAPSI doctoral candidate, Keratilo Mogotsi, considers the role of philanthropy and indigenous knowledge in relation to climate change, noting that the way in which Indigenous people have dealt with natural disasters in the past, has not been well documented. Read it [here](#).
- **Unlocking philanthropy's potential What funders can do to build strong philanthropy support ecosystems.** This Alliance Magazine Blog by Fred Nelson and John Kamanga discusses increased financial commitments to support biodiversity, protected areas, ecosystem restoration, and related conservation efforts. It recognises the role of Indigenous Peoples and Local Communities (IPLCs) in protecting and restoring ecosystems. Read it [here](#).
- **Philanthropy must engage with the 'Action for Climate Empowerment' agenda.** In this article Alice Amorim and Amiera Sawas say that philanthropy, given its unique characteristics, can play an important role in supporting the Action for Climate Empowerment (ACE) agenda. Read it [here](#).
- The urgency and importance of philanthropic responses to the climate crisis is highlighted in the **August issue of WINGS News**. WINGS Executive Director, Benjamin Belleghy says *"If we don't act on climate now, how can we be sure that there'll be a tomorrow to act on our other causes?"* In his article, titled **'Philanthropy must act on 'code red for humanity'**, he outlines why philanthropy actors must take action on the climate emergency. Read it [here](#).

Gender

- **Philanthropy for Development and Gender Equality in South Africa.** The launch of this OECD Centre on Philanthropy report focused on domestic philanthropic flows in South Africa and panellists discussed the remaining challenges for gender equality, the impacts of recent legal reforms on the scope and nature of activities, and how to encourage efficient collaboration. Read the report [here](#), explore and download the data on the open-access dashboard [here](#) and access the recording of the report launch [here](#).
- **A Conceptual Model of Women and Girls' Empowerment.** This report by the Bill and Melinda Gates Foundation explains why it is necessary to shift the perspective that women and girls are beneficiaries of health and development programmes, to a view that they are agents of change. This report also shows why recognising that inequality, as experienced by women and girls, is important in understanding the root causes of poverty and inequality. Read it [here](#).
- **The crucial, growing role of women in philanthropy** points out that the role of women in philanthropy is growing, and that the diversity and collaborative approaches that are associated with this trend is making philanthropy more sustainable. It also impacts on increased funder for gender issues. Read it [here](#).

- **The Bridgespan Group. Lighting the Way: A Report for Philanthropy on the Power and Promise of Feminist Movements.** Shake the Table and The Bridgespan Group teamed up to understand how we can better connect global philanthropy with feminist movements. This report offers practical ideas for all philanthropists, including those whose core focus is not gender equality. Read it [here](#).

Mental health

- **South African Child Gauge 2021/2022. Children’s mental health: A catalyst for development.** According to this report, investing early to promote children’s optimal mental health and wellbeing is key to break the cycle of poverty, violence, and mental ill health, and unleash children’s potential. The report is published by UCT’s Children’s Institute in partnership with various stakeholders including the Standard Bank Tutuwa Community Foundation and The LEGO Foundation. Read it [here](#).
- **What’s the matter? Kids, Covid, and the cost of mental health.** This article highlights three key areas of focus for philanthropists. Read it [here](#).
- **Alliance Magazine** published a special edition on mental health philanthropy which explores the present state of philanthropy and mental health. It covers initiatives and gaps; intersections with other issues; and what is needed for better and more impactful responses from funders in this important but neglected area. Read it [here](#).

IPASA RESOURCES

Climate

IPASA has developed a comprehensive **Climate Crisis Toolkit and Resource Pack** to assist funders to integrate climate issues in their work. This toolkit includes a self-assessment that will assist funders to find a place to start or improve irrespective of where they are at on their climate journeys and includes a chapter on how climate intersects with six intersecting areas: Just and Democratic Societies; Public Health; Marginalised and Vulnerable Groups (Including Youth, Women and Children); Education; Nature Conservation; as well as Social and Economic Development. The toolkit is available [here](#).

IPASA’s climate initiative has been featured in articles in IPASA’s own newsletter and other philanthropy media.

- **Philanthropy support organisations have a key role to play in tackling climate change.** In this WINGS article, Louise Driver and Fia van Rensburg explains why philanthropy support organisations such as IPASA are perfectly positioned to play a pivotal role in educating and supporting funders to fund climate change and to incorporate climate change considerations in their funding strategies. Read it [here](#).
- In the WINGS article **Futureproofing Philanthropy against Climate Change – A Dynamic Conversation on Context-Specific Philanthropic Initiatives**, Louise Driver writes, “IPASA is aiming to facilitate a common understanding amongst South African philanthropic organisations regarding climate change and the climate crisis globally, regionally, and nationally, and why the involvement of philanthropic organisations in tackling this issue is imperative for a sustainable, green, and resilient future.” Read it [here](#).
- **The Lewis Foundation on climate action in South Africa.** Alliance magazine interviewed Lindy Rodwell van Hasselt from The Lewis Foundation, on philanthropy’s role in addressing climate change. Read it [here](#).
- **It’s time to confront the disconnect between the climate crisis and South African philanthropy Alan Wallis, Strategic Advisor, African Climate Foundation** says climate change is not recognised in the philanthropy sector as the cross-cutting impact amplifier that it is. He wants philanthropists to invest in SA’s long-term socio-economic and environmental resilience. Read it [here](#).

- **IPASA Members’ Climate Response: Progress, Challenges and Learnings.** IPASA is committed to continue supporting our members on their climate journeys. **JET Education Services, The Lewis Foundation and The Grindrod Family Centenary Trust** share their experiences of creating climate change awareness and action in their organisations. It is evident that it is a process, with no “one-size-fits-all” solution. Read it [here](#).
- IPASA has also published **case studies** on our members’ climate initiatives. Read it here. (Pending publication)

Mental health

- **Why philanthropic funders need to be aware of how mental health cuts across everything.** Deborah Diedericks, the EMpower Foundation’s Programme Officer for South Africa and Fia Van Rensburg, IPASA Knowledge Manager argue that including mental health considerations in programmes can improve impact. In a context where high levels of adverse events occur, funders must critically interrogate their assumptions and understand the reality of programme participants. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

Climate Change Baseline Assessment: IPASA has conducted a baseline assessment of members’ funding practices regarding climate responses, mitigation, and integration of climate issues into funders’ sector focus areas, as well as their investment practices. Read it [here](#).

3. GRANT-MAKING PHILOSOPHY AND PRACTICES

Worldwide, philanthropy is increasingly challenged to review traditional funding practices, the thought patterns that underpin it and the power dynamics embedded in the funding ecosystem, and specifically the power dynamic between funders and recipients of funding. In the discourse about the need for transformation in the funding sector, key tenets include:

- the #ShiftThePower movement
- participatory grant-making
- community-focused funding
- emphasis on diversity, equity, and inclusion (DEI)
- decolonialisation of philanthropy
- and equitable grant-making practices.

All these topics are complex, and they are not mutually exclusive. An additional layer of complexity is added by the need for contextualisation to the South African context. This toolkit cannot deal with these topics in depth, and while IPASA does not propose a specific course of action for its members, we would like to encourage our members to critically engage with these debates. Individual funders can ensure that their own funding practices are designed to achieve the best possible results within the context in which they operate, and that they simultaneously contribute to building a healthier funding ecosystem. A Good starting point for funders is to reflect on their own practices within the unique context of their own organisations, so that they can make context-sensitive adjustments to their funding focus areas their funding practices.

3.1 POWER RELATIONS IN GRANT-MAKING

Traditionally an unequal relationship exists between funders and those who are funded. Because recipients of funding depend on grant maker's contributions there is the possibility for funders to impose their agendas and ways of working on their grantees? The power relations between funders and recipients of funding are also informed by the notion that funders' financial contribution and their ways of doing things are more valuable and better than local ways of doing things, and the non-financial assets of local partners. One of the things funders have learned through the Covid-19 pandemic is that those who receive funding bring valuable assets to the table. This includes their extensive networks in communities, deep knowledge of community assets, and nuanced knowledge of community needs and possible solutions for problems.

Power relations in the funding sector also refers to the relationship between the [Global North and the Global South](#). While these terms are widely debated, for the purpose of this toolkit, suffice to say that these terms do not refer to the northern and the southern hemisphere, but rather refers to groupings of countries based on their economic, political, and social development status.

The #ShiftThePower movement originated as the conference hashtag for the [Community Philanthropy 2016 Global Summit on Community Philanthropy](#) in Johannesburg. The purpose of this gathering was firstly to elevate the role and status of community foundations, grassroots grant makers, women's funds environmental funds and other community development foundations within the context of the global philanthropy movement; and to engage in a conversation about moving away from the top-heavy and top-down systems that have become part of international development and philanthropy, and moving towards a flatter and more equitable framework of people-based development. The strategy was to start a conversation about power through the entry point of community philanthropy.

Since the start of the #ShiftThePower movement, interest has grown into a broader conversation about awareness of power relations and calls for shifting the power closer to organisations on the ground. #ShiftThePower calls for a change in thinking, behaviour, and ways of working. Covid-19 has elicited renewed interest in this conversation, and a key initiative in the philanthropy sector was the [2021 #ShiftThePower seminar](#) series of the Centre for Strategic Philanthropy at the University of Cambridge Judge Business School. This series built on the Centre's [2020 report of philanthropy and Covid-19](#), which found that the urgent needs created by the coronavirus pandemic showed the importance of moving away from over-reliance on philanthropy role players from the Global North.



RESOURCES

- **Shifting the power dynamics in global south philanthropy.** Clare Woodcraft – Executive Director Centre for Strategic Philanthropy, University of Cambridge Judge Business School explains why improved power dynamics between funders and grantees can drive impact and shares how they have expanded their links with African philanthropists. Read it [here](#).
- **Alliance webinar: #ShiftThePower: what power and how far has it shifted?** This webinar deliberated on what the #ShiftThePower movement is and what it has achieved. A panel of activists and

professionals working with small, grassroots organisations within local communities reflected on power relations within the sector and how supporting the growing field of community philanthropy can activate change. Read it [here](#).

- **Understanding the Global South: Key Philanthropic Trends, Challenges and Opportunities in Asia, Africa and Latin America.** This report from the Elevate Children Funders Group (ECFG) and the International Education Funders Group (IEFG) provides insights about philanthropy in Africa, Asia, and Latin America, and offers recommendations to enable philanthropists change and improve philanthropy in the Global South. Read it [here](#).
- **The series toolkit: shifting power in grant-making to improve child and youth outcomes.** This resource from the Elevate Children Funders Group highlights case studies, evidence, and experiences of diverse organizations and foundations who are making the shift themselves. Access the Toolkit [here](#).
- **A rebalancing act: How funders can address power dynamics.** New Philanthropy Capital discusses what is meant by rebalancing power in philanthropy; why it is important for funders to rebalance power and the harm of not doing so; and how to rebalance power through focusing on yourself, grantees and communities, and your goals. Read it [here](#).
- **Greater funding is key for African NGO impact.** This article by Jan Schwier, Siya Hayi-Charters, Maddie Holland, and Soa Andrian from The Bridgespan Group shows what can be done to change funding disparities for African NGOs. They provide practical suggestions for improvements that will strengthen civil society organisations in Africa. Read it [here](#).

IPASA RESOURCES

- **Community-led philanthropy, COVID-19, and why it's time to #ShiftThePower.** This presentation from Jenny Hodgson from the Global Fund for Community Foundations, at the 2021 IPASA Annual Symposium provides insights on why it is time to reimagine community philanthropy, to start thinking systems, and to work towards the vision of creating the civil society we want. Read it [here](#).

3.2 PARTICIPATORY GRANT-MAKING

Participatory grant-making can be an important strategy to adjust traditional power relations in grant-making, as it gives voice to funding recipients and communities that benefit from funding on various issues and decisions. It can take many forms; can involve different degrees of participation and involves change processes and required building relationships of trust.

At its core participatory grant-making builds on acknowledging and respecting that funding recipients and communities have valuable assets and insights they bring to the table, that they may have solutions for their problems, and that their knowledge, understanding, and resources are complementary to that of funders.

Participatory grant-making requires from funders to listen, and to be willing to adapt and learn from their engagement and relationship with role players on the ground. Implementing participatory approaches may also require funders and grant recipients alike to “unlearn” ways of thinking, interacting, and doing. In some instances, participatory grant-making may also require that funders invest in assist recipients of funding and communities to actively participate in the grant-making process and related decision-making.



RESOURCES

- **Interest in participatory grant-making leads to... where?** This article by members of the Participatory Grant-making (PGM) Community provides a basic DOs and DON'Ts roadmap for participatory grant-making. Read it [here](#).
- In **Understanding the Risks of Non-participation in Philanthropy**, Daniel Parks (in the Stanford Social Innovation Review) guides philanthropists on improved inclusion of beneficiaries in decision-making processes. A practical framework for assessing and understanding risks factors contributing to participation-related problems and opportunities are outlined [here](#).
- **Participatory Grant-making: A shared approach to effective change.** This podcast featuring Maria De La Cruz, Irene Wong, Mary Jovanovich, and Michael Voss explores the idea that those who are closest to problems are often the ones with the greatest insights into how to address them. Read it [here](#).
- **Grassroots Grant-making. Embedding Participatory Approaches in Funding.** A Winston Churchill Fellowship Report. An extensive yet practical guide to participatory grant-making. Read it [here](#).
- **Participatory grant-making: Has its time come?** The Ford Foundation explores how foundations can practice participatory grant-making and provides examples. Read it [here](#).
- **Deciding Together: Shifting Power and Resources Through Participatory Grant-making.** This publication looks at why and how funders are engaging in participatory grant-making and shifting decision-making power to the very communities impacted by funding decisions through examples and insights that illuminate benefits, challenges, and models of participatory grant-making. Read it [here](#).
- **Smarter Grant-making for Grantee Organizations: Conversations to Have with Funders.** This guide is aimed helping funders to strengthen grant-making practices and learning with their partners and to assist grant seekers to participate actively in grant-making processes. Read it [here](#).

3.3 COMMUNITY-FOCUSED AND COMMUNITY-LED PHILANTHROPY

As mentioned in the preceding section, participatory grant-making not only includes the involvement of grant recipients in decision-making, but also gives space for communities that benefit from funding to have a say in funding decisions and implementation of funded initiatives.

In addition to arguments regarding the value of including communities in funding decisions, the most compelling arguments for community-led philanthropy is that it increases the likelihood of achieving lasting and sustainable change, i.e., better outcomes for investments.



RESOURCES

- **Powered by the people: Community-driven change in urban informal settlements.** This Bridgespan report uses case studies from Africa and India to demonstrate how community-driven change can increase the likelihood of achieving lasting impact by illuminating mindsets and pathways towards enduring change. For an article on the report, see [here](#). The full report can be downloaded [here](#).
- **Global Fund for Community Foundations; Shifting Power Closer to the Larger Masses.** In this interview piece, we learn insights from the Global Fund for Community Foundations on how community philanthropy strengthens local capacities and is a strategy for sustainable development. Read it [here](#).
- **The Social Sector Needs a Meta Movement.** This article calls for the creation of a network of grassroots movements and calling out connections across issues, and for the social sector to create urgency and drive demand for solutions and policy change to create a better world. Read it [here](#).
- **Grant-making for Community-Driven Systems Change.** This Firelight information sheet shows how funders can reimagine and rebuild grant-making systems and processes to support community-driven systems change. Read it [here](#).
- **Community-driven systems change.** This Firelight resource explains what community-driven systems change and what it is not. It includes a comprehensive set of tools for funders who want to support community-driven systems change. Read it [here](#).
- **Greater funding is key for African NGO impact.** Jan Schwier, Siya Hayi-Charters, Maddie Holland, and Soa Andrian from The Bridgespan Group shows what can be done to change funding disparities for African NGOs. They provide practical suggestions for improvements that will strengthen civil society organisations in Africa. Read it [here](#).
- **Evidence, resources and practical tools and templates for supporting community-driven systems change.** Firelight's three-year process of inquiry, learning, co-creation, and validation with their community-based organizations (CBOs) grantees is captured in a report, Community-based Systems Change. Read it [here](#).
- **From promises to 10 radical actions.** Drawn from work with their partners Radical Flexibility proposes 10 radical actions to guide donors and local organizations in moving from promises of supporting locally led social change to action. Read it [here](#).
- **Language matters in philanthropy.** A guide with helpful tips for staff members or trustees of foundations to examine and strengthen language use when interacting with colleagues, grant partners and community members. Read it [here](#).
- **Deep listening for social change.** Deep listening is foundational to understanding stakeholder and community needs. In deep listening, how the listener enters and engages in a conversation is key. Read it [here](#).

IPASA RESOURCES

- **Community-led, Context-sensitive Development.** The Roger Federer Foundation shares experiences with community-led initiatives and how an approach of partnership creates an environment for robust engagement which gives latitude to local partners to adapt innovative concepts to meet their needs, while at the same time building accountability at ground level. Read it [here](#).

- **Community-led Philanthropy – a New Frontier or an Old Tale?** In this article, the Mott Foundation reflects on community led approaches in philanthropy. She highlights that some philanthropists have been using this approach all along and reflects on how community-led philanthropy can be enhanced to improve development outcomes in different types of communities. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA held a member-only Grant Craft Workshop on 8 June 2022, on **Community-Focused Funding**. This workshop formed part of IPASA’s ongoing deliberations on equitable grant-making practices and explored what community-focused philanthropy looks like in practice. In this workshop, IPASA members CivSource South Africa and CivFund; and ELMA Philanthropies shared information and learnings on how they respectively approach and implement community-focused philanthropy. They focused on the values that underpin community-focused approaches, and shared examples of their experiences: how implementation takes place, how this approach can shift power relations, what the challenges are with community-focused philanthropy, and what they have learned through their practices. Read more [here](#).

3.4 DIVERSITY, EQUITY, AND INCLUSION (DEI)

While the diversity, equity and inclusion (DEI) debate in the philanthropy sector has recently gained momentum in Global North, and particularly in the United States of America, funders in South Africa have unique contextual motivators for, and challenges related to DEI which relates to our country’s historical, structural and systemically embedded racial inequality, and the far-reaching consequences thereof on all aspects of society and development in the country.

When South Africans think of DEI, racial equality is likely to be what comes to mind first. Given the deep and devastating impact of apartheid on racial inequality, and that this inequality persists as a key characteristic of the development challenges in South Africa, coupled with the fact that South Africa is the [most unequal society in the world](#), the bulk of philanthropic investment in South Africa is directed at addressing inequality and inequity that originates from racial inequality and prevailing systemic impacts.

Some funders also focus on DEI related to disability, youth, and women and children and issues related to gender inequality, including women empowerment, Gender Based Violence and Femicide [gender equality](#), LGBTIQ+ issues and organisations, and sexual reproductive health rights. Some South African philanthropic funders integrate gender as a cross-cutting issue in their grant-making practices.

Funding aimed at enhancing DEI, links up with the promotion of the realisation of key human rights, which is important in the broader human development context. The importance of gender DEI, for example, is clear in the general development impact it has on other areas such as educational attainment and economic development.

DEI considerations not only relate to funding of issues, but it also requires consideration of the extent to which philanthropic funders have diversity in their governance and operational structures. Furthering the DEI agenda requires reflection, strategic thinking, and a purposeful change management plan.

Power and power relations have an impact on diversity, equity and inclusion. Power shapes organisations and determine priorities, networks and ways of doing things. The boards and trusts of philanthropic organisations are seats of power, and lack of diversity at the centre of philanthropic organisations filters through to what is regarded as important and how critical issues related to socio-economic justice are viewed.



RESOURCES

- The **Diversity, Inclusion and Effective Philanthropy** guide by the Rockefeller Philanthropy Advisors aims to explain how diversity and inclusion can be used as practical considerations for getting better results. Read it [here](#).
- **Supporting Diversity, Equity, and Inclusion Efforts for Nonprofits.** Melissa Sines lays out steps for funders to take to support diversity, equity, and inclusion in non-profits. Read it [here](#).
- **Three Ways to Improve Diversity, Equity, and Inclusion in Philanthropy.** Brittany Boettcher & Kathleen Kelly Janus write that if funders want to improve DEI in their organizations, they need to re-define risk, emphasize trust, and reflect the communities they serve. Read it [here](#).
- **Hollie Russon Gilman and Mark Schmitt** contends that investment to build substantive, resourced, and long-term public decision-making power can contribute to a more equitable, inclusive, multiracial, and multi-ethnic democracy, against the backdrop of declining trust between public and government. Read it [here](#).
- **Diversity in Philanthropy: A Comprehensive Bibliography of Resources Related to Diversity Within the Philanthropic and Nonprofit Sectors.** The Foundation Center's bibliography on diversity in philanthropy documents the growing concern about diversity within the philanthropic and non-profit sectors. Entries cover the traditions of giving among different racial groups as well as the practices of foundations and non-profits, theoretical issues and practical how-to guides. Read it [here](#).

IPASA RESOURCES

- **Taking anti-racism in education personally.** Helen Malgas and Halli Manolacos-Tsehis from Students For A Better Future, write about promoting transformation and social justice in education. Read it [here](#).

3.5 DECOLONISATION OF PHILANTHROPY

One of the themes emerging in calls for transformation in philanthropy is that philanthropy has to be decolonised. The colonisation narrative is also coming up in climate philanthropy, where proponents of the decolonisation agenda caution that the colonisation of climate philanthropy needs to be avoided. Other themes in the decolonisation debate include questions about what exactly is meant by decolonisation, who and what should be decolonised, and who should be doing this and how.

Interestingly, domestic funders are also reminded that they need to look at how they have engaged with, and absorbed funding approaches and practices that have originated, and have been promoted by Global North funders. This means that there may be a need for local funders to engage with the decolonisation debate to reflect on what their practices are; where these practices originate from; and whether these practices are in service of what domestic funders want to achieve. Reflection these issues will be useful to determine what could be changed to ensure that domestic funding reflects local values and practices better.



RESOURCES

- The September issue of Alliance Magazine includes a special feature on **Decolonising Philanthropy** and asks critical questions regarding the globalisation of philanthropy and the discourse on decolonising philanthropy. [Read it here.](#) The recording of a webinar on the same topic is available [here.](#)
- **Three Paths to Decolonizing Philanthropy.** Geoffrey Thige and Jailan Adly share three ways that funders can decolonize philanthropy effectively and equitably to drive community-led solutions to the forefront. Read it [here.](#)
- **Why decolonizing philanthropy is important now more than ever and how to achieve it.** M. Scott Frank, Executive director of The Roots Initiative highlights some of the key elements needed for a creating the right environment to decolonize philanthropic initiatives. Read it [here.](#)
- Exploring the intersections of race, culture and philanthropy, author of **No Win Race**, Derek A Bardowell speaks to the people who are tackling some of the most challenging social issues of our times. In each episode you will hear the views, approaches and tactics of those who are reforming our public services, speaking truth to power and opening the doors for the marginalised to move to the centre. Listen to this episode on Decolonising Philanthropy [here.](#)
- In **Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance**, Edgar Villanueva, from the Schott Foundation for Public Education, asserts that colonialism is not a thing of the past, but lives on, like a virus, in existing systems and structures, including philanthropy and social finance. Read it [here.](#)
- Philanthropy New York, held virtual meeting to explore the question: **What's the Role for International Grantmakers in Decolonizing Philanthropy?** This event aimed to explore what is meant when we talk about decolonizing philanthropy, how to use a decolonization frame around anti-racism, climate justice, and ways funders have started adopting practices that decolonize their grant-making, rooted in racial equity. Watch it [here.](#)

3.6 EQUITABLE GRANT-MAKING PRACTICES

There is growing awareness that fundamental shifts are required regarding the way in which funders of development programmes approach their work and operationalise their plans. Key issues in the discourse on funding practices include the way in which funders see and engage with those organisations that receive funding and support from them, and the communities that benefit from funding. Equitable grant-making practices relate to all aspects of the funding cycle, including what is funded, who is funded, and how funding works, both in terms of application for funding and management of and reporting on funding received.

Calls for increased funder transparency and accountability is another central theme in the conversation on equitable grant-making processes, given that in independent private philanthropy information may not always be disclosed on what is funded, who is funded, and the quantum of funding.

Traditionally many funders have imposed burdensome application, compliance monitoring and reporting requirements on funding recipients. This stems from the unbalanced power relationships and accompanying power dynamics in the sector.

The requirements that funders have traditionally imposed on potential, prospective and actual recipients of funding also relate to how funders view recipients of their funding. In many instances potential and prospective recipients of funding have to prove that they are worthy of the attention of funders and of the resources that they have to allocate.

The perspective that funding recipients may be worthy partners - who bring valuable assets in the form of local networks, deep context-specific knowledge, and the ability to offer and contribute to the solutions that are required to solve development challenges to the table - has been underplayed in some instances. The current trend is to start looking at funding recipients as valued implementing partners, instead of regarding them as “grantees”.

Equitable funding practices further relates to trust-based and community-centered funding practices, which proposes that funders should align their giving to what communities need and know, instead of unilaterally deciding on funding priorities.

RESOURCES

- **How to Fund Radically This Year: Moving Promises into Action.** This article by Riva Kantowitz, and Lauren Bradford from the Radical Flexibility Fund, published by the Judge Business School’s Centre for Strategic Philanthropy explains how funders and social change leaders can implement effective alternatives to the current system of funding. Read it [here](#).
- An **Equitable Grant-making Assessment** has been developed by [Rooted in Vibrant Communities \(RVC\) Seattle](#) and [NonprofitAF](#). This assessment provides a tool for funders to determine where their grant-making practices fall on the Equitable Grant-making Continuum. See the Equitable Grant-making Assessment [here](#) and the Equitable Grant-making Continuum [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA adapted the Equitable Grant-making Assessment for the South African context. Local funders can use this tool to assess where they are at in terms of equitable funding practices. By completing the assessment, funders can determine to what extent they are implementing equitable funding practices. The adapted Equitable Grant-making Assessment Tool is available [here](#).

GRANT-MAKING AND GRANT MANAGEMENT

4. FUNDING INSTRUMENTS AND APPROACHES

Grants remain the most popular funding instrument for many funders in South Africa. Research undertaken by IPASA amongst funders in the Early Childhood Development (ECD) sector (2021 and 2022); and the After-school Programme (ASP) sector (2022), have confirmed that grant funding is the preferred funding instrument for most funders. Many funders are providing both restricted and unrestricted funding, and some are interested in becoming more knowledgeable on innovative funding mechanisms.

Key insights from IPASA's research:

- **ECD Funders Survey:** *Ninety-one percent of all ECD funders who participated in the ECD funders survey use grants as their primary funding mechanism, and 78% of this group use only grants. Some ECD funders also use funding instruments such as loans (14%), equity funding (14%), impact bonds (11%), convertible debt/grants (9%), and guarantees (6%). Forty percent of funders indicated that they provide unrestricted funding, 46% indicated that they fund non-programmatic costs; and 66% said that they fund ongoing core costs.*
- **ASP Funders Survey:** *ASP funders fund mostly via grants but are interested in learning more about innovative funding mechanisms and funding innovation. Thirty-two percent of ECD funders that participated in the ASP funders survey provided restricted funding only; 27% provided unrestricted funding only; and 41% provided both restricted and unrestricted funding.*

Selected issues related to funding instruments and approaches are discussed briefly in the section below: the funding starvation cycle; core funding; and innovative funding mechanisms.

4.1 THE FUNDING STARVATION CYCLE, CORE FUNDING AND GENERAL SUPPORT

When considering funding instruments and approaches it is important to consider *what* instruments are used, and *how* they are used, and what the impact of decisions regarding funding instruments and their application are. For example, in recent years, the concept of the funding “starvation cycle” has surfaced, referring to the chronic underfunding of grant recipients, as a result of project grants, which also represent more than 75% of giving by foundations in the USA.

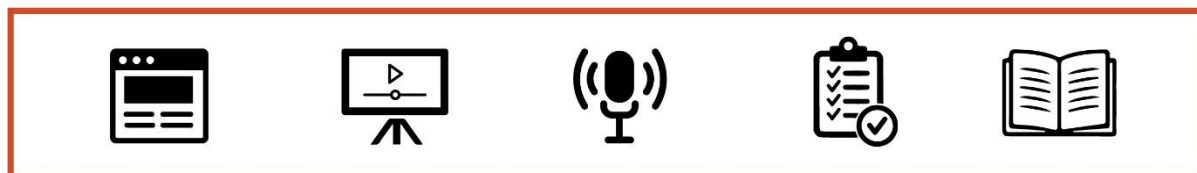
Learnings regarding philanthropy grant funding include that project grants are an important tool in philanthropy, it does not bear in mind the core administrative and operational costs of delivering the programmes and services that are funded by these grants.

Core funding and general organisational support which can take many forms, are key to break the funding “starvation cycle”. Definitions of core funding, general (operational) support, and unrestricted funding differ from funder to funder, but the common underpinning principle is that this type of funding is provided with limited conditions attached to what it should be spent on specifically, and funding recipients have the discretion to apply the funding where it will best be used to implement planned programmes and outcomes at any given time. Because this type of funding is not restricted to specific activities and is not attached to budget lines, it provides more flexibility and enables funding recipients to respond to changing conditions, new needs, unforeseen developments, and crisis situations better.

This type of funding may also be given over periods for longer than one year, which provides further flexibility and contributes to sustainability. As the terminology implies – core funding; general support; unrestricted funding – this type of funding can be applied to other expenses than those related directly to project or

programme implementation, which means that it could be used for organisational capacity building and strengthening as well, thereby contributing to resilience and sustainability of implementing partners.

Funders who provide this type of funding trusts recipients of funding to apply funding where it matters most, and this shifts the power of decision-making to implementing partners, who often knows the (sometimes rapidly changing) needs and conditions on the ground better than the funder.



RESOURCES

- **Five Foundations Address the “Starvation Cycle”.** This article by Jeri Eckhart-Queenan, Julia Silverman, Michael Etzel describes the Menu of Grant-Making Approaches, and guiding principles for flexible funding that has been developed by Bridgespan. Read it [here](#).
- **Breaking the Starvation Cycle.** This report, published by Funders for Real Cost, Real Change, provides recommendations to funders on how to build NPO resilience and sustainability. Read it [here](#).
- **Strengthening Grantees: Foundation and Nonprofit Perspectives.** The Center for Effective Philanthropy (CEP) conducted a comprehensive study drawing from both foundation and non-profit leaders’ perspectives to examine what support foundations are providing to grantees to strengthen their organizations. Read it [here](#). CEP has also released a guide called **Making it Happen: A Conversation Guide**. A resource for foundations seeking to start providing, or provide more, multi-year general operating support grants. Read it [here..](#)
- **Investing in the Strength of People and Organizations in Times of Crisis.** Maria Tourtchaninova from the David & Lucile Packard Foundation discuss the importance of investing in the strength of people and organisations in times of crisis. Strengthening leadership capacity and the ability of organisations to adapt to a quickly changing world is regarded as essential. The article also describes how continuous adaptation, feedback loops and participant reflection sessions can be used to inform ongoing programme modifications. Read it [here](#).
- **Small Steps in the Right Direction: Making General Operating Support the Norm** featured by The Centre for Effective Philanthropy, Liliane Loya reflects on feedback received from role players working on both sides of the grant-making equation, on her blog posts on the gap between foundations’ narratives about making general operating support accessible to grantees, and their actual practices. Read the full article [here](#) and see INNO blog posts that informs this article [here](#).
- The Cambridge Judges Business School’s **“#ShiftThePower” series** covers various issues regarding shifting power dynamics in philanthropy, including core costs and flexible funding.
 - See the *“Shifting the Power Balance to the Global South”* webinar video [here](#).
 - See the *“Beyond Grants: Driving System Change Across the Ecosystem”* video [here](#).
 - See the *“Make it Flexible: Building Resilience”* video [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA hosted a **Grant Craft Workshop on Core Funding** in 2021, which focused on the different ways in which core funding can be interpreted and implemented. The Charlize Theron Africa Outreach Project shared information on how they approach core funding, the Roger Federer Foundation shared their experiences

regarding building sustainable partnerships, and The Learning Trust discussed their comprehensive funding model. Read more [here](#).

4.2 INNOVATIVE FUNDING APPROACHES

Many funders use grants as their primary funding instrument, and the duration of grants vary between one year and longer periods of time, up to ten years, with some requirements for renewal or further funding built into the grant conditions. Grants are provided to funding recipients based on planned projects and programmes; the funding is paid either up front or partially up front or in tranches; it is based on inputs and activities; and funding recipients are expected to report on implementation and to be accountable for expenditure related to the activities or programmes implemented.

Innovative funding approaches include funding mechanisms that funds results achieved instead of planned results, as well as funding mechanisms that combines philanthropic and financial tools to maximise the impact of funding. Innovative funding approaches combines philanthropic funding and private and public sector investment, and this provides the opportunity to take projects and programmes to scale. Examples of innovative funding mechanisms include, but are not limited to blended finance, funding platforms, pooled funds and outcomes-based funding, where funding is provided for achievement of outcomes.

A wide range of innovative funding mechanisms exist which vary in terms of complexity. , It is important to understand what innovative funding mechanisms are applicable under certain conditions. Limited knowledge about these funding mechanisms and how they could best be used could prevent funders from experimenting with these approaches, but the potential of these approaches to unlock a virtuous cycle of development and to take initiatives to scale is a major advantage that should not be overlooked.



RESOURCES

- **Social impact bonds: Are we reaching an inflection point?** This article from Dipalesa Mpye, Social Investment Specialist at Tshikululu Social Investments reflects on Social Impact Bonds and their effectiveness as a mechanism for driving social impact while achieving financial returns for those that invest in them. Read it [here](#).
- **The Impact Bond Innovation Fund report.** This Intellidex report details the social and financial performance of the ECD Social Impact Bond that delivered high-quality home-based early learning services to preschool-aged children in low-income communities in the Western Cape, while delivering competitive returns to investors. Read it [here](#). See the video of the report launch [here](#).
- Various articles and reports on **Social Impact Bonds** and how this funding mechanism has been used in South Africa have been published by Intellidex. Read it [here](#).
- **Pooled Funds: What You Need to Know.** This GivingCompass article by Jordana Belke and Lydia Guterman explains how pooled funds can help donors amplify their impact by giving as a group. Read it [here](#).

- **About the Dignity and Justice Fund.** This blog explains how the Ford Foundation’s Dignity and Justice Fund works as a pooled grant-making fund designed to make high-impact grants to advance social justice and equity globally. The Ford Foundation contributes in-kind staff support to the fund which is designed to make grants efficiently to non-profit partners with minimal administrative burden. Read it [here](#).
- **Releasing the Potential of Philanthropic Collaborations.** This Bridgespan article shows how philanthropic partnerships are increasing and states that having a clearer path to investing in collaborative funds can achieve better impact. Read it [here](#).
- **What are the impact funds in South Africa currently?** This blog by Innovation Edge provides insight in impact investing and key impact investors in South Africa. Read it [here](#).
- **Innovative finance models: the new face of philanthropy.** This Alliance Magazine article by Danielle Todesco describes how innovative and risk funding, including Development Impact Bonds, Social Impact Guarantees, and Interest-free Recyclable Grants can be used to address complex problems in under-served communities. Read it [here](#).
- **Innovative Finance in Africa Review.** This report from the Bertha Centre for Social Innovation and Entrepreneurship at the UCT Graduate School of Business showcases the models and practices that form part of the innovative finance ecosystem across Africa. Read it [here](#).

IPASA RESOURCES

- **Funding innovations – unlocking a virtuous cycle of development** by Jana van Deventer of Intellidex explains how innovative funding approaches can be used productively and under what conditions certain approaches are relevant. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA, Intellidex and the foundationsXchange jointly hosted a session on the potential and limitations of innovative funding for foundations in August 2002, where examples of alternative and innovative funding were presented and discussed:

- Funding Innovations for Foundations: Jana van Deventer, Senior Impact Investing Researcher, Intellidex and Co-Chair of the Foundations Working Group of Impact Investing South Africa. Read it [here](#).
- Case study - The SAB Foundation and its new impact fund: Bridgit Evans, Executive Director of the Foundation. The Social Innovation Fund and Accelerator offers entrepreneurs the skills, knowledge, documentation, and funding required for success, and positions them for future rounds of funding from other investors. Read more about how the fund works [here](#).
- Case study - The Standard Bank Tutuwa Community Foundation: Zanele Twala, CEO of the Foundation. Read it [here](#).

5. MANAGEMENT OF THE FUNDING CYCLE

Funding approaches and the values and principles that underpin them determine how funders engage throughout the funding cycle, from solicitation of funding, implementation, and evaluation of results. Another key factor that informs how funders select the projects and programmes they fund, and how they manage the funding relationship, is the internal organisational capacity of funders. Funders in the philanthropy sector may be overwhelmed by the challenge of matching their (sometimes limited) resources to the vast and growing needs for funding. It is also important for funders to manage the funding relationship in an efficient and effective way.

The section below does not cover all aspects of the funding cycle but focuses on some key aspects: how funders select the projects and programmes they fund; different ways of approaching due diligence process; capacity development and institutional support; making the most of site visits; using software and programmes to track and manage funding; and planning and executing exits.

5.1 OUTREACH, PARTNERSHIP DEVELOPMENT, AND ACCESS TO FUNDING

Different funders have different approaches to finding the organisations they would like to fund and partner with. Some funders use only one approach and others use a combination of strategies to attract proposals from prospective grant recipients and implementing partners:

- **Unsolicited proposals:** Some funders are open to receiving requests for funding from any potential grant recipients at any time. Other funders only receive unsolicited proposals at certain times of the year or within their funding cycles, and other funders will not consider any unsolicited proposals. Some funders who accept unsolicited calls for proposals are open to considering a wide range of projects in terms of themes and focus area and the size of the proposed intervention, while others have narrower thematic focus areas for unsolicited proposals or would only consider requests for innovative projects. Some funders may also provide relatively small and short-term grants for unsolicited and or innovative projects that are initiated by prospective grantees.
- **Calls for proposals:** Funders may publish calls for proposals related to specific focus areas, programmes or strategic priorities, and such calls for proposals may either be “open” - i.e., they will consider relevant proposals at any given time; or there may be a specific time window for proposals.
- **Partnership approach:** Funders may follow an approach where they prefer to scan the environment for suitable implementing partners, explore possibilities through discussions and relationships building with potential partners. This process could take time and entails the development and deepening of relationships with potential partners over several months, which could lead to an invitation to the potential grant recipient to submit a proposal, or even to co-creating a proposal for a project or programme with the potential grant recipient.

Some funders have prescribed formats for applications, and these applications could be on templates – and templates can be in electronic format, in downloadable templates; funders may provide broad guidelines for funding proposals; they may accept proposals in the applicant’s format of choice; or they may accept applications that were prepared for other funders.

Funders may provide grants for periods of one year, or for more than one year up to longer periods, e.g., for three or five years, or even for periods of seven to 10 years. Grant renewal and re-granting processes vary considerably: some funders require annual re-applications which are reviewed through rigorous evidence-based approaches; other may conduct lighter reviews; and some may have automatic renewals over a given period, provided that funding recipients have complied to the terms and conditions of the initial grant.

Some funders have a diversified system in place, where new grantees may receive smaller grants, need to require to more stringent conditions and monitoring and renewal application requirements than those funding recipients with whom they have built up a relationship over time.



RESOURCES

- **Truly Shifting Philanthropy's Power Dynamics Requires New Structures for Giving.** This article by Donna Daniels and Kelley Buhles reflects on how philanthropy tends to work and proposes different ways of approaching grant-making. Read it [here](#).
- **Subtle ways power dynamics manifest between non-profits and funders.** This NonProfit AF blog points out the power dynamics in the grant-making process that funders could reflect on and change. Read it [here](#).
- **Rethinking Equity: The Changing Role of Funders in Philanthropy.** This article by Rachel Pall calls on funders to review their funding practices to identify ways in which equitable access to funding can be improved so that funding can reach those who need it most. Read it [here](#).
- **The 2022 High Impact Giving Guide** focuses on how funders can ensure a more just recovery from COVID-19. It focuses on issues critical for funders to address to ensure a just recovery; best practices for giving during COVID-19 and other crises/disasters; a sneak peek at Choosing Change, a toolkit for addressing structural inequality; and tips for avoiding fraud and practicing high impact philanthropy. Read it [here](#).

IPASA RESOURCES

- **Heart-led Philanthropy – Improving Financial and Social Return on Investment.** In this article, Gary Shearer, Executive Director of The Saville Trust reflects on how to bring deep connection and deep impact into philanthropy. He shares how their journey with deep connection has facilitated the development of initiatives in South Africa that are relevant for the broader development sector, and how commitment to deep connection has improved their social and financial returns. Read it [here](#).

5.2 DUE DILIGENCE

The importance of due diligence is an essential component of the decision-making process when grants are awarded, and when implementing partners are selected. Funders use due diligence processes to learn more about a potential grant recipient's organisational status and involves assessment of various organisational aspects such as strategy, as well as operational and financial processes and procedures.

The due diligence process is part of responsible and efficient grant-making and allows funders to select grant recipients that will ensure that funders receive long term value for their investment. Risk management is an integral aspect of due diligence processes, aimed at identifying potential weaknesses in grant recipient organisations upfront. When weaknesses are identified, grantmakers can decline applications or choose to support grant applicants to build capacity in their organisations.

Through thorough due diligence processes, transparency is enhanced, and a basis is laid for accountability. The way in which funders conduct due diligence processes vary considerably. At the one end of the spectrum due diligence can be a quick tick-box exercise, it could be a thorough assessment of a grant recipient that requires substantial input from potential grant recipients, or it could consist of a process of relationship building where funders and implementing partners get to know and understand each other better.

The focus of due diligence processes is often on responsible grant-making from the perspective of the funder, which involves a process where potential grant recipients must prove to funders that they are trustworthy and responsible and are suitable implementing partners for the funder. More recently there is increased pressure on funders to engage in equitable grant-making processes, where less burden is placed on potential grant recipients.

Another perspective which forms part of equitable grant-making and shifting the power is that grant recipients are becoming aware that they also have to assess whether a funder is suitable for them, and if funders can support them in the way they need to be supported. This shifts the focus from a perspective where grant recipients must comply with funder requirements, to one where both the funder and the potential grant recipient engage in a process of finding out if they are a “match” in terms of approach and purpose. When this approach is followed, the due diligence processes shift from an initial position of a lack of trust to a process where trust is built through the development of a relationship, characterised by common purpose.



RESOURCES

- **The Due Diligence Tool** is the product of a collaborative effort and the contributions and thinking of grantmakers from a diverse set of foundations. The purpose of this guide is to provide a research-based tool for the foundation program officer, whether specialist or generalist, and a methodology for and orientation to thinking about due diligence. Read it [here](#)
- **Due Diligence Done Well: A Guide for Grantmakers**, includes some of the same information as the original tool, but the material has been updated to reflect new learning about effective due diligence. Read it [here](#).
- **Due Diligence: What Grantees Need to Know**. In this article Martha Lackritz-Peltier aims to define due diligence and highlight why it's necessary, when it's needed and how to prepare for a due diligence exercise. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

In | 2022 IPASA hosted a Grant Craft Workshop on Due Diligence, where selected IPASA members discussed their approaches to due diligence. The Zenex Foundation showed how due diligence can be linked with an organisation's transformation agenda; ELMA Philanthropies gave insight into rigorous due diligence processes that build relationships right from the start; and the Maitri Trust reflected on why funders need to be conscious of the power relations that underpin due diligence processes, and the related assumptions that inform due diligence processes. The common thread in these presentations was that tick-box due diligence processes have little value, and that due diligence processes not only form an integral part of the relationship between funders and implementing partners / grantees, but also sets the tone for engagement throughout the funding period. Read more [here](#).

As part of their due diligence process, the Maitri Trust uses an [organisational self-assessment tool](#) which have been shared with IPASA members.

5.3 CAPACITY DEVELOPMENT AND INSTITUTIONAL SUPPORT

As discussed under the “starvation cycle”, implementing organisations need long-term support and need to be supported to build the capacity of their people and organisations to enhance the sustainability of organisations.

Funders have different approaches to capacity development and institutional support, and while some do not provide this, many funders provide some level of capacity development and institutional support, ranging from “light” support to intensive capacity development and institutional support. Often, this type of support will be based on gaps identified in due diligence assessments. Some funders have specific assessment tools that are used to determine capacity development and organisational support needs. When such assessment tools are used at the start of a funding relationship, they can also be used to track progress over time.

The benefits of an approach that integrate capacity development and institutional support extend beyond the immediate benefits of the support provided – it engenders openness and increases the level of transparency between funders and recipients of funding. This in turn strengthens partnership relationships that improves the fabric of the social sector and enhances the sustainability of the sector.



RESOURCES

- **Five Elements for Success in Capacity Building.** Carla Taylor and Lori Bartczak share five elements that should be part of any capacity building effort. Read it [here](#).
- **More than Grants: How Funders can Support Grantee Effectiveness.** This report looks at how trusts and foundations can give more than grants to support their grantees and the causes that they care about. This report focuses on the organisational development support provided by funders from around the world—exploring the types of support given, the evidence for whether it works, and how funders can approach impact measurement. Read it [here](#).
- This report, **Capacity Building Across Borders: A Strategy for Funders and Partners**, seeks to shed light on the needs and opportunities for capacity building in the global development non-profit space, as well as share emerging best practices and strategies to meet them. Read it [here](#).
- The **Supporting Grantee Capacity: Strengthening Effectiveness Together** guide, looks at how funders approach building capacity with grantees. Through examples from foundations ranging in size, mission, and geography, it explores various strategies for capacity building and the types of awareness that funders can choose to incorporate in decision making to facilitate informed, thoughtful judgments about strengthening organizations. Read it [here](#).
- **Strengthening Non-profit capacity core concepts in Capacity Building.** The Grantmakers for Effective Organisations’ guide offers a background on what capacity building is, what approaches are working for grantmakers and their grantees, and how to tailor an approach that best suits the needs of non-profits and communities. Read it [here](#).
- The **Effective Capacity Building in Nonprofit Organizations** report by the McKinsey & Company for the Venture Philanthropy Partners, sets to develop a definition of non-profit organizational “capacity” as well as an easy-to-use tool for assessing capacity. It also provides valuable lessons from organizations that have engaged in successful capacity building. Read it [here](#).
- The TCC paper brief titled, **Capacity Building 3.0. Paper How to Strengthen the Social Ecosystem**, covers fundamental concepts, terms, and definitions of capacity and capacity building. It also examines who needs

to build capacity and how that understanding has evolved over time and assesses how capacity in capacity-building has evolved. It also highlights the emergence of new methods for accomplishing capacity building and details the new innovations and techniques that are being used by those doing effective capacity building. Read it [here](#).

- **Capacity Building – what it takes from funders.** In this article, Barbara Kibbe explores funders’ role in building non-profit organisational capacity and how they can make sure that the support they offer is effective. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

The 4th workshop in the IPASA Grant Craft Workshop series focused on capacity development and institutional strengthening. During this workshop IPASA members learned about how the Ford Foundation’s BUILD programme works, what learnings emanated from the evaluation of this programme, and how the Ford Foundation is taking this programme forward. Read more [here](#).

IPASA workshops that focused on [due diligence](#), [core funding](#) and [community-focused funding](#) also covered aspects of institutional strengthening.

5.4 MAKING THE MOST OF SITE VISITS

The way in which funders approach site visits vary according to the general approach followed by funders, which filters through to their relationships with grant recipients. Site visits that extend beyond monitoring, can be extremely useful in providing funders with a better understanding of conditions on the ground, and the challenges that are experienced in a specific context. It can also go a long way to building relationships with implementing partners. Some funders also make use of site visits to deliver capacity development and institutional support.

Site visits also provide opportunities for collaboration for funders who co-fund programmes, or who fund different aspects of a programme at a specific site, or who fund complementary projects and programmes in the same geographical space. Combined site visits can save costs, contribute to a better understanding of the complexities and interrelationships of programmes, and the context in which they are implemented.

The different levels of collaboration identified in [Learning and Working Together: A Framework for Donor Collaboration](#) could also be applied to site visits, and in this way, different forms of collaboration other than co-funding could be explored.



RESOURCES

- In the **Quick Guide to Conducting a Non-profit Site Visit**, Bridgespan offers some tips on how to make the most of your time and the organization’s time when conducting a site visit. Read it [here](#).
- **What Funders Get Wrong About Site Visits.** In this article by Philanthropy Without Borders, funders are advised on what to avoid during site visits. Read it [here](#).

5.5 GRANT MANAGEMENT PROGRAMMES AND SOFTWARE

Philanthropic funders are a heterogeneous group in terms of size, focus areas, approaches to funding, geographical origin and where they provide funding. Philanthropic funders include small, local family foundations and large international funders. It is therefore no surprise that the way in which funders manage and monitor grant-making and grant implementation processes vary considerably. Some may not use grant management programmes and software at all, while others may have bespoke programmes tailored to their needs, and others may subscribe to commercial off-the shelf or customisable grant management software programmes.

Choices of grant management programmes and software depends on needs, funding available, and funders' organisational capacity to manage the software. As with many other aspects of grant-making, "one-size-fits-all" is not applicable, and what works for one funder may not work for another. Various options are available in the market, and careful selection of the most appropriate solutions are important.

It is, however, important for funders to be aware of how the use of technology can build efficiencies into their processes. When deciding on technology for grant management processes, funders also must remember that when technology is used, it should be aware that technology should not be used in such a way that it excludes anyone.



RESOURCES¹

- **A Consumer's Guide to Grants Management Software** Choosing a Grant Management Software to Support Trust-Based Philanthropy. This article by Submittable discusses recent developments in philanthropy and how software can relate to that. Read it [here](#).
- **The Next Generation of Grants Management Software. A buyers' guide for the new era of philanthropy.** This guide explores the relationships with grant management software and trust-based grant-making; streamlined grant-making; and equitable grant-making. Read it [here](#).
- **The Foundation's Guide to Grants Management Software.** Fluxx provides advice to foundations on grant management software. Tools available on this website include information on indicators that shows if a grants management solution is needed; how grant management systems can optimise grant-making; and the functions that grant management software should provide. Read it [here](#).
- **Grants Management Software Explained: What social impact pros need to know.** This article and video provide information on the value of grant management software. Read it [here](#).
- **A Consumer's Guide to Grants Management Software.** Philanthropy News digest published a series of articles and a guide about effective use of technology for non-profits. Read it [here](#).
- **Grant management software.** This website compares grant management software. Access it [here](#).
- **20 Top and free grant management software.** This website provides information on free grant management software. Access it [here](#).

¹Please note: IPASA does not promote or recommend any specific grant management software packages

- **Top paid grant management software.** This website provides advice and ratings of paid grant management software. Access it [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA held two workshops on grant programme management software, in 2021. IPASA members who shared their experiences with grant management programmes and software during these two workshops included the TK Foundation; the Zenex Foundation; the Harry Crossley Foundation; The Learning Trust; the Standard Bank Tututwa Community Foundation; the RAITH Foundation; Allan & Gill Gray Philanthropies, and the Hans Hoheisen Charitable Trust. Grant management tools and systems that were discussed in the two workshops include Decision.io; 123Formbuilder; Optimy; Salesforce; Fluxx; DevMan; and a bespoke M&E programme.

Read more about the first workshop [here](#) and find out more about the second workshop [here](#).

5.6 EXITS

Grants agreements have end dates, and therefore exits are an unavoidable part of the grant cycle. While grants can be renewed, and while some funders fund multiple grant cycles, at some point, there will be a grant exit. Grant agreements typically include grant exit clauses, and some funders regard discussing these clauses as sufficient preparation for grant exits.

Transparent and equitable grant-making practices require that dedicated attention is provided to joint planning for grant exits, to ensure that all parties involved are clear on exactly how the grant exit will be managed.

Another type of exit takes place when endowments have a limited time span, or when funders decide to spend down. Spend down exits must be planned in advance and must be managed carefully.

Current conversations on shifting the power include debates that argue funders should depart from traditional practices where they invest and preserve capital and spend only interest and dividends and instead apply the funding available to the multiple and complex problems that currently faces society.



RESOURCES

- **How to Create a Checklist for Nonprofit Exit.** This Stanford Social Innovation Review article by Kimberly Lemme and Kelly Latham provides advice on how to approach exit strategies from a sustainability perspective. Read it [here](#).
- **Heading for the Exit? 5 Considerations for Funders from Collective Conversations.** This article by Sharon Bissell, Richard Christel, and Michael Jarvis provides guidance on how to manage exits better. Read it [here](#).
- **The Importance of Planning Exit Strategies for NGOs.** This GivingCompass article for the Stanford Social Innovation Review explains how planning exit strategies can help tackle systems change and promote sustainability. It also provides ideas for funders to help implementing partners process, communicate

and manage exit planning. It also provides practical advice for designing impactful exit strategies. Read it [here](#).

- **What is your exit, er, commitment strategy.** This Bridgespan article by Matt Forti explores how perspectives from funders and implementing partners differ when it comes to exits. Read it [here](#).
- **Saying Goodbye: Exiting Grantee Relationships with Care.** This Bridgespan article provides guidance for funders on how to undertake exits responsibly. Read it [here](#).
- **Exiting Responsibly: Best Donor Practices in Ending Field Support.** This study for the Robert Wood Johnson Foundation by Janice Petrovich includes indicators of a successful project exit. Read it [here](#).
- **Do I Spend Down or Form a Foundation in Perpetuity?** This Bridgespan GiveSmart publication, provides guidance on thinking through key issues regarding spending down or giving in perpetuity. Read it [here](#)
- **The Atlantic Foundation spend down.** This article provides a different perspective on the recent decision to dissolve the Atlantic Foundation. “Some refer to Atlantic as the largest ‘spend down’ foundation. They are wrong. We did not spend down. We converted our funds to accelerate the efforts of others to help people.” Read it [here](#).

IPASA RESOURCES

- **Planting seeds: The closure of the Community Development Resource Association (CDRA) as one further development in a living process.** This article by Sue Soal describes the process of closing the CDRA, and the learnings from the process, which involved extensive reflection through a series of initiatives. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

The first workshop of the 2022 IPASA Grant Craft workshop series focused on Grant Exits where the challenges and practices regarding funding exits were discussed. The Millennium Trust, the Standard Bank Tutuwa Community Foundation, the Harry Crossley Foundation, and The Lewis Foundation shared their experiences and learnings regarding grant exits and exit strategies. Inputs were also received from the Social Change Assistance Trust (SCAT) regarding their role in the closure of the Community Development Resource Association (CDRA), and information was shared regarding the extensive spend-down exit of the Nicholson Foundation in the United States of America (USA). Read more [here](#).

5.7 MONITORING, EVALUATION, REFLECTION, LEARNING AND REPORTING

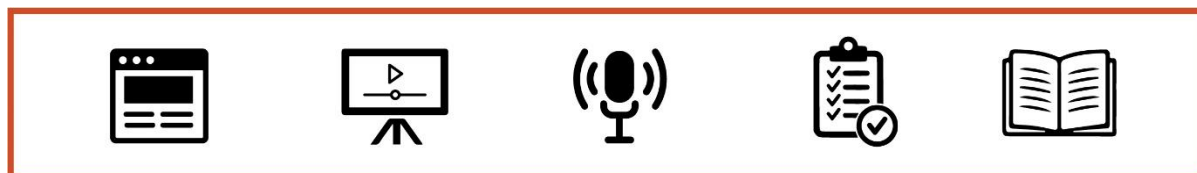
Monitoring, evaluation, reflection, learning, and reporting practices are key to ensure that evidence-based funding can support what works and that what does not work so well can either be improved or replaced with projects, programmes, models, and approaches that do work. As with all other aspects of grant-making and management, approaches, practices and tools used to perform these functions vary considerably. Multiple variables influence what, gets monitored and evaluated; how, when and by whom this is done; and to what extent reflection and learning is factored into these processes.

There is a move away from funder-driven monitoring and evaluation (M&E) to monitoring and learning with shorter feedback loops that enables quick adaptation and improvements, through which learning is integrated into programme implementation on an ongoing basis. Importantly, learning does not only include learning from what works – it also includes learning from failure.

There is also increased appreciation for the value of more active involvement of grant recipients in monitoring, evaluation, reporting and learning (MERL) processes, which means that the purpose of these activities are no longer driven only by the needs of funders. In line with the shifting the power movement, there is more

demand and appetite for implementing partners to play a more active role in MERL and to ensure that the data collected through these processes and activities can be used by implementing partners and funders.

When equitable funding practices are followed, implementing partners are able to contribute to decisions on what success will look like, how it will be measured, how data will be collected, and who will collect, collate and interpret the data.



RESOURCES

- **Evaluation Can Help Us Learn What Works if We Fix It.** This article by Rhonda Evans, Gabriel Kasper, and Tony Siesfeld argues that while new data methods, tools, and analytics continue to grow, both funders and non-profits sometimes struggle to apply these advances, and grapple with integrating the information that comes out of monitoring, evaluation and learning into decision-making processes. Read it [here](#).
- **Monitoring, Evaluation, and Learning in Philanthropy: Common Practices and Challenges.** This blog post by Julia Klebanov summarises key trends and issues regarding Monitoring, Evaluation and Learning in the philanthropy sector. Read it [here](#).
- **Expanding the Scope of Trust-Based Philanthropy: How Funders are Helping Reshape Learning & Evaluation.** This blog by Jazmin Segura calls for philanthropy to reimagine learning and evaluation in alignment with community priorities. Read it [here](#).
- **The Equitable Evaluation Framework** challenges the way in which evaluation currently works, and proposes a shift in mindset and practice so that evaluation can adapt to the need for more equitable evaluation practices that shifts the power in between funders and implementing partners. Read it [here](#).
- **The Centre on African Philanthropy and Social Investment (CAPSI)** has published a series of case studies on African Philanthropy in collaboration with the Wits Business School's Case Centre, including cases on monitoring and evaluation at the Momentum Metropolitan Foundation. Read it [here](#).
- **Is philanthropy finally ready to embrace intelligent failure?** In this Alliance Magazine article Donika Dimovska writes that failure is still rarely acknowledged by philanthropy, mostly because it is poorly understood. She says there is a need to de-mystify the *why, what, how* of failure. [Read more](#)
- **Alliance event: Learning from failure in philanthropy.** In this article Annmarie McQueen reflects on why funders don't always learn from failure optimally. The article includes a video recording of the AVPN Learning from Failure in Philanthropy event. Find out more [here](#).

IPASA RESOURCES

- **Evaluation - a key strategic lever to make sure that every project and programme makes climate its business.** This article was co-created by IPASA and the SAMEA-led team responsible for developing a working definition of an environmental sustainability criterion for evaluation in South Africa. It shows how evaluation can fast-track climate considerations in programmes and projects. Read it [here](#).
- **How evaluation promotes evidence-based philanthropy.** This article by the Zenex Foundation makes the case for an evidence-based approach to grant-making in the education sector and shows how the Zenex Foundation uses evaluation to promote evidence-based programming and funding. Read it [here](#).

- **Scaling up education initiatives requires a collaborative network of partners.** Joy Olivier, a research consultant to The Learning Trust argues that consideration must be given to appropriate approaches to test models, measure impact and produce evidence. Read it [here](#).

IPASA MEMBER ONLY RESOURCES

IPASA held a workshop in April 2020 to discuss Monitoring and Evaluation in the philanthropy sector. A recording of the meeting is available [here](#).

In the IPASA workshop on grant programme management tools and software, the Harry Crossley Foundation shared their journey with developing a bespoke M&E system. See the presentation [here](#).

RESOURCES

6. TOOLKITS, GUIDELINES AND BOOKS

This section includes a selection of toolkits and guidelines on grant-making that covers various aspects of the grant cycle; and books on philanthropy that provides insight on the development of philanthropy, the trends and themes in philanthropy and approached to philanthropic funding.



BOOKS ON PHILANTHROPY

Changing Systems, Changing Lives: Reflecting on 20 Years. This book captures The Nicholson Foundation’s spend down. Download the book [here](#).

Fixing Philanthropy: Six Principles for Actually Improving the World When Giving Away Money. Read the book review [here](#).

From Generosity to Justice: A New Gospel of Wealth. Darren Walker, president of the Ford Foundation articulates a bold vision for philanthropy in the 21st century joined by an array of thinkers, activists, and leaders from every field, sector, and walk of life. Read it [here](#).

Generation Impact: How Next Gen Donors Are Revolutionizing Giving. The updated and expanded edition of this book reveals the “impact revolution” that the rising next generation of donors seek. The book has first-hand accounts and expert analysis of hands-on, boundary-pushing strategies, and includes new, practical resources, e.g., three Best Practice Guides for nonprofits and fundraisers, families, and advisors. Read it [here](#).

Modern Grant-making, by Gemma Bull and Tom Steinberg, is a practical guide for grant makers who want to “be reformers” and who “believe better is possible. Read more [here](#).

In Defence of Philanthropy. This book by Beth Breeze provides insights in the function, purpose, meaning and usefulness of philanthropy. Find it [here](#).

Striking the Rights Chord. Striking the Rights Chord is an anthology of perspectives on the resourcing and sustainability of non-profit human rights organisations in contemporary South Africa. The dominant message is that a strong and sustainable civil society sector is essential to human rights, social justice, and democracy in this country. This book can be purchased [online](#) or directly from Shelagh Gastrow.

Terra Incognita: 100 Maps to survive the next 100 years. This book by Ian Goldin and Robert Muggah provides rich visual depictions of the large trends and threats shaping the world at present and into the future. It is a resource that can assist funders to understand the major challenges that philanthropic funding can respond to. Read it [here](#).

The final decade of Atlantic philanthropies – Our Founding Story. See more about this book by Mary Byrne McDonnell [here](#), and access the e-book, [here](#).

The Systems Work of Social Change. This book by Cynthia Rayner and Francois Bonnici includes an in-depth analysis and unpacking of the principles, practices, and tactics of eight leading social purpose organizations, and uncovers a new understanding and approach to social change that is as subtle as it is radical. For more information about the book click here [website](#). Read an extract from the book [here](#).

The Tech That Comes Next: How Changemakers, Philanthropists, and Technologists Can Build an Equitable World by Amy Sample Ward and Afua Bruce. This book is about opportunities for funders and other development stakeholders to change their relationship to technology, and to create more equitable processes and relationships, with the aim to build a more inclusive future. The authors say: “This is a book about technology. This a book about equity. This is a book about how we can meet community needs. More than anything, this a book that asks you to ask questions.” [Read it here](#)

PHILANTHROPY TOOLKITS

Toolkit for African Philanthropists. Volume 2. This toolkit of the African Philanthropy Forum (APF) is organised around key issues related to sustainable philanthropy. Read it [here](#).

Toolkit for African Philanthropists. 1st Edition. This APF publication is a practical handbook that includes information, short case studies, steps, and questions about key issues in philanthropy. Read it [here](#).

Next Generation Grant-making guide. This guide is primarily focused on CSI funders, but also contains useful information for independent philanthropic funders. Read it [here](#).

ANNEXURES

ANNEXURE A: SOUTH AFRICAN SCENARIOS FOR THE FUTURE

1. SCENARIO PLANNING BEYOND THE COVID-19 PANDEMIC

These scenarios were developed by the Global Compact Network South Africa as planning tool for business. The economic and socio-political landscapes were identified as the two key drivers of risk. The scenarios include a guide to identify key signals and the response to take for each scenario. It also shows how the different scenarios will impact on achievement of specific Sustainable Development Goals (SDGs).

A harvest for all: A steady and innovative pathway towards a positive and sustainable future for both our people and our environment, supported by a thriving economy.

Planting for some: A conflicted socio-political landscape where we have protected our economic landscape, at the cost of wider equality.

Lying fallow with weeds: A landscape where we are united as a people, but where our economic prosperity is compromised, and we are unable to finance our future potential.

Drought and desolation: A critical fight to protect our economic and political landscape, protecting people from the extreme consequences of negative impact.

Read more [here](#).

2. THE INDLULAMITHI SCENARIOS SOUTH AFRICAN SCENARIOS 2030

These scenarios comprise of three visions of South Africa's future, each typified by a popular dance:

iSbhujwa – An enclave bourgeois nation: Loose-limbed and jumpy, with a frenetic edge, iSbhujwa is a South Africa torn by deepening social divides, daily protests, and cynical self-interest.

Nayi le Walk – A nation in step with itself: The precision of steps in Nayi le Walk and the confident spirit denote a country where growing social cohesion, economic expansion and a renewed spirit. Constitutionalism get the nation going.

Gwara Gwara – A floundering false dawn: The people of South Africa are torn between immobility and restless energy, and Gwara Gwara is the name for a demoralised land of disorder and decay.

Read more [here](#).

3. SOUTH AFRICA SCENARIOS 2025: THE FUTURE WE CHOSE?

These scenarios were prepared by the Policy Co-ordination and Advisory Services (PCAS) in the Presidency as a companion piece to the Towards a Fifteen Year Review report reflecting on impact of public policies. Includes three scenarios:

Not yet Uhuru: A Government strongly committed to accelerating economic growth struggles in the face of deteriorating global conditions and severe ecological challenges.

Nkalakatha: Determined to play a more central role in the economy, Government prioritises poverty reduction and skills enhancement by articulating a national vision and fostering partnerships...

Muvhango: Despite an initial resurgence of the economy, and positive world conditions, the Government battles to govern well.

Read more [here](#).

4. EARLIER SCENARIOS

South African Scenarios 2024 (developed in 2017):

Jakkie Cilliers and Ciara Aucoin from the Institute for Security Studies (ISS) has developed three possible futures for South Africa:

Bafana Bafana: The economy remains firmly stuck in a middle-income trap, accentuated by policy vacillation, investor uncertainty, poor political management, and bad implementation. Traditionalists and reformers are at each other's throats within the ANC in an ongoing tussle for control over state resources.

Mandela Magic: Reformers emerge victorious from the December 2017 ANC National Conference and adopt policies that allow for a restructuring of the economy to unleash pent-up growth potential. Alternatively, a 2018 split in the ANC could result in the formation of a new party of interesting alliances (particularly in Gauteng) that could change 2019 national and provincial election outcomes.

Nation Divided: Traditionalists triumph during the December 2017 ANC National Conference, possibly resulting in a split in the party and the emergence of coalition politics earlier than in any other scenario.

The 2020 Dinokeng scenarios for 2020 (developed in 2009):

Walk together: This is a scenario of active citizen engagement with a government that is effective and that listens.

Walk behind: This is a scenario where the state assumes the role of leader and manager.

Walk apart: This is a scenario of "musical chairs" or "reshuffled elites". It is triggered by the failure of leaders.

Read more [here](#).

The **Mont Fleur Scenarios** were developed in the period 1991 to 1994 and developed scenarios looking at what South Africa will be like in the year 2002? The two axes were whether a negotiated settlement will be reached, and whether government's policies will be sustainable. The scenarios identified were:

Flight of the flamingo: Inclusive democracy and growth.

Icarus: Macro-economic populism

Lame duck: Incapacitated government

Ostrich: Non-representative government.

Read more [here](#).