



W I N G S
ELEVATING PHILANTHROPY

Understanding the Meaning of Terms

Definitions and Taxonomy



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Table of contents

4 Why we need to have a better understanding of the words we use

5 Types of PSOs

11 PSO functions

16 Applying and strengthening this taxonomy

17 Annexure

This document is part of the publication 'Acting Together to Lift Up Philanthropy: WINGS guidance on How to Build a Supportive Ecosystem'

Why we need to have a better understanding of the words we use

Philanthropy support organisations (PSOs) can play important roles in philanthropy, but their contributions are often not either articulated or appreciated. One of the reasons for this is the lack of a common understanding of what PSOs are and the different roles that they play.

Recognising this gap in understanding, WINGS has developed a globally applicable and locally adaptable taxonomy, with the support of Sattva. This is designed to enable more international dialogue, on the roles and contributions of PSOs in different ecosystems. This taxonomy builds on the [WINGS 4Cs framework](#), developed in partnership with Dafne, in 2017, to classify the contributions of PSOs in enhancing the capacity, capability, connection and credibility of philanthropy.

Purpose

This part of the research attempts to define philanthropy support ecosystems (PSEs) and to classify and define PSO entities and their functions. The purpose is to foster the use of a common language and mutually understandable definitions.

This taxonomy is not intended to impose one classification system or language across different regions. Instead, it is intended to enable further dialogue, across the breadth and depth of the field. Readers are strongly encouraged to share feedback and recommendations to strengthen its efficacy and relevance in local contexts. Please share your comments via email to info@wingsweb.org.

Defining the central items of the study

There are three concepts at the heart of this study. These are 'philanthropy', the 'philanthropy support ecosystem' and the 'philanthropy support organisation'. These are defined as follows:

What is philanthropy?

Philanthropy refers to the practice of giving time, money, experience, skills and or talent, all with the altruistic objective of improving human welfare. It includes individual giving by everyday givers and high net-worth individuals, or institutional giving through corporates, foundations and other specialised institutions.

What are philanthropy support organisations (PSOs)?

Philanthropy support organisations, sometimes referred to as 'intermediary' or 'infrastructure' organisations, include entities that provide a variety of services to support and strengthen philanthropy in a region or around a theme. PSOs usually do not directly fund or implement philanthropic programmes themselves, but rather provide services to support those that do. That said, some philanthropic funders do provide ecosystem support services too, so the distinction is not always clear-cut.

What is a philanthropy support ecosystem (PSE)?

The community of interacting organisations, functions and activities that assists and enables the achievement of philanthropy's potential by nurturing its capacity, capabilities, connection and credibility.

Research methods

“Some of these words go over your head as someone on the ground level - It isn’t a commonly used word in my day to day type of work.”

— Janet Mawiyoo, Kenya Community Development Foundation

To ensure that the WINGS taxonomy is rooted in a deep understanding of various ecosystems and provides for fluid and flexible classification of PSOs, field experts, practitioners and researchers across the globe were consulted at every stage of the development process, the main steps of which are outlined below:

STEPS

- 1 **Literature review** of past efforts undertaken by WINGS, Candid and Centre for Social Impact and Philanthropy (CSIP) to understand existing taxonomy classifications.
- 2 **Review of entity focuses, functions and clients** as articulated by 32 PSOs globally to develop a new preliminary framework.
- 3 **Semi-structured interviews with 25 global experts** in the following categories to validate the framework (see [Annexure 1](#) for a complete list):
 - a. Heads of networks or platforms that convene stakeholders in philanthropy
 - b. Current heads or directors of research units and academic institutions on philanthropy
 - c. PSE enablers (Funders, and PSOs): Practitioners previously interviewed, or panellists at PSE forums, or member of global networks with 10+years’ experience
- 4 **Editorial committee consultations on a regular basis** to gain regular feedback and suggestions on the development of the functions and entity-based classifications.
- 5 **A survey to which 65 organisations responded in 14 countries** including Israel, Senegal, Romania, Brazil, India, Russia and Kenya, to validate the widespread use and relevance of the taxonomy (See [Annexure 2](#) for a complete list).

Types of PSOs

The PSE is made up of support organisations, funders and implementing organisations. Most of the support organisations tend to be PSOs, and are often referred to as “infrastructure” organisations.

PSOs within a PSE can fall into three large buckets:

- 1 **PSOs that focus on philanthropy**
 - Academic institutions and think-tanks
 - Advocacy platforms and experts
 - Citizen engagement organisations
 - Consulting, advisory and M&E firms
 - Donor advised funds
 - Funding, implementation and learning groups and collectives
 - Fundraising and online giving platforms

- Giving movements
- Information and technology solution providers
- Intermediary, joint and community funds
- Media, knowledge and data sharing platforms
- Geographic networks and associations
- Standards, certification, accreditation and benchmarking agencies
- Thematic networks and associations

2 Organisations that enable philanthropy as a subset of their main functions

- Audit firms
- Banks/wealth management firms
- Data analytics organisations
- Fellowships and talent management organisations
- Incubators and accelerators
- Law firms
- Mainstream consulting firms
- Marketing and PR Firms
- Non-profit organisations
- Social media and technology platforms

3 Funders of the support ecosystem

- Individual funders
- Private institutional funders
- Multilateral and bilateral development finance agencies and other development funders, INGOs

This section categorises PSOs in each of these buckets according to the entity focus they see themselves in, for example, network, think-tank, consulting firm.

1. PSOs that focus solely on philanthropy

The section below looks at those organisations whose main purpose is to support the development and effectiveness of the philanthropy and giving field.

Table 1: Organisations whose main purpose is to support the development and effectiveness of the philanthropy and giving field

| Entity focus | Definition | Examples |
|--|--|--|
| Academic institutions and think-tanks | An institution or organisation that grants degrees or diplomas or provides executive education for the development of talent for the philanthropic sector and/or conducts research on philanthropy and giving. | <ul style="list-style-type: none"> • Centre for Social Impact and Philanthropy, Ashoka University, India • Centre for Strategic Philanthropy, Cambridge Judge Business School, United Kingdom • Centre on African Philanthropy and Social Investment (CAPSI), University of the Witwatersrand, Johannesburg, South Africa • Centro de Filantropia e Inversiones Sociales (CEFIS), Universidad Adolfo Ibáñez, Chile • Lilly Family School of Philanthropy, Indiana University, USA |

| Entity focus | Definition | Examples |
|--|---|---|
| Advocacy platforms and experts | Platforms or groups that lobby for or provide expertise for others to advocate for an enabling policy environment for philanthropy. | <ul style="list-style-type: none"> Asia Policy Forum, (Asian Venture Philanthropy Network), Asia-Pacific France Generosites, France "F20 Foundations", G20 Philanthropy Advocacy, Europe SDG Philanthropy Platform, Global TrustLaw, Global The International Center for Not-for-Profit Law (ICNL), Global |
| Citizen engagement organisations | Organisations that encourage and create a platform for strengthening of non-financial private resources for the common good, such as time, expertise, and all forms of volunteering. | <ul style="list-style-type: none"> International Volunteer HQ, New Zealand/Global iVolunteer, India Make a Difference, India National Volunteer & Philanthropy Centre (NVPC), Singapore Pro Bono Economics, United Kingdom United Nations Volunteers, Global |
| Consulting, advisory and M&E firms | Social sector firms who provide advice to PSE stakeholders for a fee on issues like strategy, programme implementation, internal organisation and governance, and so on. | <ul style="list-style-type: none"> Bridgespan Group, USA Global CivSource-Africa, Uganda/Africa Instituto para o Desenvolvimento do Investimento Social (IDIS), Brazil Sattva Consulting, India/Global |
| Donor advised funds | Private funds administered by a third party and created for the purpose of managing charitable donations on behalf of an organisation, family, or individual. | <ul style="list-style-type: none"> Charities Aid Foundation (CAF), United Kingdom/Global Fidelity Charitable Donor-Advised Fund, USA Silicon Valley Community Foundation, USA |
| Funding, implementation and learning groups and collectives | A group of actors, sometimes from different sectors, collaborating to solve a particular social problem, using a structured form of collaboration, centralised infrastructure, dedicated staff and processes with shared measurement, communication and activities. | <ul style="list-style-type: none"> Asia Philanthropy Circle, Singapore/Asia-Pacific Co-Impact, USA/Global Dasra Giving Circles, India Global Partnership for Education, Global Network of European Foundations, Europe SDG Partnership Platform, Kenya |
| Fundraising and online giving platforms | Platforms and enablers which raise funds and generate capital for philanthropy and social causes. | <ul style="list-style-type: none"> Global Giving, Global Ribon, Brazil Tencent Charity, China |
| Giving movements | Organisations that promote the giving and generosity culture. | <ul style="list-style-type: none"> ELLAS: Mujeres y Filantropía, Argentina Giving Tuesday, USA Giving Pledge, USA/Global The Funding Network, United Kingdom |
| Information and technology solution providers | Organisations providing professional services designed to facilitate the use of technology to bring in efficiencies in systems and processes for donors and end users. | <ul style="list-style-type: none"> Charity Digital, United Kingdom Italia non profit, Italy TechSoup, USA/Global Tech For Good, Global |
| Intermediary, joint and community funds | Grantmaking public charities or intermediaries that bring together, maintain and administer the financial resources of multiple donors to support a specific cause, type of population or regional community. | <ul style="list-style-type: none"> Community Development Venture Capital Alliance, USA Foundation Mozaik, Bosnia Fundo Elas, Brazil Kenya Community Development Foundation, Kenya Singapore Community Foundation, Singapore |

| Entity focus | Definition | Examples |
|--|---|---|
| Media, knowledge and data sharing platforms | Digital or print platforms which seek out, cultivate and disseminate the best in research, data and practice based knowledge on issues of relevance to philanthropy and giving actors in their target audience. | <ul style="list-style-type: none"> • <i>Alliance Magazine, United Kingdom/Global</i> • <i>Candid, USA</i> • <i>China Foundation Center, China</i> • <i>India Development Review, India</i> • <i>Stanford Social Innovation Review (SSIR), USA</i> • <i>Yishan, China</i> |
| Geographic networks and associations | Organisations that bring together PSE stakeholder segments or all PSE stakeholders (funders, implementing social purpose organisations, PSOs, government) in a specific geography to share knowledge and encourage collaboration. | <ul style="list-style-type: none"> • <i>Africa Philanthropy Network (APN), Africa</i> • <i>Asian Venture Philanthropy Network (AVPN), Singapore/Asia-Pacific</i> • <i>Council on Foundations, USA</i> • <i>European Foundation Centre, Europe</i> • <i>Group of Institutes, Foundations and Enterprises (GIFE), Brazil</i> • <i>Russian Donors Forum, Russia</i> |
| Standards, certification, accreditation and benchmarking agencies | A state-controlled or privately supported agency authorised to grant accreditation to PSE stakeholders like non-profit institutions to enhance their credibility and that of the sector. | <ul style="list-style-type: none"> • <i>GiveIndia, India</i> • <i>Guidestar (Candid), Global</i> • <i>Pakistan Center for Philanthropy's Certification Programme, Pakistan</i> • <i>Viwango, Kenya, Sub-Saharan Africa</i> |
| Thematic networks and associations | Organisations that bring together PSE stakeholder segments or all PSE stakeholders (funders, implementing social purpose organisations, PSOs, government) focused on a common cause or interest to share knowledge and encourage collaboration. | <ul style="list-style-type: none"> • <i>ABCR - Brazil Fundraisers Association, Brazil</i> • <i>Ariadne, Europe</i> • <i>Australian Environmental Grantmakers Network, Australia</i> • <i>Dafne – Donors and Foundations Networks in Europe, Europe</i> • <i>International Funders for Indigenous Peoples (IFIP), USA</i> • <i>Rede de Filantropia para a Justiça Social, Brazil</i> |

2. Organisations that enable philanthropy as a subset of their main functions

As the PSE grows and PSOs evolve to take on more functions and serve more stakeholders, their entity focus widens. Additionally, the need for specialised services increases, which attracts several mainstream organisations to step in and provide services to the philanthropic sector. The section below looks at the various entity focuses of intermediaries that enable the growth of philanthropy in the PSE as part of (but not focus of) their functions.

Table 2: Organisations that enable philanthropy as a subset of their main functions

| Entity focus | Definition | Examples |
|--------------------------------------|--|---|
| Audit firms | Organisations which review a company's governance and operations, including its social responsibility and impact on society. | <ul style="list-style-type: none"> • <i>KPMG, Global</i> • <i>PWC, Global</i> |
| Banks/wealth management firms | Organisations offering financial management services such as strategic planning, and asset management to philanthropic institutions or individuals, and implementing social purpose organisations. | <ul style="list-style-type: none"> • <i>I&M Bank, Kenya, Sub-Saharan Africa</i> • <i>Barclays, Global</i> • <i>Pence Wealth Management, USA/ North America</i> |

| Entity focus | Definition | Examples |
|---|--|---|
| Data analytics organisations | Organisations which undertake or enable the analysis of raw data in order to make conclusions about that information and enable decision making. | <ul style="list-style-type: none"> • <i>Candid</i> • <i>Accenture Analytics, Global</i> • <i>Data Science for Social Good, USA/North America</i> • <i>DataKind, Global</i> • <i>SAS Insights, Global</i> |
| Fellowships and talent management organisations | Organisations or programmes that develop, find and recruit employees to enhance the efficiency of PSOs and other PSE stakeholders. | <ul style="list-style-type: none"> • <i>Amani Institute, Kenya, Global</i> • <i>Ashoka Changemakers, India, Global</i> • <i>JobsforGood, India</i> • <i>Third Sector Partner, India</i> • <i>Indeed, Global</i> • <i>LinkedIn, Global</i> |
| Incubators and accelerators | Incubators provide crucial support and mentoring in the early years of a social enterprise to speed up their development. | <ul style="list-style-type: none"> • <i>Echoing Green, Global</i> • <i>Fledge, Global</i> • <i>Villgro, India</i> • <i>Yunus Social Business, Global</i> |
| Law firms | Provide legal advice and assistance to PSOs and other PSE stakeholders, sometimes on a pro bono basis. | <ul style="list-style-type: none"> • <i>Centre for Advancement of Philanthropy, India</i> • <i>iProbono, Global</i> • <i>The Law Firm for Non-Profits, USA</i> |
| Mainstream consulting firms | Firms who provide advice to PSE stakeholders, but which are not dedicated advisers on issues like strategy, programme implementation, internal organisation and governance, etc. as part of their work for a fee | <ul style="list-style-type: none"> • <i>McKinsey, Global</i> • <i>BCG, Global</i> |
| Marketing and PR firms | Organisations that manage and spread public awareness of the value and work of PSE stakeholders, advocating for their interests, mobilising public support in their favour and protecting them against reputational risks. | <ul style="list-style-type: none"> • <i>APCO Worldwide, Global</i> • <i>Good Kenyan, Kenya</i> • <i>Matrix India Entertainment (Matrix Bay), India</i> • <i>Ogilvy and Mather, Global</i> |
| Non-profit organisations, networks and support organisations | Organisations dedicated to furthering a particular social cause (environment, gender, poverty, and so on) by strengthening the philanthropic environment through activities and strategies such as capacity building services for local partners on fundraising, mobilising local assets, building bridges with private funders, or advocacy in favour of enabling policies for donations. | <ul style="list-style-type: none"> • <i>Child Rights and You (CRY), India</i> • <i>Impact Hub, Global</i> • <i>Our Future Foundation Poland, Europe</i> • <i>Social Enterprise Society of Kenya (SESOK), Kenya/Sub-Saharan Africa</i> • <i>Civicus, Global</i> • <i>Voluntary Action Network India (VANI), India</i> • <i>West Africa Civil Society Institute (WACSI), West Africa</i> |
| Social media and technology platforms | Computer-mediated technologies that facilitate the creation or sharing of information, ideas and support donations, fundraising outside of the main purpose of the corporation. | <ul style="list-style-type: none"> • <i>Tencent, China</i> • <i>Alibaba, China</i> • <i>Facebook, Global</i> |

3. Funders of the support ecosystem

Foundations and other philanthropic funders are not PSOs as such, and are not usually included in this classification. However, they can sometimes act as PSOs when they fund the support ecosystem and/or provide support services themselves, so the distinction is not always clear-cut. Additionally, other private, public, and multilateral funders can play an important role as investors in the development of the support ecosystem. The section below looks at the focus of such organisations.

Table 3: Funders of the support ecosystem

| Entity focus | Definition | Examples |
|---|--|---|
| Government | Government departments that fund, administer or implement government programmes and policies relating to philanthropy. | <ul style="list-style-type: none"> • <i>Civic Chamber of Russian Federation, Russia</i> • Ministry of Corporate Affairs, India |
| Individual funders | Individuals that provide financial and non-financial support to other organisations and sometimes individuals. This could include High Net-Worth Individuals (HNIs) and everyday givers. | <ul style="list-style-type: none"> • Azim Premji, India • Doug Miller, USA • Laurence Lien, Singapore • Jack Ma, China • Everyday givers |
| Private institutional funders | Organisations that provide financial and non-financial resources to enable the development of philanthropy and giving. This could include corporate, independent and family foundations. | <ul style="list-style-type: none"> • <i>CS Mott Foundation, USA</i> • <i>Fondation de France, France</i> • <i>Narada Foundation, China</i> • <i>Sawiris Foundation for Social Development, Egypt</i> • <i>The Vladimir Potanin Foundation, Russia/Global</i> |
| Multilateral and bilateral development finance agencies and other development funders, INGOs | Bilateral aid is funding given directly from one foreign government. Multilateral aid is provided by different governments and organisations. These, together with International NGOs (INGOs) sometimes invest in specific aspects of the ecosystem. | <ul style="list-style-type: none"> • Bilateral cooperation agencies (USAID, JICA, etc.) • <i>EU Devco, Europe</i> • <i>United Nations (UN), Global</i> • <i>United Way, Global</i> • Comic Relief, UK |

While this taxonomy proposes a classification system, the reality on the ground is likely to be different as not every organisation can neatly fit into pre-defined brackets.

A PSO may see itself as operating in more than one category. Responses of 50 PSOs who participated in the survey to validate the use and relevance of the taxonomy across Russia, Kenya and India, revealed that across the countries, the median number of entity focuses an organisation strongly identified is two, whereas the median number of entity focuses an organisation somewhat identifies with ranges from three to five, as seen in the table below.

Table 4: Country wise entity-focuses of PSOs

| | Kenya | India | Russia |
|---|---|---|---|
| Number of focuses organisations strongly identified with | 2 | 2 | 2 |
| Number of focuses organisations somewhat identified with | 3 | 5 | 5 |
| Popular entity focuses | Funders and Knowledge sharing platforms | Knowledge sharing platforms, Advocacy platforms, Consulting firms, Networks | NGOs and funders |
| Missing entity focuses | N/A | PR Firms | Accreditation agency, Audit firms, Banks, and Talent management organisations |



“PSE is surprisingly similar in different parts of the world, so if a taxonomy is diverse enough it will probably hit the bill everywhere. However, language may be a different thing and will have to be looked at in the moment of translation.”

— Maria Chertok, CAF Russia

Survey results showed that most PSOs that identified as ‘networks’ also tended to identify as ‘knowledge sharing platforms’, and some organisations that provide multiple types of advisory services identified as ‘consulting firms’ as well as ‘M&E firms’, ‘technology solution providers’, and so on. Additionally, different entity focuses are interpreted differently in different cultures and are unlikely to be uniformly adopted across regions. Factor analysis of the survey data in Russia, India and Kenya revealed eight broad categories as summarised in the table below.

Table 5: Emerging entity focuses of PSOs across India, Russia and Kenya





| Emerging categories | Constituent PSOs |
|---|---|
| Professional service organisations | Audit firms, banks/wealth management firms, incubators, law firms, M&E firms, media, PR firms |
| Grassroot organisations and collectives | Advocacy platforms, citizen engagement organisations, collectives, law firms, research groups/think tanks, technology solutions, social sector/mainstream, NGOs |
| Networks and advocacy organisations | Advocacy platforms, collectives, incubators, knowledge sharing platforms, networks |
| Knowledge and consultancy firms | Advocacy platforms, consulting firms, data platforms, M&E firms, media, research groups /think tanks |
| Data and information organisations | Accreditation agencies, data platforms, technology solutions, funders |
| Talent and leadership development | Fellowships and talent management organisations |
| Academia | Academic institutions and incubators |
| Citizen engagement bodies | Academic institutions, citizen engagement organisations and networks |

This table does not account for certain categories of PSOs such as donor advised funds, corporates, community foundations and joint funds that were added after analysis of the survey data. This classification by entity focus is meant to be a first attempt and is expected to evolve through application. The results from the field go to show that more PSOs groupings and entity focuses are likely to emerge as this taxonomy is adopted, applied and strengthened over time. This section classifies PSOs by the functions they serve, for example, generating resources, strengthening knowledge and data, and so on.

PSO functions

This section classifies PSOs by the functions they serve, for example, generating resources, strengthening knowledge and data, and so on.

Most organisations working in the philanthropy support ecosystem perform a number of functions. For the purpose of this classification, these are grouped according to the 4C framework that looks at the contributions PSOs make to enhancing the ‘4Cs’:

- 1  **Capacity** Generating organisations' financial, human and infrastructure resources for philanthropy.
- 2  **Capability** Enhancing philanthropy outcomes by strengthening organisational strategies, implementation, knowledge, data and skills.
- 3  **Connection** Creating forums/platforms/networks for collaboration, peer-learning, and action in pursuit of a common purpose at the ecosystem level.
- 4  **Credibility** Enhancing the reputation, transparency, recognition and influence of philanthropy at an ecosystem level among the government and wider society.

1. Capacity

Generating organisations' financial, human and infrastructure resources for philanthropy.

Table 6: PSE needs and PSO functions in terms of capacity

| PSE needs | Functions served by PSOs to meet PSE needs | Examples of the functions |
|---------------------------------------|---|---|
| Generating human resources | Providing talent recruitment services | Talent acquisition firm sourcing professional applicant for the role of a grant manager |
| | Providing access to other organisations' professional services | Incubators providing grantees access to legal or other professional services |
| Generating financial resources | Conducting fundraising programmes or campaigns to promote the culture of giving | A fundraising platform running a fundraising campaign for NGOs, or a high net-worth individuals pledge |
| | Conducting business development activities | A PR firm generating press attention for a foundation's latest work attracting more donors to the campaign |
| | Conducting financial planning and fund management | A donor advised fund managing charitable donations on behalf of organisations, families, or individuals |
| Generating digital assets | Developing technology solutions for an organisation | A technology solution provider developing a software to allow foundations to closely track grants disbursement |
| | Standardising organisational systems and processes | A mainstream consulting firm developing a process flow and checklist for a foundation's grantee due diligence process |

2. Capability

Enhancing philanthropy outcomes by strengthening organisational strategies, implementation, knowledge, data and skills.

Table 7: PSE needs and PSO functions in terms of capability

| PSE needs | Functions served by PSOs to meet PSE needs | Examples of the functions |
|---|--|---|
| Co-creating and augmenting strategies | Designing organisational or programme strategies | A social sector consulting firm working with an NGO to develop a roadmap to meet its financial requirements for the next financial year |
| | Providing organisation/programme/CSR/philanthropy strategy advisory | A consulting firm running a design thinking workshop to augment a foundation's programme implementation strategy |
| | Undertaking impact monitoring, evaluation and assessments | A consulting firm conducting scenario planning workshops for a government agency launching a new scheme for philanthropy support |
| | Designing or strengthening organisation models | An incubator fleshing out a viable business model for a social enterprise grantee that is entering a new market |
| Monitoring, learning and evaluation support | Conducting impact monitoring, evaluation and assessments | An M&E firm creating metrics and collecting data to understand the impact of an operating foundation's programme |
| | Conducting a stakeholder needs assessment | A donor advised fund evaluating the needs of grantees to enable strategic grantmaking for a corporate foundation |
| | Running an organisational diagnostic assessment | A wealth management firm benchmarking the financial health of a foundation via a standard questionnaire |
| Anchoring and supporting implementation | Providing programme implementation services | Consulting firm deploying their team to implement a project for a corporate's short-staffed Corporate Social Responsibility (CSR) unit |
| | Developing operational systems and processes | A mainstream consulting firm developing a process flow and checklist for a foundation's grantee due diligence process |
| Creating knowledge, data and ecosystem commons | Creating or aggregating a body of evidence or data | A funding database conducting nationwide data collection on the volume of philanthropy within a sector, for example, gender funding |
| | Conducting research and developing knowledge documents | A think-tank undertaking a primary research project and generating data and insights for ecosystem strengthening |
| | Creating frameworks and communities of practice | An academic institution developing a toolkit on community trust building |
| Enhancing human potential | Developing new educational course material | A mainstream academic institute offering coursework on marketing for philanthropy |
| | Strengthening leadership, management and operational capability through training | Fellowships for professionals in philanthropy to enhance their professional growth and experience |
| | Providing education and academic certification | An academic institution offering a program focused on support services for philanthropy |

3. Connection

Creating forums/platforms/networks for collaboration, peer-learning, and action in pursuit of a common purpose at the ecosystem level.

Table 8: PSE needs and PSO functions in terms of connection

| PSE needs | Functions served by PSOs to meet PSE needs | Examples of the functions |
|--|---|---|
| Facilitating interaction and inclusive spaces | Creating member-focused networks and platforms | A knowledge sharing platform creating an online forum for gender funders to share resources and form connections |
| | Organising PSE stakeholder convenings | A thematic network curating an annual conference to bring together education funders and grantees to discuss challenges in the sector |
| | Providing inclusive spaces and platforms for diverse voices | A geographic network creating a platform for community feedback on a regional challenge |
| Orchestrating collaborations: Structuring and managing partnerships, alliances and collective models | Structuring partnerships and collectives | A consulting firm that is managing a development impact bond |
| | Negotiating and managing multi-stakeholder interests | A law firm that facilitates negotiations among funders embarking on a partnership |
| Building and strengthening narratives | Providing branding, visibility and communication support | A marketing firm that builds and maintains a foundation's website and social media presence |
| | Sharing news and thought leadership | A knowledge sharing platform that hosts content for spreading awareness on developments in local philanthropy |
| | Developing narratives and collective spaces | A thematic network that convenes key stakeholders to generate awareness on the potential role of philanthropy in driving change in the sector |

4. Credibility

Enhancing the reputation, transparency, recognition and influence of philanthropy at an ecosystem level among the government and wider society.

Table 9: PSE needs and PSO functions in terms of credibility

| PSE needs | Functions served by PSOs to meet PSE needs | Examples of the functions |
|--|---|--|
| Enhancing reputation and transparency: Contributing to increased confidence of stakeholders within the philanthropic ecosystem | Developing accreditation, transparency and benchmarking standards and norms | Accreditation agency developing a rating system to evaluate the credibility of social purpose organisations |
| | Providing due diligence, legal, compliance and auditing services | A standards and certification firm undertaking due diligence to evaluate a grantee's credibility for a foundation |
| | Providing PR services | A PR firm developing a strategy to address reputational risks resulting from a social purpose organisation's public campaign |

| PSE needs | Functions served by PSOs to meet PSE needs | Examples of the functions |
|-----------------------------|--|--|
| Enhancing public engagement | Enhancing public participation, active citizen engagement and trust in civil society | A citizen engagement organisation enlisting support from the public for implementation of a program |
| | Building issue awareness on civic issues among the public | A media platform creating public awareness on the importance of enabling policies and environment for philanthropy and civil society |
| | Mobilising field action, advocacy and lobbying | An advocacy organisation organising a public rally or march to illustrate the role of foundations in tackling gender inequality |
| Influencing policy | Informing policy and ecosystem recommendations | A think-tank publishing an evaluation of the policies influencing philanthropy |
| | Establishing policy and legal frameworks for philanthropy | A foundation association submitting a policy brief to a national ministry on tax laws for individual donations |

It is important to note that while this taxonomy looks at ideal types of functions in theory, the reality on the ground is likely to be different as not everyone neatly fits into these categories. Survey findings reveal that across India, Russia and Kenya, the median number of core functions provided by an organisation is two or three, whereas the median number of auxiliary functions provided by an organisation ranges from four to six, as seen in the table below.

Table 10: Country wise functions of PSOs

| | Kenya | India | Russia |
|--|--|--|---------------------------------------|
| Number of core functions provided | 3 | 3 | 2 |
| Number of auxiliary functions provided | 4 | 5 | 5.5 |
| Popular core functions | Building and strengthening narratives, Enhancing human potential, Enhancing reputation and transparency, Facilitating interaction and inclusive spaces | Creating knowledge, data and ecosystem commons | Enhancing reputation and transparency |
| Popular auxiliary functions | Co-creating and augmenting strategies and Generating human resources | Influencing policy and Facilitating interaction and inclusive spaces | Influencing policy |

“It is important to define and study the entire ecosystem. However, this operation is not a goal in itself. It is a way to understand who we are instead of merely putting organisations into boxes. The boxing system might not work as organisations usually perform a variety of functions.”

— Oksana Oracheva, The Vladimir Potanin Foundation

This classification is meant to be a first attempt and is expected to evolve through application. Results from the field go to show that overlaps and commonalities across PSO functions are likely to emerge as this taxonomy is taken and applied across regions.

Applying and strengthening this taxonomy

As mentioned earlier in the report, this taxonomy does not intend to impose one classification system or language across regions. It is intended as a starting point for further dialogue, to bring out global similarities and regional variations. It will be strengthened by debate and application. Field experts, practitioners and researchers consulted highlighted the following areas to consider for strengthening the tool:

1

How can the taxonomy accommodate language and culture variations?

Even within the same language, interpretation of words can differ. For example, some countries may commonly adopt the term “philanthropy” while others prefer to use the term “giving”. Additionally, what comprises giving may vary from one community to another.

“Sometimes, words in our sector mean many things, and in different contexts and regions, they are likely to be misinterpreted. We need a short description to let people know what the various terms mean, so that everyone is on the same page.”

— Smarinita Shetty, India Development Review

2

How can the taxonomy evolve in parallel with the PSE to stay relevant?

The development and growth of the PSE also affects the relevance of a common language. As new entities and functions are added, the meanings of words change. Additionally, as a PSE evolves in time, the composition of entity types, functions and stakeholders served in the ecosystem also changes.

3

How can the taxonomy be meaningfully applied in daily work?

Taxonomies can sometimes appear as or be reduced to jargon that may not work effectively in everyday situations. This research effort has attempted to address this concern through multiple consultations with practitioners in different countries, though variations remain. In addition, as PSEs increase in complexity, new terms arise. These need to be noted and added to later versions of this taxonomy.

“I am not sure if it is possible to develop a common language. I may only use such language in an international forum, not in daily work.”

— Janet Mawiyoo, Kenya Community Development Foundation

Readers are strongly encouraged to share their feedback and recommendations on these areas and others to strengthen its efficacy and relevance across local contexts. Please share feedback via email to **info@wingsweb.org**.

Annexure

Annexure 1

Interviews for the taxonomy and guidance on how to map the field and the methods to assess the PSE

| Country/ Region | Respondent name and designation | Organisation |
|--------------------|---|--|
| United Kingdom | Michael Mapstone, Director International Affairs and Global Engagement | Charities Aid Foundation (CAF) |
| United Kingdom | Walter Viers, Regional Director for Central and Eastern Europe | C.S. Mott Foundation |
| India | Gautam John, Director of Strategy | Rohini Nilekani Philanthropies |
| India | Ingrid Srinath, Director | Centre for Social Impact and Philanthropy (CSIP), Ashoka University |
| India | Megha Jain, Associate Director - Strategic Philanthropy | DASRA |
| India | Paul Basil, Founder and CEO | Villgro |
| India | Priya Naik, Founder and CEO | Samhita |
| India | Ravi Sreedharan, Founder | Indian School of Development Management (ISDM) |
| India | Smarinita Shetty, Co-founder and CEO | India Development Review (IDR) |
| India | Sujatha Srinivasan, Senior Research Manager - Infrastructure & Governance | Institute for Financial Management and Research (IFMR) |
| India | Sathyasree, Director - Development Support | CRY |
| India | Urvashi Deividayal, Sankalp India Lead | Sankalp, Intellectap |
| India | Venkat Krishnan, Principal Trustee | India Welfare Trust (Founder, GiveIndia) |
| India | Vidya Shah, CEO | EdelGive Foundation |
| Kenya | Evans Okinyi, CEO | East Africa Philanthropy Network (EAPN) |
| Kenya | Janet Mawiyoo, Executive Director | Kenya Community Development Foundation (KCDF) |
| Russia | Maria Chertok, Director | CAF Russia |
| Russia | Oksana Oracheva, General Director | The Vladimir Potanin Foundation |
| Russia | Roman Sklotskiy, Director | Center for Philanthropy Development, The Vladimir Potanin Foundation |
| South Africa | Bhekinkosi Moyo, Director and Adjunct Professor | Africa Centre for Philanthropy and Social Investment (ACPSI), WITS Business School |
| South Africa | Shaun Samuels, Executive Director | SGS Consulting |
| Tanzania | Stigmata Tenga, Executive Director | Africa Philanthropy Network (APN) |
| USA | Chris Cardona, Program Officer for Philanthropy | Ford Foundation |
| USA | Nick Deychakiwsky, Program Officer | C.S. Mott Foundation |
| USA | Teri Behrens, Executive Director | Dorothy A. Johnson Center for Philanthropy at Grand Valley State University |

Annexure 2

One-on-one consultations with experts about the country cases

| Country/ Region | Respondent name and designation | Organisation |
|--------------------|---|---|
| India | Amrut Joshi, Founder | GameChangers Law |
| India | Anil Kumar Reddy, CEO and Co-founder | DonateKart |
| India | Anita Kumar, Head - CSR | Sattva Consulting |
| India | Bindi Daria, Deputy Director | Centre for Social Impact and Philanthropy (CSIP), Ashoka University |
| India | Gautam John, Director of Strategy | Rohini Nilekani Philanthropies |
| India | Harsh Jaitli, CEO | Vani |
| India | Ingrid Srinath, Director | Centre for Social Impact and Philanthropy (CSIP), Ashoka University |
| India | Kashyap Shah, Principal and India Education Lead | Bridespan |
| India | Kavita Mathew, India Partnerships Consultant | Global Giving |
| India | Komal Goyal, Assistant Manager | A.T.E Chandra Foundation |
| India | Kunal Verma, Managing Director | Centre for Fundraising |
| India | Lakshmanan A G, Head of Non-profit partnerships and Online Giving | GiveIndia |
| India | Meenakshi Batra, CEO | CAF |
| India | Megha Jain, Associate Director - Strategic Philanthropy | DASRA |
| India | Noshir Dadrawala, Chief Executive | Centre For Advancement of Philanthropy |
| India | Paul Basil, Founder and CEO | Villgro |
| India | Pearl Tiwari, President (CSR & Sustainability) | Ambuja Cement Foundation |
| India | Poonam Choksi, Social Sector Capacity Building | A.T.E Chandra Foundation |
| India | Priya Naik, Founder and CEO | Samhita |
| India | Pushpa Aman Singh, CEO | Guidestar India/GivingTuesday |
| India | Rathish Balakrishnan, Co-founder & Managing Partner | Sattva Consulting |
| India | Ravi Sreedharan, Founder | Indian School of Development Management (ISDM) |
| India | Sathyasree, Director - Development Support | CRY |
| India | Shalabh Sahai, Co-founder & Director | iVolunteer |
| India | Smarinita Shetty, Co-founder and CEO | India Development Review |
| India | Sujatha Srinivasan, Senior Research Manager - Infrastructure & Governance | Institute for Financial Management and Research (IFMR) LEAD |
| India | Swapnil Agarwal, Co-founder & Director | Dhwani RIS |

| Country/ Region | Respondent name and designation | Organisation |
|--------------------|---|--|
| India | Urvashi Deividayal, Sankalp India Lead | Sankalp, Intellectap |
| India | Venkat Krishnan, Principal Trustee | India Welfare Trust (Founder, GiveIndia) |
| India | Vidya Shah, CEO | EdelGive Foundation |
| India | Swapnil Agarwal, Co-founder & Director | CSF |
| Kenya | Arif Neki, National Coordinator for SDGPP and former Regional CEO, AKF | SDGPP, Aga Khan Foundation |
| Kenya | Chilande Warrande, Program Manager | Viwango |
| Kenya | Clement Nganga, Program Officer | Allavida Kenya |
| Kenya | Cynthia Onyango, Program Officer | Aga Khan Foundation (East Africa) |
| Kenya | Evans Okinyi, CEO | East Africa Philanthropy Network (EAPN) |
| Kenya | Hannah Ahere, Personal Assistant to the Regional Director | Ford Foundation |
| Kenya | James Gatere, Director | I&M Bank Foundation |
| Kenya | Janet Mawiyoo, Executive Director | Kenya Community Development Foundation (KCDF) |
| Kenya | Lucy Chepchumba, Co-Founder | Good Kenyan |
| Kenya | Melvin Chibole, Director, Governance, learning and Communication | Kenya Community Development Foundation (KCDF) |
| Kenya | Nancy Kairo, Executive Director East Africa Region | Africa Venture Philanthropy Alliance (AVPA) |
| Kenya | Nzilani Muema, Program Manager - Kenya | Amani Institute |
| Kenya | Tom Olila, Director | Strategic Connections |
| Kenya | Virgile Bahujihimigo, Program Officer | Segal Family Foundation |
| Russia | Alena Meshkova, Director | Konstantin Khabensky Charity Foundation |
| Russia | Alexandra Babkina, Social Projects Director, Mail.Ru Group; Head of the Dobro.mail.ru service | Dobro.mail.ru |
| Russia | Alexandra Boldyreva, Executive Director | Russian Donors' Forum |
| Russia | Anna Bitova, Head of the Management Board | Center for Curative Pedagogics |
| Russia | Anna Orlova, Board Chairperson | NGO Development Centre |
| Russia | Ekaterina Khaletskaya, Co-founder and Director | Impact Hub Moscow |
| Russia | Elena Ivanitskaya, Deputy Head of the Department for Strategic Development and Innovations | Ministry of Economic Development of the Russian Federation |
| Russia | Elena Malitskaya, President | The Siberian Civic Initiatives Support Center |
| Russia | Igor Sobolev, Advisor to the General Director | Presidential Grants Foundation |
| Russia | Maria Chertok, Director | CAF Russia |
| Russia | Maria Morozova, General Director | Elena & Gennady Timchenko Foundation |
| Russia | Marina Mikhailova, Director | "Garant" Center for Social Technologies (Arkhangelsk) |
| Russia | Oksana Oracheva, General Director | The Vladimir Potanin Foundation |
| Russia | Oksana Razumova, Chairperson | The "Druzya" (Friends) Foundation |
| Russia | Olga Drozdova, Head of Social Projects and Programs | Agency for Social Information |
| Russia | Roman Sklotskiy, Director | Center for Philanthropy Development, The Vladimir Potanin Foundation |
| Russia | Svetlana Ivchenko, Director of Social Policy Department | Norilsk Nickel |
| South Africa | Bhekinkosi Moyo, Managing Director | Africa Centre for Philanthropy and Social Investment (ACPSI), WITS Business School |
| South Africa | Shaun Samuels, Executive Director | SGS Consulting |
| Tanzania | Stigmata Tenga, Executive Director | Africa Philanthropy Network (APN) |

About WINGS

WINGS is a network of 180+ philanthropy associations, networks, academic institutions, support organisations, and funders, in 58 countries around the world whose purpose is to strengthen, promote and provide leadership on the development of philanthropy and social investment in order to promote and develop philanthropy and contribute to a more effective and diverse civil society.

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About Sattva

Sattva is a social impact strategy consulting and implementation firm. Sattva works closely at the intersection of business and impact, with multiple stakeholders including non-profits, social enterprises, corporations and the social investing ecosystem.

Sattva works on the ground in India, Africa and South Asia and engages with leading organisations across the globe through services in strategic advisory, realising operational outcomes, CSR, knowledge, assessments, and co-creation of sustainable models. Sattva works to realise inclusive development goals across themes in emerging markets including education, skill development and livelihoods, healthcare and sanitation, digital and financial inclusion, energy access and environment, among others. Sattva has offices in Bangalore, Mumbai and Delhi.

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