



W I N G S  
ELEVATING PHILANTHROPY

# The 10 Things You Need to Know about Acting Together to Lift Up Philanthropy



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## One-minute summary

This research shows how philanthropy support organisations (PSOs) contribute to long-term social change by examining their purposes, functions, and impact.

While the full research report is long, we have prepared this ‘sneak peek’, so that you can see the main takeaways easily.

The research shows how to build a robust philanthropy support ecosystem (PSE) to unlock the potential of philanthropy. It uses a suite of tools and approaches adaptable to different countries. Results will enable domestic foundations and donors, existing PSO leaders and other stakeholders to build the ecosystem they want.

## Five-minute summary

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The philanthropy support ecosystem (PSE) is defined as ‘a community of interacting organisations and activities that assist and enable philanthropy to realise its potential’. To understand its structure, main functions, and how to enhance its efficiency and effectiveness, our sneak peek is structured around four topics:

### 1. To speak plainly

It is vital to be clear about the terms used. Many words in philanthropy have imprecise meanings that lead to different understandings. In this study, we seek to build a standard terminology of PSE terms and PSO organisations so that findings may be intelligible, both within the PSE and outside it.

### 2. From theory to practice

This study details the history, size, and scope of the PSE in three countries: India, Kenya, and Russia. Taking account of each country’s context, the study assesses the impact of the PSE, using the criteria of the 4Cs (Capacity, Capability, Connection, and Credibility). This leads to an assessment of what is working well and what is working not so well, thus enabling recommendations for action based on empirical data.

### 3. Mapping the ecosystem

A four-stage process is suggested to map the PSE.

1. Develop a team of people to undertake the work and to set objectives.
2. Adapt the method to local circumstances by assembling key reports and talking to people with a good knowledge of the sector.
3. Map the organisations and functions of the PSE and assess the relationships between them.
4. Develop the vision for the PSE and decide on practical measures on how to pursue it.

### 4. Measuring and strengthening the ecosystem

Measuring the added value of the PSE is an integral feature of strengthening it. Measurement involves using five-point scales to assess the attainment of the 4Cs – capacity, capability, connection, and credibility. A variety of statistical methods are suggested to accomplish this. Results will enable people to decide what action to take to enhance the PSE in their country.

Each study shows how the PSE has evolved organically over time. In each case, we can see the emergence of a complex system that, while delivering significant added value to the field of philanthropy, is unplanned, which leads to both duplication and gaps. A systematic review undertaken in each of the countries would be the baseline for a more methodical approach to planning the PSE.

This research is a call to #LiftUpPhilanthropy. WINGS will support the process of rolling out this guidance, by offering advice to WINGS members on how to address some of the issues arising from this work. We will monitor progress, learn from operations on the ground and amend the guidance in the light of experience. Our ability to do this relies on the interest of key actors to build a strong PSE and elevate philanthropy worldwide.

## 10 essential questions on how to #LiftUpPhilanthropy

- 1 [How to name organisations involved in the PSE?](#)
- 2 [How can a taxonomy accommodate language and cultural variations?](#)
- 3 [How can this taxonomy evolve in parallel with the PSE to stay relevant?](#)
- 4 [How can this taxonomy be meaningfully applied in daily work?](#)
- 5 [Why is it important to map the PSE?](#)
- 6 [What is the process to map the PSE?](#)
- 7 [What are the key questions to ask the participants of a PSE mapping process?](#)
- 8 [What are the main steps, tools, and methods to answer these questions?](#)
- 9 [How to assess the strengths of the PSE?](#)
- 10 [What are the main learnings from the three impact case studies?](#)

### 1. How to name organisations involved in the PSE?

*“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

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 tend to fall into three large buckets: PSOs that focus solely on philanthropy, organisations that enable philanthropy as a subset of their main functions, and funders of the support ecosystem.

Organisations in each of the three buckets are listed as follows:

#### A. PSOs that focus solely 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 and collectives
- 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

## B. 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

## C. Funders of the support ecosystem

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

The taxonomy section of the #LiftUpPhilanthropy research categorises and describes PSOs in each of these buckets according to the entity focus they see themselves in, for example, ‘network’, ‘think-tank’, or ‘consulting firm’.

This taxonomy does not intend to impose one classification system or language across regions. It is intended as a starting point to bring out global similarities and regional variations. It will be strengthened by debate and application.

## 2. How can a taxonomy accommodate language and cultural 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. However, the

*“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 the moment of translation.”*

— Maria Chertok, CAF Russia

### 3. How can this 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.

*“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 variety of functions.”*

— Oksana Oracheva, Vladimir Potanin Foundation

### 4. How can this taxonomy be meaningfully applied in daily work?

Taxonomies can sometimes appear as jargon that does not work in everyday situations. This research effort has attempted to address this concern through multiple consultations with practitioners in different countries, though inevitably 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, KCDF

### 5. Why is it important to map the PSE?

Mapping the ecosystem is a necessary preparation for strengthening it, by showing key relationships and assessing its strengths and weaknesses. Mapping will identify gaps in provision, roadblocks to development and will generate insights about how challenges could be met. However, it is important to highlight that this is part of a more comprehensive process, described in detail in our full report.

<b>OBJECTIVE</b>	To undertake the mapping of the PSOs and other PSE stakeholders in a country, identifying strengths and weaknesses
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<b>EXPECTED OUTPUTS</b>	Publicly available mapping of the PSE of a country
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<b>KEY PARTICIPANTS</b>	<b>Primary role:</b> PSOs and PSE Stakeholders  <b>Facilitator role:</b> Steering group
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## 6. What is the process to map the PSE?

### The four stages of mapping the philanthropy support ecosystem

1



#### Select a team and set goals and intended outcomes

Design workshops with core team and experts to establish objectives, outcomes and participants of the mapping

2



#### Adapt guidance to local context

Desk research and participatory workshops with core team and experts to understand the current state of philanthropy, existing gaps and adaptations to mapping tools

3



#### Map the PSE

1. Launch meeting to present the study to PSOs and PSE stakeholders and define a collective vision for philanthropy
2. Co-creation workshop to share the live map with PSOs and PSE stakeholders to identify key actors and missing actors, strengths and gaps in the ecosystem

4



#### Develop next steps to strengthen PSE

Co-creation workshop with PSOs emerging as key actors from the mapping process to identify priority action areas and define a collective vision and roadmap for a strong PSE

#### **Suggested participatory tools for mapping the PSE and defining a collective vision for philanthropy:**

1. Participatory Social Network Analysis to generate a social network mapping
2. Co-creation workshops to assess the social network map and identify key actors and missing players
3. World Café format workshops to identify gaps and strengths
4. Scenarios and brainstorm workshops to identify potential solutions or roadblocks

## 7. What are the key questions to ask the participants of a PSE mapping process?

### 1. What is the current state of the PSE?



#### *Suggestions and tips:*

Break this question into sub-questions:

- a. How would we describe philanthropy in the country?
  - b. What are the gaps in philanthropy?
  - c. How can we fill those gaps?
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### 2. What are the various entity types through which PSOs operate?



#### *Suggestions and tips:*

Check the entity type from the categories, as listed in the adapted taxonomy.

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### 3. Which PSE stakeholders do these PSOs serve?



#### *Suggestions and tips:*

Ideally, PSE stakeholders could include:

- **Funders:** high net-worth individuals, corporate donors, family foundations, community philanthropy organisations, international funders/corporate agencies, NGOs (international and domestic).
- 

### 4. Which PSE stakeholders do these PSOs engage with?



#### *Suggestions and tips:*

Ideally, PSE stakeholders could include:

- **Funders**
  - **Government:** policy makers and implementation agencies, and
  - **Civil society/umbrella NGOs** that could contribute to building a picture from a 'beneficiary' perspective.
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### 5. What are the other PSOs that support organisations could collaborate with and what is the nature and frequency of collaboration?



#### *Suggestions and tips:*

Check the PSO types from the adapted taxonomy.

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### 6. What functions do PSOs perform? Which are the dominant (top 5-10) ones?



#### *Suggestions and tips:*

Check the functions from those listed in the adapted taxonomy.

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### 7. How important and frequent are these functions to PSE stakeholders?



#### *Suggestions and tips:*

For rating the importance of PSO functions among clients, the following classification is suggested. Clients are asked which of the following categories best fits their view:

- Functions that are central to your success so far,
- Functions that are important but not central,
- Functions that are fairly useful, or
- Functions that are not useful/not relevant.

For rating the frequency of engaging PSO functions, the following scales are suggested. Clients are asked which of the following categories best fit their view:

- Engaged at least once a month,
- Engaged once a quarter,
- Engaged once a year, or
- Not engaged.

The respondents are to examine the list of functions attached in the Annexure of the full report and rank them, based on the suggested scales.

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## 8. What values or types of assets do PSOs create for PSE stakeholders?

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## 9. What is the geographical distribution of the network of PSOs? Are areas outside the capital and large cities well-served?

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## 10. How does the current ecosystem serve different forms of philanthropy?

## 8. What are the main steps, tools and methods to answer these questions?



### Step 1

Online or in-person launch meeting to start mapping and define a vision for philanthropy



### Step 2

Build a questionnaire



### Step 3

Implement the questionnaires through a mix of online and offline methods



### Step 4

Feed data into a social network analysis software



### Step 5

Co-creation workshop to share the live map with key players



### Step 6

Update the live map



### Step 7

Analyse additional data collected in the questionnaire

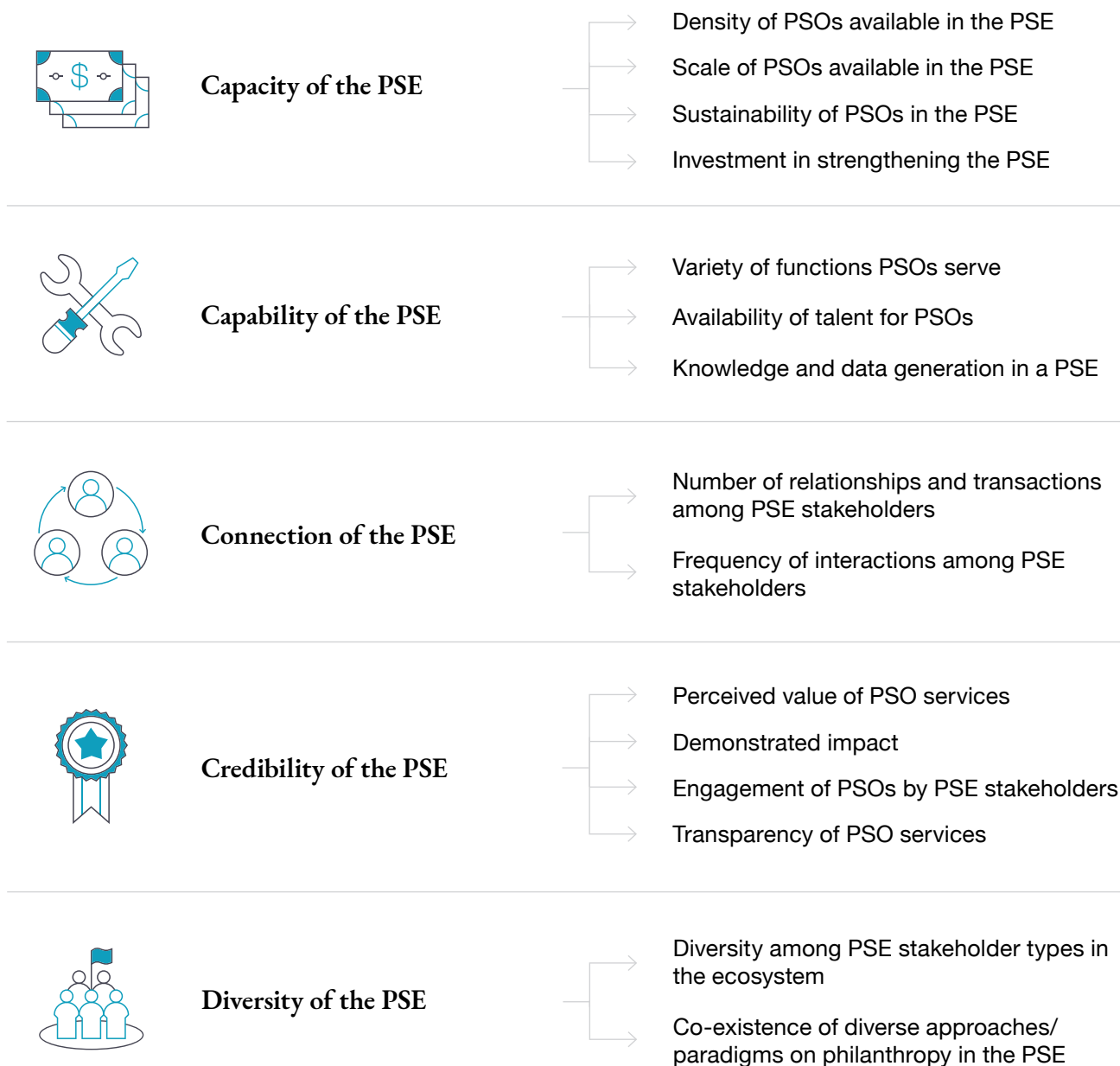


### Step 8

Publish the document and share it with WINGS

## 9. How to assess the strengths of the PSE?

The type of metrics proposed consists of five key result areas: the perceived capacity, capability, connection, credibility and diversity of the PSE. Each of these key result areas is further broken down into a set of indicators as indicated by the figure below.



*“It’s very useful to understand that the final score for each country could be the same, but their situations are different. Looking at specifics is more important than giving scores...sometimes it’s important to count, but here it’s more about understanding details.”*

– Maria Chertok, CAF Russia

Besides these indicators, in Part 6 of our [full report](#) or in the document “How to Assess the Strengths of the Philanthropy Support Ecosystem”, you will find a set of sub-indicators and a scoring framework to assist you in framing your description, including instructions on how to score each of them. As noted earlier, this is a first trial of what we intend to be a developing method. In order to develop it further, it would be helpful if you could also note how relevant you believe the indicators are (i.e. ‘not relevant’, ‘somewhat relevant’, or ‘very relevant’) to assess the strengths and weaknesses of a PSE and share the information with WINGS at [info@wingsweb.org](mailto:info@wingsweb.org).

## 10. What are the main learnings we can take from the three impact case studies?

Some common challenges identified were re-imagining the role of PSOs in a post-COVID world, measuring and attribution of PSO impact, and diversifying the impact of PSOs across remote regions and smaller stakeholders. Attention to these areas could help to increase the impact of PSOs in India, Kenya and Russia. In terms of achievements, PSOs have improved in each of these countries in their capacity, capability, connection or credibility. It is clear that investments in PSOs have contributed to these improvements. Although it is not always possible to draw a straight line between PSOs' work and specific improvements at an ecosystem level, investment in PSOs appears to have aligned with areas of improvement in philanthropy and, conversely, areas that have seen little investment in PSOs align with deficiencies in philanthropy.

Now it is your turn to make the questions and reach out to us about your ideas on how to #LiftUpPhilanthropy in your own context. You are strongly encouraged to share feedback and recommendations to strengthen its efficacy and relevance of these tools in local contexts. You can reach out to us anytime at [info@wingsweb.org](mailto:info@wingsweb.org).

Check out our full report and the dedicated sections on the PSE mapping methodology, metrics to assess the PSE, and impact cases for more information.



Photo by Agnieszka Ziomek

## 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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