
UNDERSTANDING THE RE-GRANTING ECOSYSTEM IN THE GLOBAL SOUTH

ENVIRONMENT, GENDER,
SOCIAL JUSTICE & HUMAN
RIGHTS IN ASIA, LATIN
AMERICA AND THE CARIBBEAN

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MAY 2024

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FROM:

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With this report, we are excited to deepen the conversation on the roles of intermediaries, networks, regranters and other organisations in the Global South as potential actors that can contribute to the creation of a more respectful, caring, and sensitive funding ecosystems. **This report draws on the invaluable insights of +90 philanthropic practitioners and societal leaders from across Asia, Latin America and the Caribbean who engaged with us in interviews, conversations, and two learning series.** We are very grateful for these exchanges, and committed to faithfully transmit the different voices and hopes we heard throughout this process.

Carried out in partnership with Oak Foundation, this study is a conversation starter. We share what we are learning so far to invite you into this complex exploration. **If you are interested in getting involved with a community of practice to develop capacities and exchange knowledge on the role of Global South intermediaries, contact us via the webpage www.philanthropydialogues.org.**

We look forward to holding further conversations, weaving connections and actions, and building a stronger, more just funding ecosystem.

This report is shared in four parts:

Part 1.

Executive Summary, Major Findings, Recommendations, Horizons of Change, Methodology & Glossary.

Part 2.

Regional Trends, New Framework of Qualities to Assess Partners and Self-Assessment Tool for Intermediaries.

Part 3.

Voices from practice. Report from Learning Series.

Part 4.

Demonstrated Cases of Partners, Intermediaries, Networks and Organisations and findings from piloting a self-assessment tool.

Annex

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PART 1

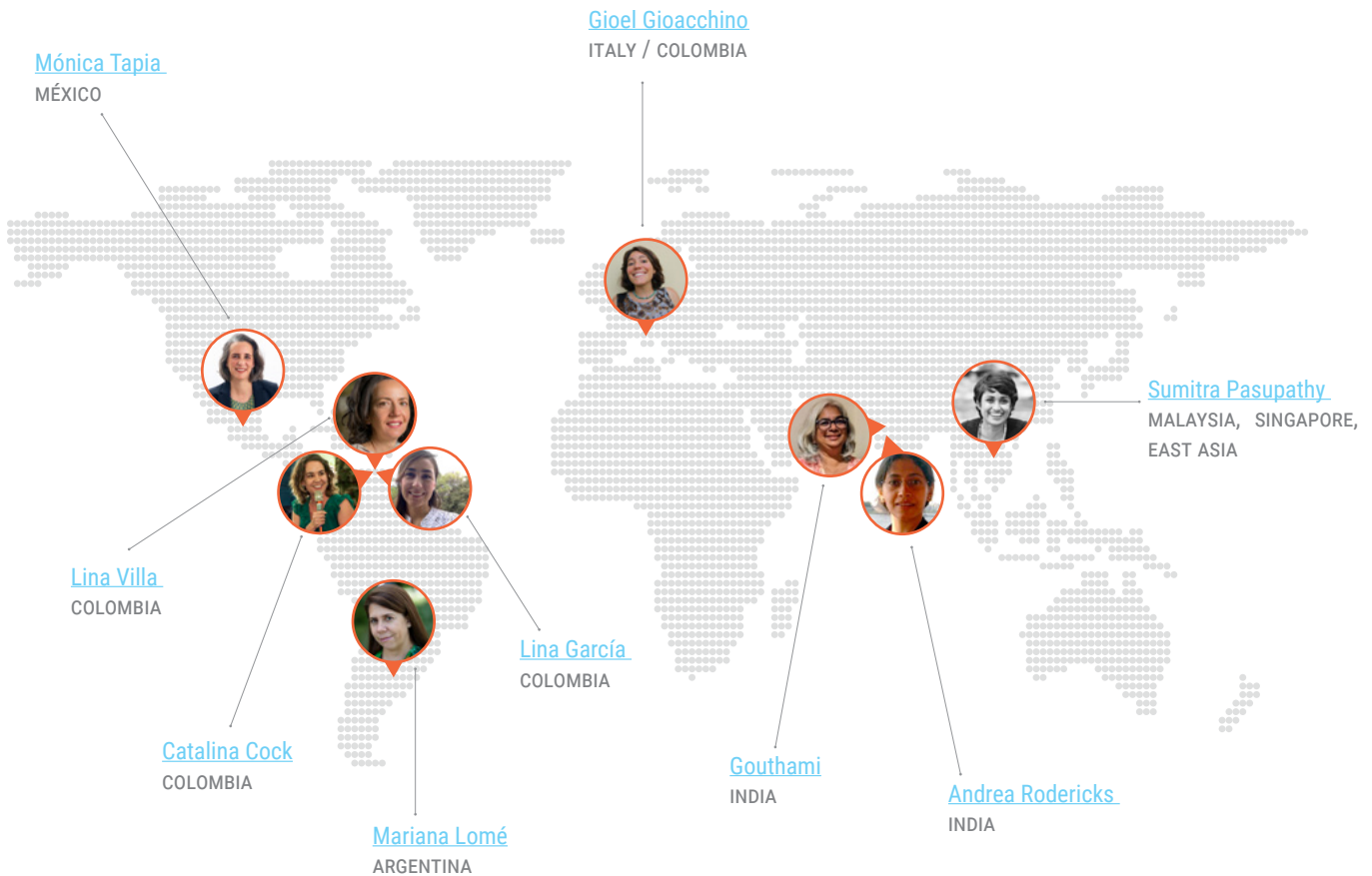


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ABOUT US



We are a team of women from across Latin America and Asia, committed to supporting a lively and healthy civil society - we each bring 10-25 years of experience founding, leading, and supporting grassroots civil society organisations and networks. We spend the last decade carrying out participatory research and advising philanthropic institutions in both the Global North and South.



[MORE ABOUT THE AUTHORS](#)

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EXECUTIVE SUMMARY

1.1 INTRODUCTION

This study takes the temperature and discusses the transformation of philanthropy in Latin America/ the Caribbean and Asia. Funded by Oak Foundation, it marks a moment of profound introspection and inquiry within the philanthropic sector. The study identified a list of **potential intermediaries in the Global South with readiness to build capacities and distribute funds to grassroots and citizen sector organisations** with more agility, cultural awareness, and respect for local knowledge and needs.

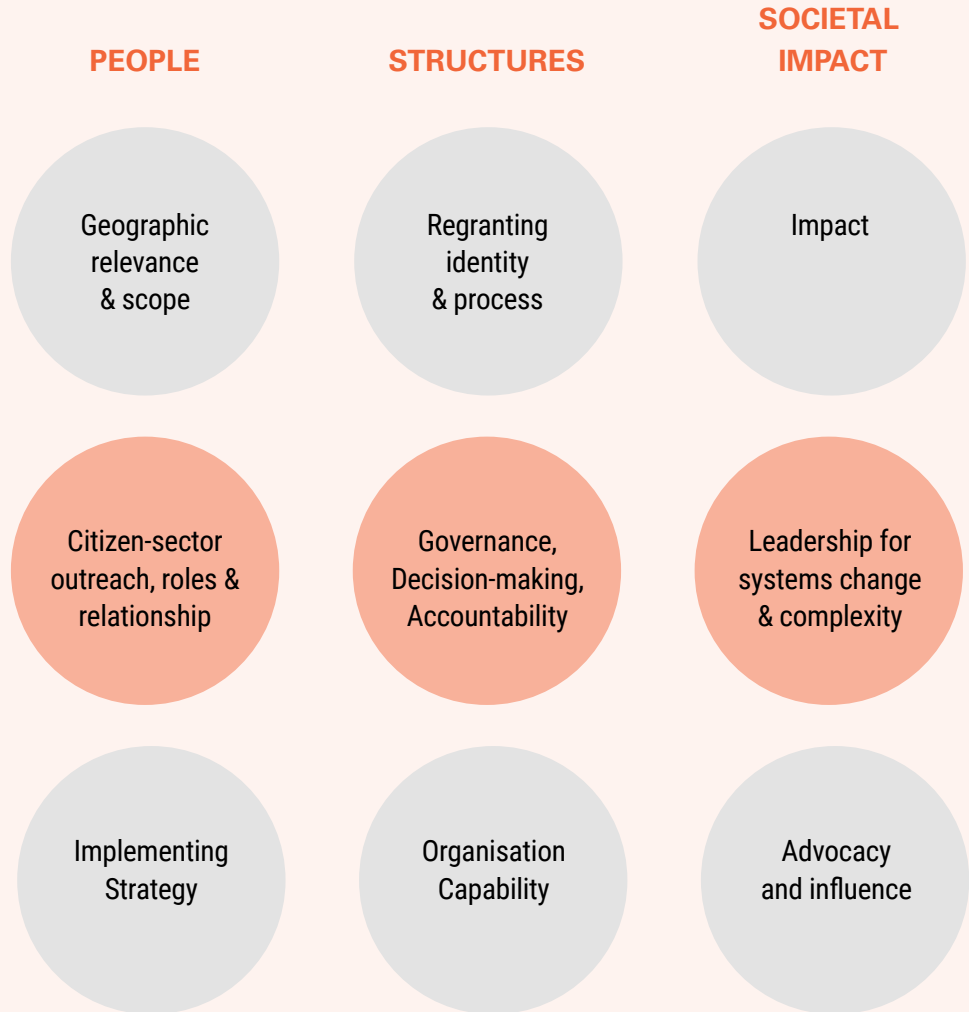
Informed by over 90 interviews with relevant actors in the field and two Learning Series, this study attempts **to understand emerging philanthropic ecosystems** - It provides insights on current dynamics, cultures, and attitudes, and zooms into the role of 'intermediary' organisations. Based on emerging trends in the funders' systems, globally and domestically, this study **starts to map out the roles that intermediaries can play in the system to support civil society organisations and grassroots communities.**

To provide more inspiration for the development of this field, the study outlines **promising practices undertaken by existing intermediaries and community regranters.** It presents **9 qualities**¹ that intermediaries can embody to be effective by developing more transparent, proximate, and equitable relationships with both funders and grassroots/citizen sector partners.

¹ See Part 2 of the Report for a complete description of these 9 qualities.

9 QUALITIES

as a framework



At the core of these 9 qualities, we highlight “Proximity to grassroots and community centric”, “Decision making and governance structures” and “The Systemic leadership qualities”. The study concludes with some concrete recommendations to Oak Foundation and other funders - we present these recommendations through actionable steps and a staged approach.

In this study, we use the term ‘intermediary’ or ‘regrantor’ to refer to organisations which direct funds towards civil society organisations through a **regranting process**. We enclose the terms ‘intermediaries’ and ‘re-granters’ in single quotes because these concepts come **charged with power dynamics**.

In **Asia**, the terms are relatively **new**, and **regranting is emerging quietly and discreetly** due to security reasons, especially in countries

with restrictive regulatory environments; in other words, the terms come with political implications.

In **Latin America and the Caribbean**, many are willing to adopt the terms, but the critique is that they **reduce Southern organisations to go-betweens, putting in the shade their agency to add value**. They are **not merely grant administrators**, but propose new perspectives on problems, strategies, processes; they **innovate and shape agendas**.

1.2 MAJOR FINDINGS

A snapshot view of the funders' system

Addressing the challenges faced by civil society across **Latin America, the Caribbean, and the Asia** region **cannot be simply solved by channelling funds directly to and by organisations** in the region. Location or place-based strategies do not automatically suggest proximity to civil society. Philanthropic systems are faced with the opportunity to not only change funding practices, but also **revolutionise the underlying narratives** that justify them, while paying increasing attention to the **redistribution of power in decision-making**.

Philanthropy needs to be able to support civil society to prepare for **the challenges of an evolving world marked by climate and environmental change, societal polarisation, geopolitical tensions, ageing populations, and economic volatility**. In this dynamic landscape, and **as civic space is shrinking, there is an urgency for funding practices** and fund flows that are flexible, and that **innovate better and faster**.

In the three regions, we observed **an increasingly “squished” civil society space**. In several countries, national governments have introduced additional

regulatory mechanisms to oversee civil society groups. Anti-money-laundering provisions have led to the imposition of regulatory restrictions on the cross-border flow of philanthropic funds. Moreover, despite the growth of corporate foundations as a significant funding source, their approach to problem-solving often leans toward a **“techno-managerial” perspective, with a predilection for direct social service delivery and potentially steering away from systemic change and “controversial” issues (such as gender, human rights, and environmental justice)** (See Part 2 of the Report).

Instead, there is an urgency for new types of relationships in philanthropy that account for much needed intersectionality between different issues. We found concrete evidence of an **opportunity to foster increased community and grassroots participation in funding systems, serving as a catalyst for innovation and impact**. More appropriate, realistic giving can strengthen the many smaller organisations that accompany communities with respect, sensitivity, and care. **We also found the intersectionality approach to climate and social justice widely welcomed, with the gender field demonstrating interest to explore further.**

So, what is **the role of national and regional ‘intermediaries’ or ‘re-granters’** to address these challenges? They have been recognized for:

- Offering increased flexibility, local expertise, and effective allocation of funds.
- Serving as bridges to manage complexities within diverse national and regional backgrounds.
- Inviting broader terminology, language, and narratives around the role of ‘intermediaries’ and ‘regranters’, way beyond bridging funds and development agendas.²
- Playing a broader role as “convenors”; “campaigners”; “financial/ technical experts” and more.

Across the regions, some interesting innovations are occurring, with Latin America leading the trend of coming together in tighter networks and strengthening lateral connections among grassroots organisations. Below we present some promising practices which show the way forward, providing optimism and inspiration for this emerging field.

² See Part 2 of the Report for a comprehensive list of roles.

1.3 THE PROMISING PRACTICES THAT ARE EMERGING AMONGST INTERMEDIARIES IN THE GLOBAL SOUTH

The study identified a healthy ecosystem of more than a hundred organisations in both regions that can have a significant role to play in this emerging context.³ Our work zoomed in into 55 organisations that are shifting practices. Those appreciated for their close ties to local communities implement a combination of the following promising practices:

1 Proactively recruit, hire and train diverse and social justice-oriented local leaders as board members and decision-making staff. They engage people who understand the context and their complexities, advise on strategy, create intimate ties with civil society, increase their legitimacy and, therefore, integrate a more systemic perspective. The impact of **individuals connected to the grassroots** is particularly enhanced when **diversity is present in advisory boards and governance bodies**, and amongst the staff who define strategic directions.

An example of an organisation which hires key collaborators that are deeply connected to the grassroots is [Fondo Semillas](#), a Mexican feminist fund recognized for its transformative power and support to organised women. In Semillas, those who set and guide strategies, as well as disseminate public calls, are feminist activists, academics, and grassroots leaders. [Global Greengrants](#) is another example of an organisation that engages local advisers and partnerships to accompany grantees, therefore reaching out to grassroots communities while working on a global scale. They also are deeply involved in recommending and guiding grantees through the application processes⁴.

2 Understand the legal and fiscal barriers and how to work within them. As civic space shrinks and **governments become more restrictive to civil society**, it is important for intermediaries to know **how to reach out to grassroots and non-legally incorporated groups** who make significant contributions to the social change ecosystem.

An example of a fund learning how to navigate legal frameworks is [Hispanics in Philanthropy \(HIP\)](#), a network of philanthropists, funders, nonprofits, impact investors, and movement leaders working across the United States, Latin America, and the Caribbean. Using a strong knowledge

³ Within the scope of this report funded by Oak Foundation we arrived to a selection of exemplary cases of key actors that demonstrate that several citizen centric organisations/networks not only exist with ambition for broader role or impact but in alliance with their partner donors are shifting practices and experimenting with new ways of redistributing funds. However, this list is non-exhaustive, and is indicative only given the initial scope of the study. See it on Part 4 of this Report.

⁴ Both Fondo Semillas and Global Greengrants are current grantees of Oak Foundation.

of legal frameworks, they have developed a **due diligence system that is trust-based and relevant to the local-context, to channel funds and in-kind donations across borders**, including to Cuba, Venezuela, and Nicaragua.⁵

3 Manage financial complexity for fundraising, regranting and overheads costs. Many emerging progressive ‘intermediaries’ are learning how to **break-up large grants, dispersing them into smaller quantities and managing them in a timely manner**. This involves effective partnerships and **aligning grants with the communities’ different needs and time commitments**. [AMAN \(Alliansi Masyarakat AdatNusantara\)](#) partners and receives funds from the domestic Nusantara Fund (Ford Foundation Indonesia which is a close ally) and Skoll Foundation. [AMAN](#) has developed new ways of distributing funds into smaller tranches in a manner that reflects the culture and practice of indigenous communities in the region, as well as the greater region of Nusantara.

4 Develop and experiment with innovative granting procedures. Effective intermediaries improve grantmaking procedures through **public calls, participatory grant making, context based due diligence, trust-mechanisms, and deliberative processes** to select grantees and assign grants. At [Semillas](#), for example, grantmaking decisions are made through participatory deliberations among the final selection of prospective partners. Since its inception in 2017, [Resolve Foundation](#) has been exploring in great length with participatory grantmaking and they continue to deepen and evolve their processes providing small grants to domestic organisations in Hong Kong.

5 Convene and connect small grantee partners. Grassroots partners value intermediaries who invest time and resources in **cultivating deeper relationships of mutual support**. This might include investing in platforms for **collective problem solving, strengthening the capacities and resiliency of their partners with local capacity building providers, shared understanding of regulatory frameworks and compliance, or growing project management skills**. The [National Foundation for India](#) and the [National Campaign on Dalit Human Rights](#) work with small organisations in some of the remotest parts of Asia - they build capacities and provide complementary support such as organisational mentorship. The [Samdhana Institute](#) relies on a network of allies in the Philippines and the region that have legal and fiscal oversight, with native board members that are active in climate justice. As an ‘intermediary’ in frontline environmental defending, they have devolved decision-making processes

⁵Hispanics in Philanthropy (HIP) is a current grantee of Oak Foundation.

throughout their organisation. [Global Greengrants](#) incubated [Samdhana](#) and therefore played a significant role in this process; they provided capacity strengthening and supported Samdhana developing wider regional connections. Another example of institutions providing support with networking and alliance-building is the [Alianza Socioambiental Fondos del Sur](#) (Socio-Environmental Alliance Funds of the South), which has recently convened a group of regranting national funds on socio-environmental justice in Latin America, Mozambique, and South-east Asia.

6 Ensure organisation resilience, sustainability and mission by expanding and diversifying their network of donors. To gain local legitimacy, show transparency and attract more donors, progressive ‘intermediaries’ carry out **monitoring and evaluation studies, invest in impact assessment, and value action research and learning processes.** They produce annual reports and are transparent about their funds and results. For example, [Yayasan Kurawal](#), a ‘regranting’ organisation that invests in leadership, capacity building, and economic empowerment in Indonesia, **actively convenes donors and regranters**, including Tara Climate Foundation, to increase awareness on the shrinking space in climate justice. They aspire to expand their work and approach across South-east Asia. The [Asian-Pacific Research and Resource Centre for Women \(ARROW\)](#), with their extensive network in the Global South, are both drawing in funders and aiming to be at the intersection of sexual reproductive health and climate in 15 countries. This followed their pioneering global study on the effects of climate change on women and girls.

7 Incubate intermediaries in other regions and thematic areas. Through effective partnership, ‘intermediaries’ complement each other’s impact. The [Mexican Fund for Nature Conservation \(FMCN\)](#), a 30 year-old ‘intermediary’ organisation working on conservation, has advised the creation of subnational regional funds in Mexico and the birth and professionalisation of conservation funds across Latin America through the [RedLAC network](#). The RedLAC network is composed of 28 national environmental funds from 18 countries in Latin America.

In 2020, [Women Win](#), a global women’s fund dedicated to advancing girls’ and women’s rights,⁶ was approached by 3 gender field leaders with the desire to create a new ‘intermediary’ focused on the intersection of technology and gender in the Global South. [Women Win](#) actively engaged with the community-centric founders to incubate a new feminist platform known as [Numun Fund](#), which sustains feminist infrastructures for movement organising. As another example, The [Keystone Foundation](#) works on issues

⁶ Women Win is a current grantee of Oak Foundation.

of climate change and the environment through networks across India and globally. Meanwhile, [Pradan](#) focuses on capacity building of grassroots communities and civil society organisations in India. Through transfer of knowledge and expertise, funders can spread their experiences and incubate emerging groups. [Women Win](#), [FRIDA \(Young Feminist Fund\)](#), [Prospera International Network of Women's Funds](#) and [Global Greengrants](#), for example, are regenerating their role by incubating and nurturing newer platforms within their network.

KEY RECOMMENDATIONS AND ROUTES FOR ONGOING LEADERSHIP AND IMPACT

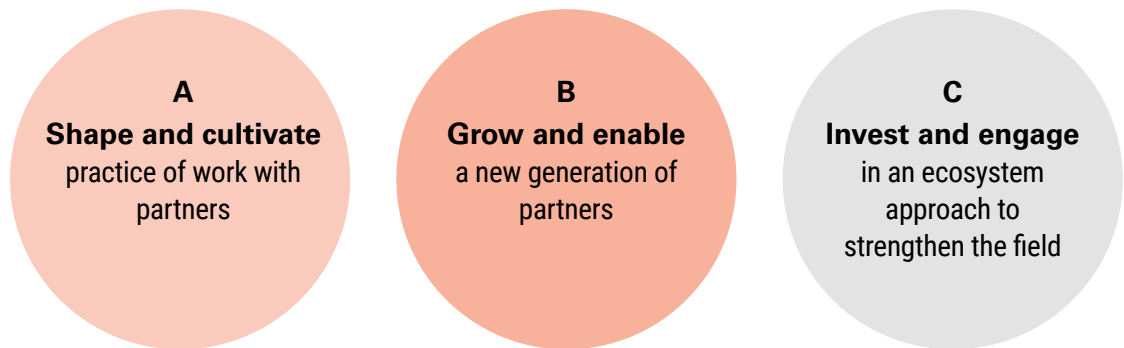
Throughout the study, Oak's leadership role in shaping the field has been widely recognised and acknowledged. This legitimacy represents an opportunity to continue to add substantial value the developmental field for this work, including in the following ways.

- A Shape and cultivate funders practice with partners.** Build on, magnify, and learn **with local communities and organisations** that are experimenting with community-centric approaches. This might include innovations around: co-design, language and terminology, programs, grantees' selection, participatory grantmaking, and incubating sub-regional organisations, national funds and regional networks. Promoting collaborative leadership and other strategic approaches allows for trust building; the intention is to evolve ways of working from service provision to genuine partnerships.
- B Growing and enabling a new generation of intermediaries, with emphasis on constituency-led organisations.** Invest in developing relationships, capabilities, infrastructure, and networks to pave the way for organisations closely connected to communities to act as granters. The emphasis should be on supporting regranteeing funds networks, communities of practice, and constituency-led organisations aspiring to be regrantees. **To enable a new generation of 'intermediaries'**, it is valuable to promote **collaborative leadership development opportunities tailored for Board members, staff, and capacity building partners.** The focus here is on developing key capacities, including relational leadership, complexity/systems

thinking, understanding networks, and acquiring hard skills in management, fundraising and governance.

C Invest and engage in an ecosystem approach to strengthen the field. Rather than relying on one-to-one relationships with intermediaries and work in thematic silos, **invest in greater collaboration across the environmental and climate justice ecosystem to enable funders to better sense the changes that are wanting to emerge** in the philanthropic field. Unusual allies will enrich perspectives, and the attention to power within philanthropic space will enable more awareness about the power dynamics that philanthropy might prefigure and shape. Invest in piloting, experimenting, co-learning, and discovering new leadership models.

RECOMMENDATIONS



Shift language and terminology according to context – make sure it resonates with partners and communities.

In the Learning Series for this study (Part 3), participants found the **term ‘intermediary’ problematic and transactional, not fit for purpose and for the full range of value-added functions that organisations provide.**

In addition, it will be important to explore suitable language around climate and environmental justice that is sensitive to political and business environments.

Other recommended new practices & habits

Pay greater attention to the range of roles that intermediaries play beyond regranting. Take the time to understand the value they add and how they serve context-specific needs. Some examples might include technical assistance for applications, grant management and fiscal sponsorship, and donor diversification roles for smaller organisations (including those that not legally incorporated.)

In engaging intermediaries, prioritise more relational and power shifting qualities around grassroots outreach and relationships. We heard multiple calls from constituency-led organisations to go beyond maxims like “data driven” and “evidence-based programming” to truly understand the social and relational elements of the work from the perspective of grassroots organisations.

Help build **support networks and mechanisms for the protection of frontline environmental, gender and human rights defenders.** Many anticipate the next crackdown will be on organisations and activists in the climate change space.

Due to the complexities they have to deal with, **intermediaries, especially regranters, work at a national scale. The regional scale** is currently being occupied by **networks for national regranters and intermediaries.**

Explore ways to **cultivate connections/ collaboration between regranting intermediaries and grassroots actors across national boundaries.** This also involves documenting practices to overcome barriers for transborder grant making - particularly in countries where the civic and philanthropic space have shrunk.

Experiment and co-learn with philanthropic and regranting pioneers around innovations in grantmaking.

Some emerging innovations that surfaced in this study include:

- The use of advisory councils, investment committees, and other trust-based approaches to grantmaking which involve constituent representation.
- Participatory application, granting and management processes with shared decision-making.
- Provision of long-term flexible funding, including core funding to support organisational development of constituency-led organisations.

- Offering accompaniment and resources for preparation of grant applications.
- Communities of practice in grantmaking.
- Accompanying leadership development processes.
- Piloting the growth of sub-regional funds.

These innovations are already being tried by organisations such as Global Greengrants, Women Win, Numun Fund, Nusantara Fund and Samdhana Institute in Asia, Fondo Semillas, Fondo Mexicano para la Conservación de la Naturaleza, MAR, Casa, FASOL, HIP, Civic House, RACI and others in Latin America. Much can be learned from their experience to inform future practice.

The following roadmap is intended to help funders prioritise their efforts, operationalize recommendations, and build stepping stones for the long-term transformation journey of philanthropy. While these horizons are in some ways connected to short, medium, and long term, they are not necessarily linear. Funders, such as Oak, who have grantees already in this trajectory of change could focus initially on the first horizon while investing some organisational energy in cultivating horizons 2 and 3.

Horizon 1 - short term

Build momentum and experiment

- **Invite organisations from the list of exemplary cases** (Part 4) that responds to funders' needs (in terms of scope and scale) to a pilot an incubation programme for intermediaries.
- As part of the incubation pilot, **fund the development of a Funding Strategy and Plan** where potential partners can design/ strengthen their own schemes (such as theories of change, policies, mechanisms, grantee profiles, grant-making policies, and participatory processes). Include co-design spaces to align with global philanthropy agendas.
- **Support participants to implement their Funding Strategy and Plan.** This could be done through a small grant to learn and adapt. Operationalise this with an open call and participatory process and **invite participants to jointly propose** and be accountable for an overhead fee and rationale.
- As part of the incubation pilot, create **a Community of Practice** to jointly learn about the field and the process, using a set of shared learning questions. Host facilitated conversations, meetings, and articulation of plans, especially including those from current and promising regional networks. Use this Community of Practice to actively promote connections and introductions between similar networks within and across regions and thematic areas. Hire capacity builders/ consultants experienced in facilitating and strengthening these networks.

Other ways to build momentum and experiment:

- Establish **commonly agreed desired overheads** for the short and medium terms.
- Ask for **Development and Capacity building plans**, as well as risk assessments, which could include budgets.
- Convene or promote **facilitated conversations and articulation plans and meetings**, especially from current and promising regional networks.
- Actively **promote connections and introductions** between similar networks in other

regions or in the same region with different themes. Connect capacity builders / consultants experienced in facilitating and strengthening these networks.

- **Understand and ask candid questions about their operating contexts and shrinking conditions in civic space.**
- Invite them to **facilitate conversations of regional and thematic networks.**
- Explore the possibility of **inviting other organisations that have served as fiscal sponsors or temporary regranters to join these conversations.**

Recommendations for Conversations between funders:

- Make sure to keep funding **national professional organisations based in cities of the Global South**. This might include progressive think-tanks, and organisations working on anti-corruption, strategic litigation, gender equality policy, among others. They are playing key roles in civil society, supporting its defence and democratic consolidation. The movement towards funding intermediary organisations **should not ignore or wipe them out from funding strategies.**
- **Share reports and findings, as well as learnings along the process.**

- **Share mapped intermediary organisations, regional networks, and thematic meetings, but have each explore their way forward around them, to prevent crowd-in or crowd-out problems.**

- Explore **global opportunities for civic space defence and civil society consolidation**. These opportunities should be prioritised and led by Global South national actors and coalitions, instead of Global North actors with partners in the South. Anti-laundry conventions, democracy observatories and international rapporteurs are among the examples of global opportunities.

Horizon 2 - medium term

Upscale and incorporate effective innovations

- **Incorporate learnings from pilots** and use them to evolve existing practices (i.e. revisit your own overhead policies, application procedures, monitoring, and terminology used). Include an Institutional Improvement Plan to all 'intermediary' agreements and, when feasible, enable technical assistance.
- **Consolidate a pipeline of potential 'intermediaries'** and conduct one-to-one intimate learning conversations; make sure to have a clear understanding about partners' operating contexts, needs, capacities, and new pathways under the civic space shrinking conditions.
- **Invite intermediaries into a co-creation, co-contributor role to further identify and seed new intermediaries.** Use adaptive, deep listening processes that invite creativity and multiple ways of knowing.
- **Promote and strengthen regional networks of 'intermediary' funds and coalitions,** along with their capacity building and facilitators partners. It is important to follow and manage expectations, according to the pace and rhythm the organisations set up in their strategic plans.
- **Promote the development of executive training and capacity building programs** for and by Global South 'intermediary' organisations. There are partners such as Women Win, Frida, or Samdhana Institute who see an active role in incubating others and are not competing in this field.

Promote existing learning programs and collaborative leadership development opportunities

Among the capacities to develop are:

- **Opportunities for more relational styles of leadership** that seek to work across divides, build trust, balance power, draw on people's personal purpose, and shift mindsets to shape an inclusive philanthropic ecosystem.
- **Complexity and system's approach** to problem solving, inclusion, and policy advocacy.
- Cultivating a **better understanding of networks and how they work** among stakeholders in the philanthropic ecosystem. This includes supporting the development of network weaver capabilities, especially for constituency-led intermediaries. There is also a need to create the space, time, and unrestricted funding support to allow the vision of regional networks to take shape and grow.
- **Management hard skills** such as fundraising, financial sustainability, legal and human resources management, understanding of project cycles, and monitoring, and evaluation.
- **Coaching programs for Executive Directors and Board members** - particularly those from diverse and minority backgrounds.

Include **bilateral peer-to-peer exchanges and sabbatical opportunities with other Global South and Global North partners** for leaders, staff and Board members. These could be focused around learning about grantmaking, financial management, and accountability practices.

Explore and fund existing **regional and global leadership development programs and fellowships** to take on intermediary organisations' leaders and next generations prospects. These programs should emphasise systems/ complexity thinking and awareness, collaborative/ bridge-building leadership vision.

Promote the development of **executive training and capacity building programs for Global South intermediary organisations**. In doing this, regionally articulated hubs and current infrastructure in each region should be assessed, so these programs are context and language relevant. Academic programs in the Global North are to be avoided, as the objective is to strengthen local institutions and capacities in the Global South.

Transit development programs from grantmaking and management towards more **complex skills and profiles, such as endowment creation and management** and grantmaking legal framework regulations.

Invite the **alumni from previous executive training programs and fellowships to codesign new curricula**.

Other ways to upscale and incorporate effective innovations

- **Promote and strengthen regional networks of intermediary funds and coalitions**, along with their capacity building and facilitators partners. It is important **to follow and manage expectations, according to the own pace and rhythm the organisations set up in their strategic plans**. Many of them are still emerging, recruiting staff and Board members, consolidating their national legitimacy and work - the regional scale requires additional work and attention.

- In collaboration with selected Global South organisations, **devise strategies for civic space defence and the consolidation of regional hubs and networks who specialise in legal and fiscal national frameworks, as well as cross border regulations among the Global South countries**. In addition, these strategies should include leadership, advocacy and negotiation skills of coalitions and networks.

Horizon 3 - long term

Accelerate field change through evidence

- Follow-up and evaluate short and medium strategies to strengthen and support 'intermediary' organisations. Identify consolidated actors, network partners and emerging trends.
- In collaboration with selected Global South organisations, devise medium and long-term strategies for civic space defence and civil society consolidation. In particular, it will be key to strengthen regional hubs and networks that specialise in legal and fiscal national frameworks, as well as cross border regulations among the Global South countries.
- Invest in co-learning platforms led by Global South 'intermediary' organisations. This will enable promising organisations and groups to come together to explore and collectively learn from the evolution of the climate justice and philanthropic ecosystem.

Other ways to accelerate field change:

Convene other funders to **shape a narrative of working with constituency-led intermediaries** that actively addresses current tensions in the system. Build **joint advocacy and communications strategies and tools** to shift narrative and language and influence policies.

Follow-up and **evaluate short and medium-term strategies to strengthen and support intermediary organisations**. Consult especially consolidated actors on what worked as well as new emerging trends.

Help create opportunities in the regional ecosystem for **Global South-led innovation, piloting, brave experimentation and learning**. The ecosystem is ripe for this kind of experimentation. Support and resources for it should be easily accessible, allowing for failure, learning, and new innovations to be tested.

Some examples of experimentation include:

- Exploring innovative ways of working to address current 21st century levels of complexity of the field.

- Testing the use of advisory councils and/or investment committees that have representation from constituent led groups across the Global South (to support strategy, field development, and decision-making on grants).
- Creating regional and national spaces/platforms for civil society connections, building resilience and solidarity, and amplifying civil society voice.
- Exploring support networks and other mechanisms for the protection of frontline defenders.
- Mechanisms to simplify the giving process.
- Shifting impact measurement and learning mechanisms to be more constituency driven.

International funders' groups and meetings should consider **and invite the Global South regrating organisations as peers**. The exchange and group learning will benefit both sides.

CONCLUSIONS



In this moment of critical self-examination within the philanthropic sector, we welcome Oak Foundation's investment in scoping and research studies. Our findings emphasise that we need more equality in the philanthropic ecosystem - this can be invited through listening, dialogue, learning, and collaboration. Additional funding needs to be accompanied by co-created agendas rooted in emerging practices. There is a recognized hunger for this transformative engagement and a powerful imagination around different ways of working. **We have identified promising actors as well as practices that can be tested and upscaled.**

There is an invitation for greater leadership in the field of philanthropy: one is leadership within individual philanthropic organisations, the second is leadership within the sector and the third, the most ambitious, is leadership in society. This societal leadership involves setting examples of creative problem-solving and influencing behaviour. To encourage this leadership, it is vital that philanthropic and grassroots leaders are provided with space and support to reflect together on the ways in which they can rise to collective challenges. In our view, Oak Foundation is well positioned to connect an emerging ecosystem of intermediaries by hosting co-learning spaces to reflect on promising practices and the future of philanthropy.

METHODOLOGY OVERVIEW

The research for this work was developed between August and December 2023 through six interrelated phases:

Phase 1: Inception report:

Literature review, peer conversations, co-design of a **Framework of Nine Qualities** to scope potential intermediaries and alignment on scope and geographies with Oak.

Phase 2: Ecosystem mapping:

Desk research on funding landscape analysis of Oak's current intermediaries; 53 semi-structured interviews with actors in the field; and a first list of intermediaries, that demonstrate that citizen-centric organisations/networks exist with ambition for broader role or impact.

Phase 3: Assessing and inviting potential organisations to the learning series:

Designed a Learning Series, considering mitigation strategies for possible sensitivities.

Phase 4: Implementing Learning Series with selected partners:

Facilitated a Learning Series titled: "Funding Systems Change and the role of Intermediaries from the Global South". In Latam we convened for three 2-hour sessions and in Asia, to two 2-hour sessions.

Phase 5: Profile and benchmark reports:

We invited a group of organisations to respond to a self-assessment on their philanthropic practices based on the Framework of Nine Qualities.

Phase 6: Final Report and recommendations:

Consolidated a final report integrating the different workstreams. By triangulating insights from desk research, interviews, learning series and self-assessment we produced an ecosystem mapping, key recommendations, and a curated portfolio por and exemplary cases of potential partners.

We want to highlight that this research was possible through the engagement and contributions of the different actors we convened, most of which have senior leadership/ representation within their organisations.

GLOSSARY

Regranter

Directs funds towards organisations through a regranting process. The regranting organisation might define strategy, requirements, location, selection criteria, capacity building programmes, monitoring, and follow ups. The regranting organisation might be trusted to bring local context, thematic knowledge, and field services (language, cultural skills, visits, relevant due diligence, legal and fiscal framework). In developing these competencies, the organisation can be donor-centric, staff-centric, or community-centric.

Regional network with backbone organisation

A regional network is formed by different organizations that come together to resolve a social problem at the systems-level. It can be governed by a theory of change or set of principles to take decisions and ensure accountability. Interventions or programmes are usually developed with members, and funds are administered with common criteria to regrant. A backbone organisation is a trusted partner that supports the development of the network.

Implementer

Administers funds (including strategy, requirements, location previously allocated to organizations and programs by a funder or group of funders. The funder, the implementer, and the organisation might negotiate and agree together on capacity building programmes and follow up activities.

Donor / Funder

A philanthropic individual or foundation that provides funds to non-profit organisations or social enterprises.

Grassroots organisations

Individuals and organisations that interact directly with constituency groups in the community. They have mechanisms for constituency voice and participation in their governance and decision-making. They may or may not be legal entities.

Community-based org

Organisations that are formed by constituency members cooperating with each other towards particular development agendas or purposes. They may or may not be legal entities. Examples include self-help groups, local collectives, cooperatives.

Social innovator or social entrepreneurs

Individual or organisation that places importance in solving societal issues through innovative approaches. This can be represented by individuals, organisations, movements etc. This can be not-for-profit and/or for-profit.

INGO (International Non-Governmental Organization)

A non-governmental organisation/ federation/ confederation that operates in more than one country. In each countries they may take different organisational forms, but usually have some form of affiliation/ connection across all countries. They also often (but not always) have connected/ allined governance structures and processes across the countries in which they are represented.

Fiscal sponsorship

When an intermediary is able to receive funds on behalf of an organisation, often to alleviate stringent or challenging legal frameworks and requirements. It is usually accompanied by related services such as fiduciary oversight, financial management, and other administrative services. Other terms used to describe fiscal sponsorship include: fiscal host, fiscal agent, incubator, accelerator.

Intermediary

For the sake of clarity, simplicity, and consistency, we use 'intermediary' to mean those interface or bridge 'organisations' that regrant founders' support. These organizations may also fulfil other unique functions such as capacity building, convening, coalition building, advocacy and more. These additional roles are often unique to the capacity of the intermediary organisation. See Part 2