
UNDERSTANDING THE REGRANTING ECOSYSTEM IN THE GLOBAL SOUTH:

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

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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.

With this report, we are excited to deepen the conversation on the roles of “intermediaries” in the Global South as potential actors who can contribute to creating 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, informal conversations, and five Learning Series Sessions¹.** We are very grateful for these exchanges and committed to faithfully transmitting the different voices and hopes we heard throughout this process.

This study is a conversation starter carried out in partnership with Oak Foundation. We share what we have learned 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, please drop an email on this website <https://philanthropydialogues.org/>**

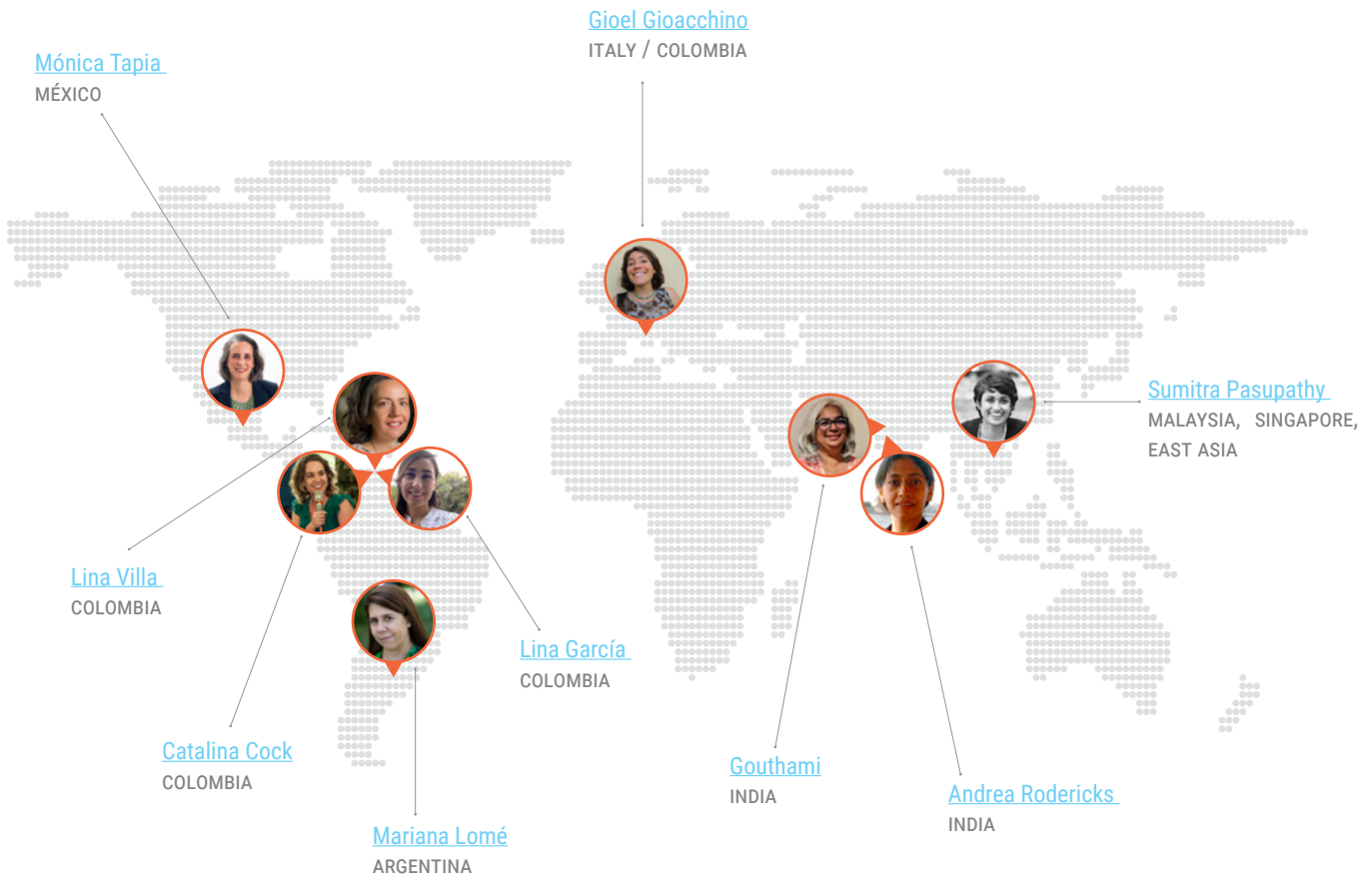
We look forward to holding further conversations, weaving connections and actions, and building a more robust, more just funding ecosystem.

¹ See Appendix 1 for the list of contributors

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 spent the last decade carrying out participatory research and advising philanthropic institutions in both the Global North and South.



[MORE ABOUT THE AUTHORS](#)

TABLE OF CONTENTS

PART 2



Introduction	5
1. The philanthropic ecosystem in Asia	6
1.1 Brief historical background.....	7
1.2 Trends in philanthropy and spaces for leverage.....	10
2. The philanthropic ecosystem in Latin America and the Caribbean	18
2.1 Trends in philanthropy and spaces for leverage.....	19
The case of Articulación Regional Feminista.....	27
The Caribbean Case.....	29
3. Emerging qualities and roles of potential intermediaries	32
3.1 Emerging Qualities.....	33
3.2 Emerging Roles.....	35
Conclusion	38

INTRODUCTION

This document is the second of a four-part report on the philanthropic ecosystem in Asia, Latin America and the Caribbean. The study was funded by the Oak Foundation and informed by over 90 interviews and two Learning Series. Through this process, we explored current practices and emerging trends in the philanthropic ecosystems in these regions. We identified potential ‘intermediaries’ ready to support grassroots and civil society organisations through more than channelling funds and enable philanthropy to empower the environment, gender, and social justice movements.

Part 2 of our report focuses on **the characteristics, dynamics, and emerging trends of the philanthropic ecosystems in the regions** that surfaced during the study. It spotlights trends in philanthropy, highlighting critical challenges and promising practices. We then explore nine qualities we identified as potentially significant for ‘intermediaries’ to drive greater community centricity in the philanthropy ecosystem.

This part of the report is organised into three sections: **1)** The Philanthropic Ecosystem in Asia; **2)** The Philanthropic Ecosystem in Latin America and the Caribbean; and **3)** Emerging Qualities and Roles of Potential Intermediaries.

(For the purposes of this publication, China has been excluded from the analysis. For more information regarding China, please contact us through the website listed above)

We enclose the terms ‘intermediaries’ and ‘re-granters’ in 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, many are willing to adopt the terms, but the critique is that they reduce Southern organisations to in-betweens, putting in the shade their agency to add value. They are not merely grant administrators, but propose new perspectives on problems, strategies, processes, innovate, and shape agendas.

1



THE
PHILANTHROPIC
ECOSYSTEM
IN ASIA

1.1

BRIEF HISTORICAL BACKGROUND

The Social Development sector in Asia evolved over the 20th century, particularly after World War II, when countries with large populations, such as Indonesia and India, became independent. **The initial development focus in much of newly independent Asia was on poverty alleviation programmes** emphasising charitable giving towards education and health projects. The frequent disasters in the region also attracted cash and in-kind donations towards immediate relief work. In-country philanthropy primarily consisted of wealthy individuals supporting poorer members of their communities, particularly those who shared the same religion, caste, or indigenous background. Aid from overseas donors, typically from the Global North, remained the primary source of funds for social development work. These included bilateral donors from Global North governments or INGOs that raised funds from individuals in the Global North to support projects in the Global South.

As the 20th century progressed, **social development work evolved to focus on the rights of individuals and communities as a sustainable way of development**—movements for rights to land, water, forests, and other resources swept across much of Asia. Over time, social innovations emerged in every aspect of development work to harness rapidly changing technology and working methods for the greater good. Communities and grassroots-led social innovations in countries like India, Indonesia, and Thailand began to shape the broader field and global discourse. For example, Acumen, Ashoka, Synergos, Skoll Foundation, Ford Foundation, Rohini Nilekani Philanthropies to name a few, support more than 1500 fellows working on social innovation projects across Asia.

Towards the end of the 20th century, **as women's movements grew more robust, they began focusing on access to and control over natural resources**, directly impacting their livelihoods and, hence, their lives. In this century, the impact of climate change on every aspect of life and gender equality has forced communities to understand and foresee how their lives and livelihoods will likely change dramatically in the coming decades.

In **recent times, there has been growing discourse around systems change**, which goes beyond the direct delivery of social services to navigate the complexity of current challenges better and influence their lasting impact.

Rights-based practitioners and social innovators have, in different ways, shaped this work and contributed to a growing and vibrant discourse on how to fund systems change work that embraces complexity reliably.

Because of this, questions about power – the nature of power and who wields it, who makes decisions for whom and about whose welfare, who is accountable to whom, etc. began to surface more frequently in the Global South and found resonance in some organisations in the Global North (particularly funding organisations). Attention to processes of decolonization in the 21st century, inviting those most marginalised to represent and speak for themselves, added a sense of urgency to the call to shift power from the Global North to the Global South.

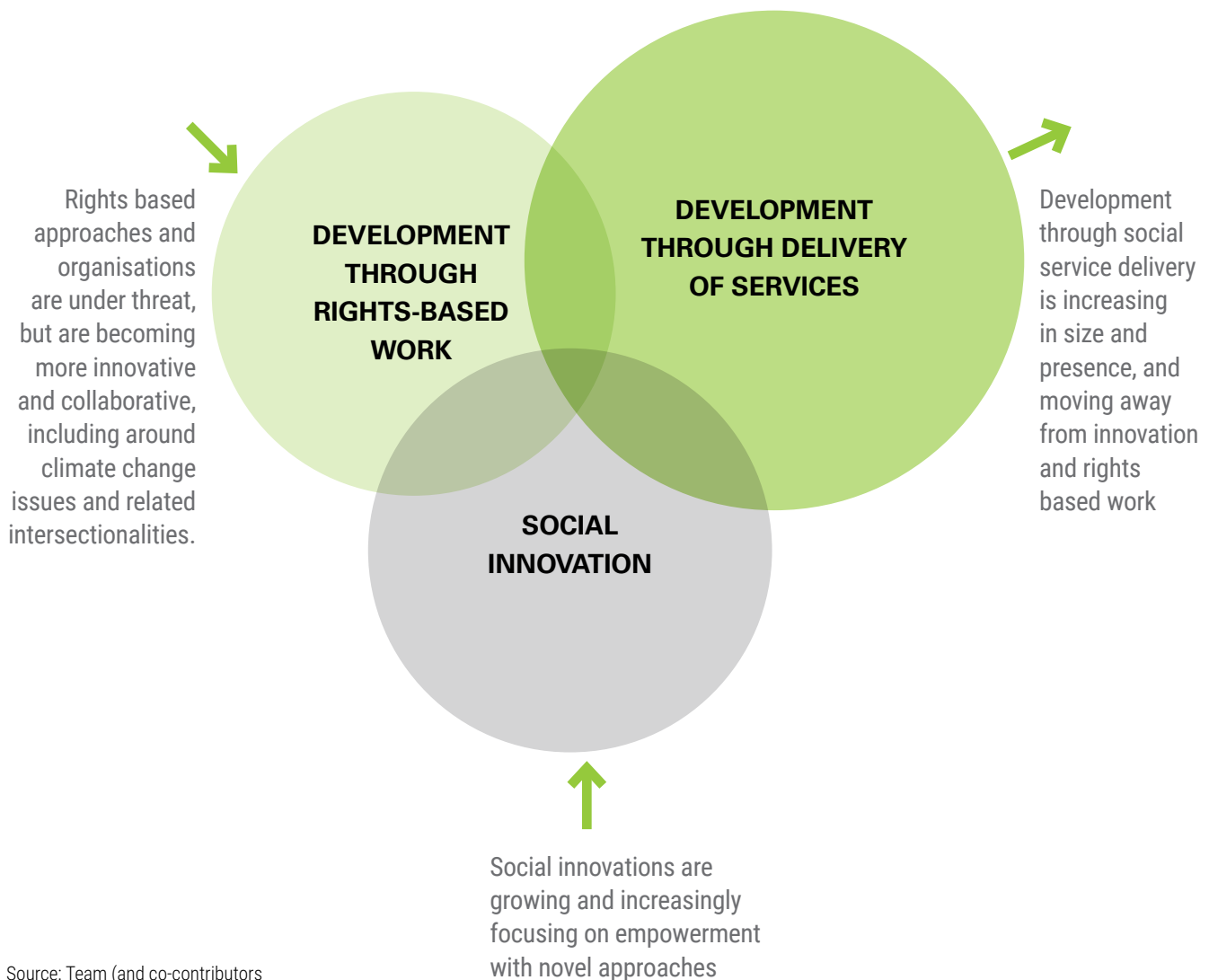
As Asia prospered in the last two decades of the 20th century, the nature of philanthropy began to change. **The role of National Governments in development work expanded, and they brought in more regulatory mechanisms** to monitor the work of the voluntary or citizen sector. As terrorist movements have grown globally in the 21st century, these regulatory frameworks have become more stringent in Asia and are forcing the citizen sector to look for funds in-country. Similarly, anti-money laundering provisions continue to create regulatory restrictions around the cross-border flow of philanthropic funds.

Corporate foundations have become a significant source of funding for the citizen sector, and High Net Worth Individuals (HNWI) also support causes that are dear to them. In India, respondents suggest that philanthropy sources will split three ways, almost equally, between overseas donors, corporate national foundations, and HNWI. The State remains the largest funder and implementer of development works, with the citizen sector's contribution being to fill gaps, provide insights on the emerging needs of the most vulnerable or excluded, inform and advocate policy change and drive innovation through collaboration and cross-border network development.

The growing share of contributions from corporate foundations closely aligned with the government and pressure to conform to demanding regulatory environments has led to a **shrinking of space for rights-based work and innovation and an expansion of service-delivery-type interventions**. In addition, respondents indicate that corporate foundations tend to take a “techno-managerial” view on solving problems, which can focus on direct service delivery rather than systems-change or civil and human rights-focused work. **For climate-related issues, this manifests in narrow product development, “tip of the iceberg” type interventions, and a tendency toward “safe”**

partnerships with large INGOs. This kind of funding is typically inflexible and short-term against annual plans, deliverables and budgets, with limited attention to uncovering effective pathways to impact. In contrast, social innovation and rights-based work require flexibility, medium to long-term funding, space for innovation and learning, new collaboration and field-building forms, and shifting and growing power. Actors in the philanthropic ecosystem in Asia believe that Global North foundations, global funders and community-centric INGOs need to focus on supporting this kind of work.

The diagram below depicts a recent trend seen by stakeholders: Rights-based and social innovation organisations drift closer together in their approach, with potential for complementarity and innovation, especially related to climate change. Service delivery organisations increase in presence and size and move away from social innovations and rights-based work.



1.2 TRENDS IN PHILANTHROPY AND SPACES FOR LEVERAGE

TREND #1

Community centrality is not yet (and can become) the mantra for philanthropy.

While there are exceptions, the giving culture in Asia still **does not sufficiently focus on the most vulnerable communities or the most urgent issues**, such as those of Indigenous peoples, environmental frontline defenders, and loss and damage work.

Innovations in giving, such as community-centric giving circles and regranting, are emerging but are still rare, primarily at the national or subnational levels. Unrestricted funds, especially for overheads and longer-term funding, are increasing but slowly. In this scenario, it is natural that systems change work needs to be more understood and explored. Advanced supporters of frontline defenders, such as the Samdhana Institute, agree that they must sufficiently attempt local or regional fundraising. This could be because they have successfully raised funds from groups such as Global Greengrants and Yield Giving.

Communities and grassroots organisations, on the one hand, and donors, on the other hand, use different languages, literally and figuratively. They also differ in sensibilities and sentiments, creating more significant divides and contributing to unequal power dynamics. Growing awareness and dialogue around these challenges in the ecosystem may open opportunities to address them.

Granters or intermediaries in Asia are typically donor-centric, exacerbating power imbalances and reducing shared decision-making. However, a few donors comprehend the power of communities and are actively trying to shift power in their favour through trust-based philanthropy. These include the Rohini Nilekani Philanthropies, Numun Fund, Ananta Fund (by Ford Foundation), Women's Fund Asia, Samdhana Institute, Tara Climate Foundation, Urgent Action Fund for Feminist Activism, and Women Win. They are essential players in the philanthropic ecosystem in Asia to leverage change.

New funding platforms are emerging, but they have strong donor-centric views on regranteeing. Examples include recent platforms in Asia with significant pledges. These platforms have a list of “safe bet” grantee organisations pre-approved by donors, including large INGOs with established regional and local teams. While some of these platforms claim to work with communities, their mechanisms for regranteeing often put them directly in competition with citizen sector organisations. There is an opportunity here for increased dialogue and deployment with a systems-change lens and whole ecosystem resilience view.

Respondents indicate that many donors operate from a “power-over frame” without understanding the strengths and capabilities within community-based organisations. Their staff are mainly from the business sector, and they impose unrealistic conditions on grantees. Their boards and management structures often need more representation from the community or civil society.

Processes that could contribute to shifting power philanthropy, such as **open calls, participatory grantmaking, open challenges and trust-based philanthropy**, are still considered innovative approaches to philanthropy.

Following legislation, countries such as India (CSR laws) and Singapore (cross-border rules) provide opportunities for corporate foundations to step into philanthropy. Some of these foundations view **social development work through the business lens** and may impose their thinking and doing. While companies deal with products and services, **the citizen sector deals with complex social and behavioural change processes in human beings with interconnected issues**. This fundamental difference needs to be recognized, to avoid leading to initiatives that could be reductionist, lacking innovation and with limited potential for lasting social impact. Corporate foundations’ proximity to business also influences funding decisions and limits community-centricity. In South and Southeast Asia, businesses work closely with national governments, making engaging directly with human rights issues challenging as they are often problematic and controversial. ASEAN practises a non-interference policy across its member states, preventing greater collaboration between citizen organisations and individuals across the region.

Funding support for thematic areas such as energy transition, community-driven just transition, climate and Indigenous rights, gender rights, land rights, human displacement, etc., is limited at the regional level.

“In the climate, we are talking at the level of one, how are people and communities at the grassroots solving problems. We need a sense of urgency regarding climate change and to mobilise “Everyone everywhere all at once.”

TREND #2

Shrinking civic space is upon us in multiple ways.

“If we do not have civic engagement, our climate change work is meaningless and superficial. We need to talk about indigenous rights, gender, land rights, just transition, if we want to address climate change.”

As political contexts become more rigid, the civic space for raising issues of the most marginalised is shrinking. This causes concerns about potentially superficial and ineffective climate interventions as donors tend to “shy away” from funding initiatives that could ruffle government feathers, even if they know the urgency of the matter. In some countries, the State is quick to take action against initiatives it perceives as critical of its work.

However, this study’s respondents pointed to some exceptions among donors, such as the Climate Land Use Alliance funders, Packard Foundation, Luminate, Ford Foundation Indonesia, Co-Impact, Yield Giving, Laudes Foundation and Silent Foundation. The efforts of these donors can help leverage change.

Some civil society representatives suggest that donors must be open to flexible and less tightly defined terms of grantmaking, giving citizen organisations the space to implement programmes under the radar, if the situation demands. Implementing organisations could adopt more granular or cell-like structures, becoming more localised than large national or regional players.

In this context, it is important to communicate securely. There is more to an organisation’s work than can be shared publicly on websites and social media. Perhaps it is time to be more low-key or under the radar in our communications and presence. Building trust and working on long-term partnerships contribute to enhancing the quality of communication.

“The expectation is that the next crackdown on civil society will be on organisations doing climate work.”

TREND #3

Regranting in Asia is emerging almost “accidentally” and quietly.

The language of “**regranting**” is generally new in South and Southeast Asia, especially for communities and grassroots organisations. Human rights and social innovation actors lead innovations in the regranting space. At the regional level, there are currently limited climate change-focused actors. But at national and subnational levels, regranting or sub-granting is emerging “quietly.” It is common for regional and national organisations that engage in regranting not to share details of their regranting activity in their annual reports or websites for security reasons.

The ambition to regrant at a regional scale is increasing, especially for organisations in India, Indonesia, Malaysia, Singapore and Thailand, such as ARROW in Malaysia and PEKKA in Indonesia. Many organisations desire to transfer promising practices, ideas, and innovations across the Global South, such as to Africa or Asia.

Several organisations in the Philippines, Malaysia, Thailand, and Singapore are expanding their capacities to work at the regional level. In countries with stringent regulatory environments, organisations are discreet in their operations and are exploring all legal options to continue their regranting work compliantly. It is necessary to support these organisations in building the knowledge and capability to grow this ambition.

Newer actors can play significant roles in shifting power dynamics, such as the Numun Fund, which operates through shared decision-making. Where the regulatory frameworks present restrictive fiscal and legal requirements for regranting, Give2Asia (now Myriad Alliance) has a Friends Fund, which can offer fiscal sponsorship support to grassroots organisations and social innovators. Similarly, their fund pools provide disaster response across Asia, allowing Give2Asia to regrant directly into the community.

Some Global North donors and grantees such as Women Win, Women’s Fund Asia and Global Greengrants Fund have a vital role in the critical activation and development of a new emergent philanthropic and intermediary ecosystem in the Global South. For example, Women Win transfers knowledge, incubates regional grantees, and provides technical expertise in fiscal responsibilities as a regranter. They are exploring the question, “How do we unlock and

allow for more replication and innovative models to decolonize wealth?" They recognize that there is an appetite and opportunity to create more learning spaces in the Global South to allow for the exchange of ideas and to set up innovative models of philanthropy. An example is their incubation of the Numun Fund to decolonize fund flows and decision-making and bring them closer to communities and grassroots organisations.

Others with significant funds, such as Yield Giving and Co-impact, catalyse regional/global regranting action, typically in partnership with social innovators and rights-based leaders who envisage a broader impact. One example is the Frontline Community Fund, supported by Blue Ventures.

Relational power dynamics can shift if intermediaries closer to the ground engage in regranting. However, we did hear from one intermediary organisation working with displaced persons at the frontlines that they would face a conflict of interest with their current partners if they regrant. They are exploring ways to resolve this conflict as they understand the importance of becoming regrants themselves.

The Indian slogan of *Jal Jungle Zameen*, loosely translated as Water, Forests and Land, resonates with environmental concerns of today related to biodiversity, marine ecosystems, and sustainable agriculture in the context of the communities, especially women, who are entirely dependent on them for their lives and livelihoods. While the causes of Climate Change are complex and varied, the impact is most on those whose survival depends on the natural resources around them. We need to be able to support Just Transition principles upheld by Environmental Frontline Defenders, especially women and Indigenous peoples, to move forward. Asian examples include Blue Ventures, Samdhana Institute, Tara Climate Foundation, and the India Climate Collaborative.

Organisations working on women's issues, indigenous peoples' rights, etc., are increasingly navigating the intersectional nature of Climate Change in their work. Yayasan Kurawal in Indonesia believes that protecting civic space is an entry point towards larger questions of Climate Change.

TREND #4

There is a felt need for a new approach with new roles, behaviours, language, and configurations.

In 2020, the pandemic significantly disrupted the entire field in the Global South, including Asia, as communities found themselves isolated from essential services over a short time. As government, local administration and direct service organisations faced challenges in reaching vulnerable communities, innovative actors, including some philanthropic partners and intermediaries, took the opportunity to slow down and rethink their models.

The role of community- and grassroots-centric actors has become more critical in many countries such as India, Indonesia, Malaysia, and the rest of South Asia and Southeast Asia. Several new ways of organising, collaborating, partnering, and other practices are emerging. Critically, there is greater attention to the relational space between external stakeholders and communities to collaboratively bring about large-scale change based on trust and agility.

This reality intersects with other trends, and post-pandemic, there are opportunities to learn from this “new organising” to anticipate and navigate the complexity of a poly-crisis-ridden world driven by climate and environmental effects, geopolitical wars, future pandemics, and the acceleration of unintended consequences of technological developments.

The current power imbalance encourages “isomorphic biomimicry”, where the grantees change the language to suit the granter with little or no change in the work on the ground.

In addition, in our conversations we heard the need for new language that better represents the work in terms of “resilience”, “innovation”, “empowerment” - this is an invitation to go beyond the term ‘activism’, which invites repression in the current political climate.

What we heard in our conversations is that the “Intermediary Field” needs to **explore new configurations of stakeholders, new roles, and different fund flows**. We need to encourage shared decision-making in governance, as Women Win has done, as we move to a new future. In Asia we have examples of pooled funds and funding alliances such as Samdhana Institute, Numun Fund and ARROW.

Regranters need to function as 'intermediaries,' engaging in advocacy and capacity strengthening, consciously shaping and enriching the philanthropic ecosystem. An example is Atma Connect, which uses technology pooling in impact measurement to allow for more democracy and direct participation of the most marginalised. Technology could also enable people to connect more securely and efficiently. We saw an example of connecting online, an adaptation forced by the pandemic, which has shifted ways of working.

There is an opportunity for organisations in the Global North to contribute to systems change by investing in organisations in the Global South that are forging ahead with new ways of working. If regulatory frameworks become more complex, such as in Indonesia or India, the investment needs to build capacities to meet those requirements. Large Asian donors and Corporate Foundations prefer to minimise risk by supporting large organisations, including INGOs, who do not need additional support to meet legal and regulatory requirements. Ford Foundation is setting up a resource hub in Indonesia to support implementing organisations in building capacities around Finance, Administration, Human Resource Management and Strategic Communication.

TREND #5

Unleashing stronger lateral connections among communities, grassroots organisations, civic spaces, and advocacy across Asia.

Community groups are experimenting with developing stronger lateral connections - grassroots organisations across Asia are co-creating innovative forms of civic space and increased possibility for collaborative advocacy. In today's poly-crisis world, these **connections and networks need to be actively encouraged**: funding and other non-financial resources need to be directed to these processes to strengthen networks and build capabilities. This is very important in their early stages, until they begin to work more autonomously and organically.

Respondents point out that, while it may be more straightforward to fund larger INGOs, it is essential to direct funds and other resources to groups and networks that are able to unite communities and grassroots organisations around a common purpose. Some of our respondents who are community-centric intermediaries believe that, as INGOs increase their fundraising activities there is an opportunity for new, innovative kinds of partnerships and configurations, with more local, community-centric organisations beyond the donor-implementer model.

2



THE PHILANTHROPIC ECOSYSTEM IN LATIN AMERICA AND THE CARIBBEAN

2.1 BRIEF HISTORICAL BACKGROUND

In Latin America, traditional philanthropy has focused on giving directly to individuals in need and to Churches, as well as volunteering through Church and religious groups. Humanitarian responses to disasters and conflicts have an appeal, especially for middle and lower classes, to donate, but it is frequently in kind and through existing social assistance networks. Both the State and the Church have been critical actors in assuming responsibility for meeting the social needs of the population rather than voluntary and non-profit organisations. There is low trust in these institutions and organisations, which are often used as facades for political campaigns and agendas.

The **growth and expansion of civil society organisations and institutional philanthropy** have been a recent phenomenon in Latin America since the 1960s and 1970s. Each country has a unique history, where community development, environmental, gender equality and human rights organisations sprang from social and indigenous movements, political struggles, and progressive middle classes. Overall, the average size of organisations is small, primarily focused on social services delivery (education, health, and community development). More recently, environmental, gender, and human rights organisations have emerged but in fewer numbers.

The philanthropy landscape has a more recent origin in the 1990s and 2000². Global and national corporate foundations are new, but they have had the most critical growth. They predominate in the philanthropy sector and have networks and Corporate Social Responsibility (CSR) consultants. They primarily fund social services delivery within a closely connected network of well-known organisations and local elite circles. Their funding is annual and small, restricted to projects and good marketing/ greenwashing purposes, staying away from controversial and complex topics, such as human rights and gender equality. In most Latin American countries, businesses and governments maintain a close relationship. Therefore, human rights, policy advocacy and environmental defenders (mainly against extractive concessions) are not interesting to business foundations.

² For more details, see Sanborn and Portocarrero (2005), Tapia (2010), Carrillo Colland and Tapia (2010), Berger, Carrillo Collard and Tapia (2009) and Carrillo Collard, Vargas Arias, Tapia and Layton (2007). The classification of foundations comes from the Council of Foundations (2023).

Local elites are in the process of differentiating their family and corporate offices, foundations, and donations, especially as younger generations become interested in philanthropy. **Family and independent foundations** are still

few in each country, with a very slow and emerging professionalisation. Most staff recruitment and relationships are established through trust and based on “who knows who.”

International (especially from the USA) foundations have shaped and are a reference for both funding innovative social transformations and creating institutions. In the 1960s - 1970s, Universities received large gifts and developed. In the 1980s - 1990s, democratic, human rights, transparency and environmental organisations were created. In the 2000s, anti-corruption and gender equality efforts were funded, and local philanthropy took root. Among these last ones, **community foundations** have been promoted since the 1990s, with a particular focus on México and Brazil. After two decades, some of them are thriving, while others are still in the consolidation process. Since the beginning of this century, attempts have been made to replicate this model in the region, with little success until now.

International foundations and corporate and national philanthropies in Latin America **do not mix funds or collaborate**. There are very few spaces, organisations, and projects where they co-exist.³ As international foundations leave countries or shift strategies, organisations do not find national and corporate funding to substitute for them. Some corporations and elites fund large environmental organisations and get a seat on their Boards, particularly INGOs and their local chapters. Their connections are forged mainly through their global relationships and their New York and Washington corporate headquarters rather than through their national links. This trend has also contributed to an elitist greenwash and further questions the role of these organisations in the field.

Legal and fiscal regulations in Latin America have been underdeveloped compared to the Global North. Most countries still lack the essential legal differentiation between an organisation and a foundation. Therefore, many so-called foundations - even corporate and family ones - implement directly rather than give grants. There are **few grantmakers and fewer foundations with endowments, assets, and annual, stable grantmaking**. Financial crises - which often hit the region - are reflected in lower or zero donation budgets. Under these conditions, capacity building and professionalisation need to be higher on the agenda.

³ The national philanthropy centres - consortia and their annual gatherings, such as Cemefi (Centro Mexicano para la Filantropía) in Mexico, GIFE (Grupo de Institutos, Fundações e Empresas) in Brasil, GDFE in Argentina are some of the few spaces where these elitist actors mix and come together. However, there are limited projects where they collaborate. They usually work in silos and work through personal contacts.

Governments must understand and promote civil society, philanthropy frameworks, and public policies. Recently, as part of the political and authoritarian contexts, civil society (and philanthropy) have become another polarising topic in politics. Emerging **public funds** for independent civil

society have diminished or disappeared, and legal and fiscal regulations have tightened. Most importantly, the **public narrative** has also turned hostile against these actors. Grassroots defenders are called “agents manipulated by outside forces” by some political leaders, especially when they have questioned policies and authorities. **Controls over international funds and philanthropy** have been introduced to different degrees, from Nicaragua, Cuba and Venezuela, where they are completely banned, to Bolivia, Ecuador and Argentina, where certain obstacles exist; to Brazil, Colombia and México, where fiscal reforms have been fought defensively.

Anti-laundry international measures, especially around the banking and governmental sectors, have hit a fragile civil and philanthropy sector that is also seen as a non-lucrative market and “suspicious agent”. New financial reporting requirements have been set up, often duplicating fiscal regulations. Still, neither of them transforms itself into a more comprehensive public positive transparency or actual combat towards drug trafficking and its financial flows.

Therefore, **national and corporate philanthropy maintains a low profile** and low involvement in transformational issues. These challenges become more acute in the Caribbean. The reduction of civil society spaces, the scarcity of continuous funds, and the complexity of consolidating collective spaces between small countries - which manage three languages, idiosyncrasies and diverse statuses of independence concerning the countries that colonised them in past centuries - pose tensions in a region recognized for its image as a tourist paradise, but deeply affected by drug trafficking, migration, deregulation of extractive industries and the invisibility of indigenous populations.

There are few civil society organisations that are dedicated to what participants in this study name as the significant challenges of the region: the consolidation of environmental and social protection laws, advocacy for the signed international treaties and the right to demonstrate without exposing themselves to repression. With few exceptions, Financing focuses on donations for short-term projects, which only allows for robust and professionalised NGOs. The empowerment of grassroots organisations is a further and distant challenge in this context.

2.2

TRENDS IN PHILANTHROPY AND SPACES FOR LEVERAGE

We describe here philanthropic trends we observed in the course of the study that can give us a sense of where the region is heading and where there is room to leverage new dynamics:

TREND #1

Regranting funds at the national scale is emerging.

Regranting funds has been emerging at the national scale. At that scale, they can manage the complexities of legal and fiscal matters, understand local contexts and actors, develop capacity building, and support grassroots organisations.

What is emerging?

- Regranting funds at the national scale are emerging in México, Central America, Brazil, the Southern Cone (Argentina, Chile, and Uruguay), Colombia, and the Andean region (Peru, Ecuador, and Bolivia).
- Environmental regranting funds have existed for longer and are maturing in México, Brazil, Colombia, Caribe, and Chile (in the near future).
- Gender equality regranting funds have emerged and consolidated in México, Central America, and Brazil. In the Andean region and Southern Cone, they are in the process of consolidation.
- Human Rights regranting funds are more recent in México and Brazil. They do not exist yet in other countries.

Due to the complexities of regranting funds, they have emerged nationally.

Due to the complexities of regranting funds, they have emerged nationally. Among the complexities they need to manage are:

- Legal and fiscal matters within a country or region.
- Understanding the local context, being closer to actors, and particularly a very fluid context where grassroots organisations emerge and disappear quickly.
- Develop capacity-building services and alliances, as well as their follow-up.
- Some funds, like [Fondo Mexicano para la Conservación de la Naturaleza \(FMCN\)](#), have developed vertical articulations:

Even if their origins came from outside, these regranting funds have taken national roots and are playing a relevant role at the regional level. Some are also developing vertical regional articulations (subnational and Latin America region) among a community of donors in each country.

- At the subnational scale, supporting the creation of ecoregional funds ([Red de Fondos Ambientales de México- RedFAM](#)).
- At the Latin American regional scale, with the Latin American network of national funds ([Red de Fondos Ambientales de Latinoamérica y el Caribe - RedLac](#)).

These national funds mainly originate from international donors, their collaboration, and exit strategies from these countries. Among them are the Global Environmental Facilities (GEF), Kellogg, Ford, MacArthur, Inter-American, Mott Foundations, and the Global Women's Funds.

TREND #2

The added value of regranting funds is multiple.

Climate crises, political changes, and the gradual rise of these agendas in the public debate in these countries require flexibility and agility in allocating funds.

What is the added value of these regranting funds and their bridging role within the current localization pressures?

- Recruitment of **diverse and transformation-oriented board members** bring local/ grassroots knowledge, understand the system and advise on strategy.

Many regranting funds are developing a model that responds both to the requirements of Northern donors and to the needs of grassroots organisations, which is putting a great deal of pressure on these actors.

- Along with boards and committees, **locally experienced and trained staff** that understand and manage the context, the issues, and the actors, as well as the granting selection and follow-up processes.
- Understanding of the **legal and fiscal barriers and how to overcome them** with reasonable due diligence adapted to local contexts.
- They receive and **break-up large grants, dispersing them** into smaller quantities of grants and managing them in a timely manner.
- They have set up **granting procedures**: public calls, selection, and deliberative processes to select grantees and assign grants. Some funds, like Fondo Semillas, do this with solid participation from the feminist community and convening stakeholders. Their board members mainly do this convening and mediation.
- They dive deep to **reach out to grassroots and non-legally incorporated** groups.
- They have developed and connected with **locally relevant capacity-building partners** and provide hand-holding and convening services for small grantees.
- They have built **context-sensitive accountability-trust-based mechanisms**.
- They manage **financial complexity for fundraising, regranting and overhead** costs.
- They provide services for **monitoring and communicating results, impact, and lessons**, which are crucial to gaining local legitimacy and earning more national donors. Most of them produce annual reports and are transparent about their funds and results.
- They aim to **attract new donors with complementary** strategies and portfolios.

However, it is important to distinguish these new models from other recipient organisations, which are more replicators of northern management models. These organisations claim power over resources without adding value or understanding the logic and needs of the communities.

TREND #3

INGOs are increasingly creating friction in the ecosystem due to their global structures, the incentives being created and ways of exerting control.

The INGOs usually have a high rotation of their top national managers and staff, with a low capacity to manage the locally mentioned complexities: understand contexts, actors, topics, and relationships.

The role of international NGOs and their national chapters is being questioned. They are facing a problematic transformation as there is a trend toward defunding their global operating models. Therefore, many are resorting to becoming regrantees and partnering with local organisations.

On the one hand, they are vital in transferring official aid and corporate funding from the Global North to these countries. They win official bids and control resources in the Global North because they are considered a “trusted/reliable” brand. On the other hand, their global structure and due diligence require them to recruit and control highly qualified and highly pressured, scarce human resources in these countries. Their staff must be bilingual, globally educated, multicultural managers who are highly compensated and have demands on their time and travel. This staff does not necessarily have field experience, deep local contextual knowledge, and long-time contacts at the national and grassroots levels. For example, an interviewee cited a large project with international aid, where her organisation was hired as a design and implementation consultant. The official bid was won by an INGO, which took 18 months out of the three-year project to recruit and fill the executive positions. Then, they had to train and bring them up to speed, which left less than one year to execute and report back. “We could have done it better,” was her conclusion.

What emerges are INGOs who need a clear identity as regrantees. They have developed regranteeing capacities, as their transformations were pressed by fundraising strategies rather than by institutional strategy. They do not have public calls for projects or clear selection criteria. They disburse large funds without due care under time-pressed schedules to less-than-ideal organisations. As a result, there are adverse effects on quality projects and community relations, especially in contrast with local intermediary organisations that invest long periods in building trust and commitments.

What could be seen as something positive - the transfer of funds from the North to the South - at the end of the process results in the destruction of trust, collective work, and networks carefully built over the years by highly effective local organisations.

Regional connectivity, time, and vision require unrestricted funds to establish and operate, but these seldom exist. At the regional scale, networks of intermediaries and funds exist but are fragile and challenging.

TREND #4

Networks of national and local intermediaries and regulators have begun to form to reach regional agendas and funds.

The most notable trend is that national regranters with similar purposes and agendas have begun to form regional networks to cover the Latin America regional scale. These regional (and global) networks of national grantees are related to:

- **Environment:** [RedLAC](#) and [Alianza Global de Fondos del Sur](#)
- **Gender:** [Prospera](#) (although global)
- **Human Rights:** not yet there

Communities of practice have developed (especially in the environmental funds), which makes learning curves less steep for other national regranting funds. Within these networks:

- Grantmaking best practices are shared⁴.
- Common strategies, capacity building and legal-fiscal-financial goals are spread.
- A regional space for fundraising and common donors is developed.
- Cover new territories and inter-sectoral purposes.
- Conversations about tensions between trust and accountability happen.

As national funds are still emerging and consolidating, their funding needs compete with the regional goals and their process of co-opetition.⁵ It might create tensions between national funds and regional networks. Some of these new configurations are extremely dependent on the leadership of one of their members.

⁴An example cited was how to give grants and support in countries with stringent governmental controls, such as Ecuador, Argentina, Nicaragua, Venezuela, and Cuba.

⁵"The idea of co-opetition expresses that cooperation and competition are not two poles irreconcilable, but in social games, both are always combined in different proportions. In the social field, most games are open, given that no fixed physical or symbolic capital is in dispute. Still, rather, it happens that what dispute is transformed depends on the actors' actions. Even that interaction in games of cooperation and competition can make that capital stock grow." Nalebuff & Brandenburger (1996) in Rovere, M. & Tamargo (2005).

TREND #5

Regional networks of national organisations are playing a vital role in advancing global agendas.

Autonomous and professional executive coordination is required to strengthen these networks and a governance space where activist organisations assume roles and responsibilities.

Along with the emerging regional networks of national regranting funds, existing regional **networks of national organisations**, where funds are received and collectively implemented, have a more extended history. They have been identified as spaces where organisations develop collaborative capacities and long-term agendas, such as policy advocacy. These networks allow stronger members to support and accompany national organisations that are nascent, weak, or operating in national contexts of censorship and shrinking civic space. The networks might also need to be stronger on their own, depending on the leadership and structure of some of their member organisations.

National organisations convened in groups of international organisations (International Union of Conservation of Nature (IUCN), for example) receive and manage funding and projects in an articulated manner, with an assigned organisation serving as fund manager and backbone organisation. Although these networks are not typical regranting schemes, their funding with a common agenda can sustain a process of long-term policies compared to isolated project-based funds. Networks are trust-based between members, with an international assembly which encourages working national groups in regional and global agendas, i.e. Latin America members of the Women's Caucus – UN Convention on Biological Diversity are working now to obtain funds and strategize to facilitate the participation of women from Asia and Africa in that group.

The case of Articulación Regional Feminista

The Feminist Regional Articulation for Human Rights and Gender Justice is an alliance of Latin American feminist organisations created as a working partnership to promote and defend human rights and gender justice in the region. It was created in 2004 to promote concerted regional work in the context of women's organisations that reoriented their work to have a greater political impact, sustain the changes and achievements of the past, and monitor the State's compliance.

This alliance of feminist organisations is present in seven Latin American countries: [ELA – Latin American Justice and Gender Team in Argentina](#); [Coordinating Association of](#)

[Women](#) in Bolivia; [Humanas Center Corporation Regional Human Rights and Gender Justice in Chile](#), Colombia and Ecuador; [Equis – Justice for Women](#) in Mexico; and [Study for the Defense of Women’s Rights \(DEMUS\)](#) in Peru.

National organisations support the alliance’s long-term agenda according to their capacities. The alliance needs to have its own resources for long-term strategies. When it has some, one of the member organisations manages them. An example of this could be the publication “[The Rights of women in the Region in Times of COVID-19: Status and Recommendations to Promote Policies with gender justice](#)” (2020)

TREND #6

Without regranting entities, national organisations emerge as regranters and fiscal sponsors.

Being both a regranters and an implementer in the same field creates new tensions.

When no regranting funds or entities have emerged, some prominent national or professional organisations have taken regranting and fiscal sponsor roles. However, this situation poses specific problems:

- They require a more significant financial structure than their projects need.
- Due to political tensions with national governments, they are inspected and pressured for their transnational operations.
- Some assume this role to cultivate and maintain relationships with their donors (who usually take them as regranting partners), assuming and making invisible sunken costs through their financial and operational infrastructure.
- In the community foundations field, this double role of regrantor and implementer/operational has been commonly called the “hybrid model”. However, a recognition of the tensions and challenges of these hybrid models is essential:
- Fundraising strategies compete: Raising funds for their projects or fundraising for regranting funds to others?
- There are operational and administrative differentiated priorities.

- The Board and operational oversight functions have different goals.
- Their relationships and roles could be clearer, particularly with other organisations in the field: Are they organisation partners, or are they their grantmakers?
- Develop new skills in leadership and communication strategies.

The Caribbean Case

Although many of the initiatives surveyed include the Caribbean in their strategies, the region needs to strengthen its identity and independence within philanthropy. Its challenges are different from continental ones. There is a need for the establishment of regional funds. However, we found the perception that, at this time, the organisations that are perceived as the most reliable and have the best connection with grassroots organisations and a true vocation to strengthen a regional vision and strategy are cause-based organisations with suitable professional structures. The most mentioned in our survey have been:

[Jamaica Environment Trust - JET](#)

JET's mission is to protect Jamaica's natural resources using education, advocacy, and the law to influence individual and organisational behaviour, public policy, and practice.

[Canari – Caribbean Natural Resources Institute](#)

Promoting and facilitating equitable participation and effective collaboration in managing natural resources is critical to development in the Caribbean islands so that people will have a better quality of life and natural resources will be conserved through action learning and research, capacity building, communication and fostering partnerships.

[Women's Voice and Leadership – Caribbean](#)

A partnership between the [Equality Fund](#) and the [Astraea Lesbian Foundation for Justice](#) could resource the leadership and transformative agendas of women's rights and LGBTQI+ organisations in the Caribbean region.

Other institutions mentioned include:

[Freedom imaginaries](#)

[The Eastern Caribbean Alliance for Diversity and Equality – ECADE](#)

[Caribbean Coastal Area Management Foundation](#)

[Caribbean Women in Leadership – CiWIL](#)

[The Puerto Rico Community Foundation](#)

New impact investment and financial mobilisation schemes have developed similar and probably complementary capacities as regranting funds: financial management, deep understanding of the context and local/ regional/ global actors, evaluation and selection criteria, careful assessment of funding/ investment levels and monitoring and accountability capacities.

TREND #7

The emergence of creative financial mobilisation schemes, such as Impact Investment.

Other financial mobilisation schemes with similar and complementary capacities as regranting funds are also emerging in Latin America. They come from impact investment funds attractive to younger generations and local governments.

A limited number of Impact Investment funds and financial mobilisation mechanisms exist:

- [SVX México and Colombia](#)
- [Sitawi Finances for Good](#) in Brazil
- [Promotora Social México](#)
- [New Ventures](#)
- [Innpactia](#) in Colombia

These impact investment and regranting national funds are also emerging and have built good links with global funds and investment mechanisms. Some have been working with civil society, grassroots projects, international aid and national and international philanthropists.

As a regional strategy unfolds, it might be helpful to bring them into some conversations about systems change and complementary strategies between justice-oriented philanthropy and investment. Latin American philanthropists and governments that work on social and environmental investment bonds view these methods with interest. However, they also respond to the expectations of new generations, heirs of individual or family philanthropists, who are more oriented to investment than donation. The withdrawal of significant international funds in the defence of rights has also caused consulting firms and organisations to emerge. Some advise cause-based organisations to invest to allow them to develop their funds.

SVX México and Colombia

[SVX México and Colombia](#) is an organisation/ firm founded by two young Latin American women with a finance background and an alliance with a global SVX firm based in Toronto, Canada. They have explored different financial mobilisation schemes, having created:

[Academy of Entrepreneurs, impact investment seekers](#) and impact investors training and journeys.

A consulting firm that advises international aid (USAID, Global Affairs Canada, GIZ, WRI, Conservation International, Heifer, among others) on how to turn environmental and regenerative income generation projects into **investment-ready projects** in Latin America (México and Colombia especially, but also in Peru and Chile).

Developing a regional impact investment fund (Regenera Fund) specialising in environmental and regenerative investments. They are the only Latin America partner in a network of acceleration climate funds from emerging markets [International Climate Finance Accelerator \(ICFA\)](#).

The Case of Sitawi: Finance for Good in Brazil

[Sitawi](#) is a firm founded by a young Brazilian finance entrepreneur. With a (now) large team, it offers different services to philanthropy, investors, and organisations.

Manage environmental funds for conservation of the Amazon.

Partner and help manage emerging Brazilian endowments from Foundations and philanthropy actors.

Offers philanthropic donations and impact investment opportunities to organisations and investors through fiscal and tax sponsorship, diagnosis and design, and operational and impact monitoring.

The Case of Innpectia

Innpectia is a platform for connecting impact projects, social enterprises, financiers, and expert advisors from Latin America. It aims to help find, finance, and strengthen promising projects that need a boost. Innpectia's long-term vision is to reduce the transaction costs of doing good globally through technological innovation.

3



EMERGING
QUALITIES
AND ROLES
OF POTENTIAL
INTERMEDIARIES

3.1

EMERGING QUALITIES

⁵For more information on the Learning Series see Part 3; for more information on the Self-Assessment tool and pilots see Part 4.

To map the ecosystem and learn about the capacities of different organisations, networks, or coalitions, we co-developed this **Nine Qualities Framework** to guide us towards community-centric intermediaries that could play a role in new philanthropic dynamics. The qualities were central to the design of the Self-Assessment tool and informed the Learning Series.⁵

Quality Areas	The kinds of characteristics we look for
<p>1 Geographic Relevance and Scope</p>	<p>Board members, grantees, and operations are mainly located in a country/ies of the Global South and have Global South work experience (for Board members and staff). They can work and shape issues across the region/ subregion/ global scale and have a regional/ subregional vision.</p>
<p>2 Regranting Identity</p>	<p>Regranting identity, legitimacy, processes, and experience in grant-making and accountability. Attention to equity, justice and shifting power. If a coalition or network works with a good backbone organisation able to redistribute the grant and be accountable. Capacity and intent/ willingness to regrant in countries other than where it is located (within or outside its main region). Familiarity with culturally responsive and participatory grantmaking. Understand pain points and bottlenecks in grantmaking, especially for grassroots organisations.</p>
<p>3 Implementing strategy</p>	<p>Ability/ interest to respond and implement agendas, projects, and regranting according to the donors' (or group of donors/ partners) co-created strategy. Demonstrating leadership by adding downstream and upstream value through bridging ideas and co-created strategies. Openness to address other issues despite having their focus areas. Understand legal, fiscal, and contextual constraints for working with or regranting grassroots organisations.</p>

Quality Areas	The kinds of characteristics we look for
<p>4 Impact</p>	<p>Deep expertise/ knowledge and existing portfolios in priority themes (gender, climate, food and energy systems, human rights). Proven ability and experience to work across themes with intersectionalities, cross-over work, and systemic analysis through their activities, regranteeing, networks, coalitions, and partnerships. Staff and board members with diverse expertise.</p> <p>Clear vision/ strategy for scaling up, out, deep, affecting meaningful change with others.</p>
<p>5 Grassroots outreach, relationships, role (relational space)</p>	<p>Ability to engage diverse actors (including individuals, networks, and movements) in the relevant ecosystem and have significant outreach to Global South-led and community-based organisations. Proven ability to foster community, facilitate connections, cultivate trust and enhance collective learning (field builder).</p> <p>Good understanding of their constituency or ecosystem, including at the grassroots and proven ability to reach them. Sensitive to the power dynamics in the funding ecosystem in the Global South between granter/ grantee. Experience with convening and different modalities of collaboration beyond sub-granteeing.</p>
<p>6 Advocacy and Influence</p>	<p>Good understanding of civic space, political context, civil society regulation and emerging trends and risks. Strong collaborative advocacy/ campaigning capability to collectively influence policy and public narratives. Ability to engage others in collective learning and knowledge building.</p>
<p>7 Leadership for systems change and complexity</p>	<p>Established culture and practices for systemic ways of working, engaging with complexity and shifting power within and beyond their organisation: analyse, convene diverse actors, facilitate vision setting and agreements, follow-up and accountability.</p> <p>Clarity of long-term vision around systems change and systems-level solutions, including investing in local ecosystems and cultivating the field.</p>

Quality Areas	The kinds of characteristics we look for
<p>8 Governance, decision making and accountability</p>	<p>Governance and decision-making structures and processes that demonstrate authentic adherence to human rights, DEI and strong accountability to civil society voice and grassroots-led organisations, especially in the Global South.</p> <p>This includes mechanisms for civil society participation in decision-making.</p>
<p>9 Organisational capabilities</p>	<p>Strong financial management, knowledge building, learning processes, operational infrastructure, values, organisational culture, and talent (including accessing talent beyond their employees). Willingness and capacity to support organisational strengthening of partners and implement innovative funding models</p>

(Source: Team analysis)

3.2

EMERGING ROLES

Besides these qualities, we also acknowledged that in fulfilling intermediary roles, organisations can play different roles and functions. We used the following resources and further refined the roles based on our interviews:

- [Strengthening the US Conservation Field: A Study of Intermediary Approaches conducted by William and Flora Hewlett Foundation,](#)
- [Centering Equity and Climate Justice Funders guide by Candid and Ariadne](#) and
- [Centring Equity in Intermediary Relationships: An opportunity for funders by Change Elemental](#)

Role	Description
Campaigner	Develop strategy and implement campaigns and programs.
Capacity Enhancer	Extends funders' capacity to connect with work on the ground; increases grantees' programmatic capacity by assuming administrative functions; enables capacity bursts on highly specific issues; and builds grantees' organisational capacity through mentoring and partnering.
Coalition Builder	Provides short- and long-term support to critical groups and strategic coalitions.
Connector	It connects grantees to field intelligence, provides access to people, power, and influence. Delivers connections to organisations, networks, and resources, and helps catalyse relationships between grantmakers and grassroots leaders and organisations.
Convenor	Convenes funders and grantees to coordinate and connect; Convenes grantees around critical milestones and issues; Convenes attention to grassroots-led perspectives.
Field Builder	Builds the field and fosters community connections (e.g. by facilitating peer connections); develops a pipeline of leaders; curates formal and informal learning opportunities for funders and grantees; shifts culture towards greater mutual accountability in the distribution of resources; strengthens the ecosystem; Invests in movement building infrastructure.
Financial Supporter	Acts as grantmaker to provide funding; Acts as fiscal sponsor to provide grant recipient infrastructure; Acts as fundraiser to help bring additional resources to projects
Technical Expert	Compiles and shares specialised knowledge and expertise

There are some additional roles which are critical but were omitted to maintain design integrity in the questionnaire. For completeness, we have shared these here.

Role	Description
Navigator	Presents a unique ability to see and navigate the overlap of philanthropic, political, and NGO spheres. This particularly references understanding domestic and regional sensitivities, including political issues.
Partner	Thought partner to brainstorm ideas; Side-by-side working partner
Strategic Responder	Addresses gaps by filling in skills or capacity in more extensive team efforts; Deploys resources strategically.

In the Self-assessment, we aimed to understand to what extent the different intermediaries we identified added value as capacity enhancers, field builders, connectors, conveners, coalition builders, technical experts, financial supporters, and campaigners.

CONCLUSION



There is an imagined future in which philanthropy could better serve grassroots communities, both in Asia and Latin America and the Caribbean. There also seems to be dialogue fatigue and an urgency for more meaningful conversations, relationships, pilot-driven innovation, and learning. **Based on our engagement with the philanthropic field, there is a critical mass of actors and configurations of actors with whom donors could partner to offer grants and organisational support tailored to local contexts and needs.**

We believe there is a strong interest and readiness to fulfil these intermediary roles. This is evidenced not only by the presence of organisations, networks, and coalitions with diverse intermediary capacities but also by the urgent demand from global majority stakeholders for immediate change. The pandemic helped recognize the reality that community and grassroots-centric actors are and will continue to be best positioned to navigate the complexities of a world driven by climate and environmental effects, social conflicts, new technologies, and other unknowns. It is essential to create, sustain and grow the ecosystem in ways that enable these constituent groups to develop solutions, respond, innovate, fail, and thrive. The sector is being called to experiment more boldly.

Shifting power in philanthropy, however, will be more than finding more locally based intermediaries and channelling funds through them. This might generate an imminent risk of replicating the systems we aim to transform. It will require investing in strengthening capacities and making funding and accountability mechanisms more agile. More deeply, it will require recognizing and acting upon a call to evolve existing roles, building trust and more horizontal collaborations, transforming the language in the field, and even creating space for healing.