



Looking back, dreaming forward: OECD netFWD 10th anniversary

24-25 October 2022
OECD Conference Centre, Paris



Key Takeaways

Day 1. netFWD Education Working Group meeting: *Leveraging philanthropy's collective power to inform education policy*

The OECD's netFWD Education Working Group brings together global leaders in philanthropy, policy makers and experts of the education sector to explore **how foundations can strengthen collaborative efforts both within the philanthropic scene and across the broader global education community** to better inform policies and achieve systems' change.

Philanthropy plays an important role in supporting **quality education** globally. Foundations have been investing in strengthening education systems for many years and, well **beyond funding**, they have been implementing a myriad of strategies to innovate, test and learn on what works in education, thus contributing to the advancement of SDG4 in many areas. For example, foundations are working to **encourage and leverage innovation, applying and enabling a culture of evidence, advocating for change, and providing strategic support** to facilitate access to high-quality education at all levels and ensuring it is equitable. However, foundations face important obstacles in ensuring that the evidence they produce reaches policymaking.

Measuring what really matters

There are many **indicators to measure education systems' performance**, i.e. student enrolment rates and performance outcomes; teacher training and certification. Indicators are normally highly specialised and allow to track system's progress in different areas. However, it is important that education research, practice, and policy take a holistic approach to education problems, keeping in mind the overarching vision laid out in the SDGs. This calls for a **multi-sectorial and multi-generational approach** that allows better understanding on **how systems work and transform as a whole**. This requires also further investing in **education research** that takes into account indicators on the root causes of education challenges.

Enhancing the use of evidence in education policymaking

Foundations are increasingly applying and enabling a **culture of evidence in policymaking**. They are **producing and brokering knowledge** that can inform effective development policy and practice. **Domestic foundations** in particular are bringing valuable experience and relevant knowledge to their local contexts. Foundations can play a role in **driving government's evidence uptake for policymaking** by actively working on the barriers and enablers to a more systematic use of relevant evidence in education policy.

In terms of barriers, an important one is the **lack of capacity across governments to use and uptake research in policymaking**. In addition, **evidence is often inaccessible, too scattered, or too academic**, thus difficult to digest and leverage. Governments often have financial constraints and lack the technical capacity to use and produce evidence and often also fail to see the benefit of using it.

Governments need technical assistance and support to develop their own research capacity. Producing data evidence is not enough, it has to prove useful to policy makers. Thus, foundations need to rethink how they partner and communicate with government from the outset when it comes to research and evidence, and engage in a dialogue and partnership based on the specific issues being researched.

It is necessary to **move from a linear understanding of the research-to-policy models**, whereby research is first developed and its use comes as a second consideration, **towards a systemic approach**, where governmental needs and research priorities are shaped jointly.

The Education Working Group agreed to further explore collectively **how to collaborate within the philanthropic education community and align its work to better support governments in uptaking evidence in policymaking**.

Update on philanthropy's side event at the Transforming Education Summit (TES) and post TES global governance on education

Building on the discussions that took place at philanthropy's high-level event on 18th September 2022, in the margins of the Transforming Education Summit, this session explored **how foundations can strengthen collaborative efforts** - both within the philanthropic scene and across the broader global education community - to contribute to transformation of education in support of Agenda 2030 and beyond.

Close collaboration between foundations and foundation networks is important to make progress towards SDG4. Engaging in **cross-country and cross-sectorial collaborations** will not only decrease fragmentation in the sector but also enable trust between governments, NGOs, policy makers and the foundations helping establish future partnerships.

Participants also discussed the potential contribution of philanthropy to global education outcomes through engagement at the **SDG4-Education 2030 High-Level Steering Committee (HLSC)**, particularly through Functional Area 1, which focuses on evidence-based policymaking, and is co-lead by the OECD Directorate for Education and Skills and UNESCO (HQ and IIEP). The Education Working Group welcomed with interest the proposal to collaborate closely with the OECD Directorate for Education and Skills in the activities of **Functional Area 1**, including its in-country pilots for capacity-building in the use of evidence in policy-making.

Three thematic breakout groups discussed how to advance philanthropy's work to contribute to SDG4 going forward. Three avenues were discussed: (i) South-South lessons learning; (ii) advocacy to enhance support to global education; and (iii) the nexus between evidence and policy. In particular, they agreed on the following topics of interest:

- **South-to-South lessons learning:** common challenges in the South (e.g. reaching remote beneficiaries; overcoming the learning gap after Covid-19, integrating new technologies in education); success

factors for South-South cooperation: building broad stakeholders partnerships; linking to local priorities and local level actors; building capacity at local level.

- **Advocacy to enhance support to global education:** girls' education; climate education; education for refugees; early childhood education and care; education in fragile and post-conflict states.
- **Nexus between evidence and policy:** capacity building for evidence use within foundations and governments (barriers: financial constraints, lack of human resources; lack of incentives; enablers: technical support; training; long-term policy planning).

Participants welcomed the suggestion that the OECD netFWD and IEFG Secretariats join forces and share a proposal on how to take this ambitious agenda forward, leveraging each other's comparative advantages.

Day 2. netFWD 10th Anniversary: “Looking back, dreaming forward”

2022 marks the 10th anniversary of the OECD Network of Foundations Working for Development (netFWD). Hosted by the OECD Development Centre, the Network was created in October 2012 to convene leaders in philanthropy and connect them with policy makers and OECD experts to address the world's most pressing development challenges. The 10th anniversary meeting gathered netFWD members and partners to reflect on evolution of philanthropy's role in the global development community in the last ten years, but also dream forward on how together we can build a brighter future.

Foundations' operating licence is under siege calling for a better acknowledgement by foundations of their social contract and responsibilities that come with it

In the last ten years, **private philanthropy has become an integral part of the development cooperation landscape**. Foundations are providing critical relief to communities that have lost their livelihoods, testing development innovations to address pervasive social challenges, and contributing to produce and broker knowledge that can inform effective development policy and practice. We have seen foundations increasingly seeking to **go beyond palliative solutions to alleviate poverty** and tackle the **structural barriers to economic and social development**. As the priorities of the Sustainable Development Goals come face-to-face with the worst economic recession since the Great Depression, it is more urgent than ever to harness the promise of philanthropy. But are foundations fulfilling their promise?

What sets apart a private foundation from other charitable organisations or other donors is that they have their own (non-public) source of income that gives them extraordinary levels of freedom to contribute to society in the ways in which they feel best fit with their capacities, values and understanding of the most pressing social challenges.

At the same time, **the legitimacy of private philanthropies is premised on a social contract, which includes a tax benefit in return for contributions to the public good**. A recent OECD research confirms that almost every OECD country provides a tax benefit to philanthropies¹. However, the legitimacy of this tax benefit is being increasingly challenged, as philanthropies are often perceived as lacking transparency and as being difficult to scrutinise.

Ways in which foundations can better fulfil their social contract in the next 10 years

Against the backdrop of the current criticism towards philanthropies, how can foundations play a role in society and fulfil their social contract? Four activities are proposed.

First, foundations should **lead the pathway towards solutions that last**. Social issues, such as structural social inequalities and persisting racial inequities, are complex and highly political, and can only be solved by taking a long-term approach which also includes **long-term funding**. Foundations have the long-term horizon that other funders lack, and can thus play a key role to provide long-term solutions to pressing social issues.

Second, foundations should **back innovation and ideas**. Micro-finance, social entrepreneurship, impact investing and participatory budgeting are just a few of the ideas – first supported by philanthropy – that are now global in scope with strong social results.

Third, **foundations should further take risks**. Philanthropic capital is, by definition, risk capital and should be used to support nascent ideas and research, but also to support low-income and fragile communities, going where other funders don't go.

¹ OECD (2020), Taxation and Philanthropy, OECD Tax Policy Studies, No. 27, OECD Publishing, Paris, (<https://doi.org/10.1787/df434a77-en>).

Last, but not least, foundations should use all the above activities with the ultimate intention to **build new fields**. Philanthropies have more freedom to operate than other funders and have a more holistic view of the developments across different fields. By connecting the dots, they can identify innovative approaches, which they can fund through their risk capital. Thanks to this approach, they are pioneers and build entirely new fields.

How did foundations change in the last 10 years?

In the past 10 years the philanthropic sector has experienced **many positive evolutions**. Foundations have become **(i) more focused, (ii) more long-term oriented, (iii) more driven by evidence, (iv) more collaborative in their approaches and (v) have invested in improving measurement**. The “spray and pray” approach is not as common as it used to be, leaving space to a programmatic approach to activities.

There has been a clear shift towards **problem-based philanthropy**, which aligns with the real-life problem of stakeholders. Foundations come together to assess the issues and co-create innovative solutions and share their respective know-how. Thanks to this, philanthropies are building fields, backing innovations and ideas that are rooted in local needs.

Foundations also experimented with **innovative financial instruments and new ways of giving**. Although investing for impact through the endowment is still difficult, foundations are increasingly recognising that ESG investing is the future.

Dreaming forward: Shaping a future agenda for philanthropy and netFWD

What will philanthropy for development look 10 years from now? What role will the netFWD community play? The next decade will likely see three trends that foundations should be aware of.

A first trend will see **foundations playing a more active and open political role** in pressing social issues like racial equity, diversity and inclusion. Foundations will play a key role in bringing forward voices that, so far, have not received much attention and bring pluralism to ongoing debates. This, however, will come at a cost, as foundations will be seen as being more involved in advancing political agendas in an already shrinking civic space.

A second trend will come from US-based philanthropy, which has seen an **upsurge in financing research and science**. According to Shekhtman et al (2022), private philanthropic financing from hundreds of thousands of philanthropic organisations towards science exceeded financing from the National Science Foundation (NSF) and National Institute of Health (NIH) for the first time in 2018-19, and it is likely this mobilisation of resources will very soon lead to new technologies, devices and innovations during the next decade.

The third and final trend will be traced by **foundations from the Global South**. Philanthropy from within **India, China, South Africa, Mexico** and other emerging markets will draw new paths for the sector worldwide. Philanthropy, and philanthropic practices in these countries, will become better understood and recognized by the international community, opening the space for forging additional partnerships.

List of Participants | OECD netFWD's Education Working Group Meeting & 10th Anniversary
24-25 October - OECD headquarters, 2 Rue André Pascal, 75016 Paris

ORGANISATION	LAST NAME	FIRST NAME	TITLE
Aga Khan Foundation	Cunningham	Andrew	Global Lead, Education
Aga Khan Foundation	Frost	Staci	Global Director, Organisational Effectiveness
Apple	Burley	Jamira	Lead Strategic Initiatives, Worldwide Education
Apple	Wiberg	Carolyn	Worldwide Education Strategy
Apple	Patel	Nidhi	WW Education Partnerships, Services, Planning
BHP Foundation	Rose	Faith	Program Director - Education Equity
Bill and Melinda Gates Foundation	Donsimoni	Flora	Interim Head of Southern Europe
British Asian Trust	Thorat-Shah	Abha	Executive Director, Partnerships & Programmes
Centre For Strategic Philanthropy, Cambridge Judge Business School	Banerjee	Shonali	Senior Research Associate
Centre For Strategic Philanthropy, Cambridge Judge Business School	Woodcraft	Clare	Fellow (Former Executive Director)
Children's Investment Fund Foundation	Chilcott	Alice	Analyst
Children's Investment Fund Foundation	Weisert	Linda	Head of Equity, Gender Advocacy & Youth Partnerships
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Community Jameel	Atallah	Dalia	Junior Officer
Community Jameel	Richards	George	Director
Education Cannot Wait	Corlin	Michael	Chief of Finance
Education Cannot Wait	Martyn	Angeline	Private Sector Advisor
Environmental Defense Fund	Mundol	Hisham	Chief Advisor, India
EVPA	Fajour	Sophie	EVPA Corporate Impact Lead
FERDI (Fondation pour les Études et Recherches sur le Développement International)	Angely	Christophe	Special Advisor
Firelight Foundation	Blackwell	Nina	Executive Director
Fondation L'Oréal	Avenel Lam	Pauline	Deputy Director - Inclusive Beauty Programs
Fondation L'Oreal	Balustre	Sylviane	Fund Director
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IEFG - International Education Funders Group	Savage	Laura	Executive Director
Independent	Mattsson	Annina	Strategic Partnerships and Programs Advisor
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Jacobs Foundation	Segura	Fabio	Co-CEO
J- PAL	Brancel	Madeline	Education Policy Manager
J-PAL	Tăbăcaru	Ana	Policy Manager, Europe
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King Khalid Foundation	Princess Nouf Bint Mohammed Bin Abdullah		CEO
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Porticus	O'Malley	Eileen	Global Programme Manager
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Templeton World Charity Foundation	Gatty	Fiona	Principal Advisor for Strategic Relationships and Partnerships
The Draper Richards Kaplan Foundation	Jordan	Lisa	Managing Director
UNESCO	Pellaux	Julien	Director of Partnerships
VVOB	Goldschmidt	Esther	Global Strategic Partnership Advisor
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WAPPP	Von Abendroth	Max	Chair of Philanthropy in PPPs Forum
Waterloo Foundation	Brehmer	Zach	World Development Fund Manager
WHO Foundation	Hulme	Erin	Director of Philanthropy