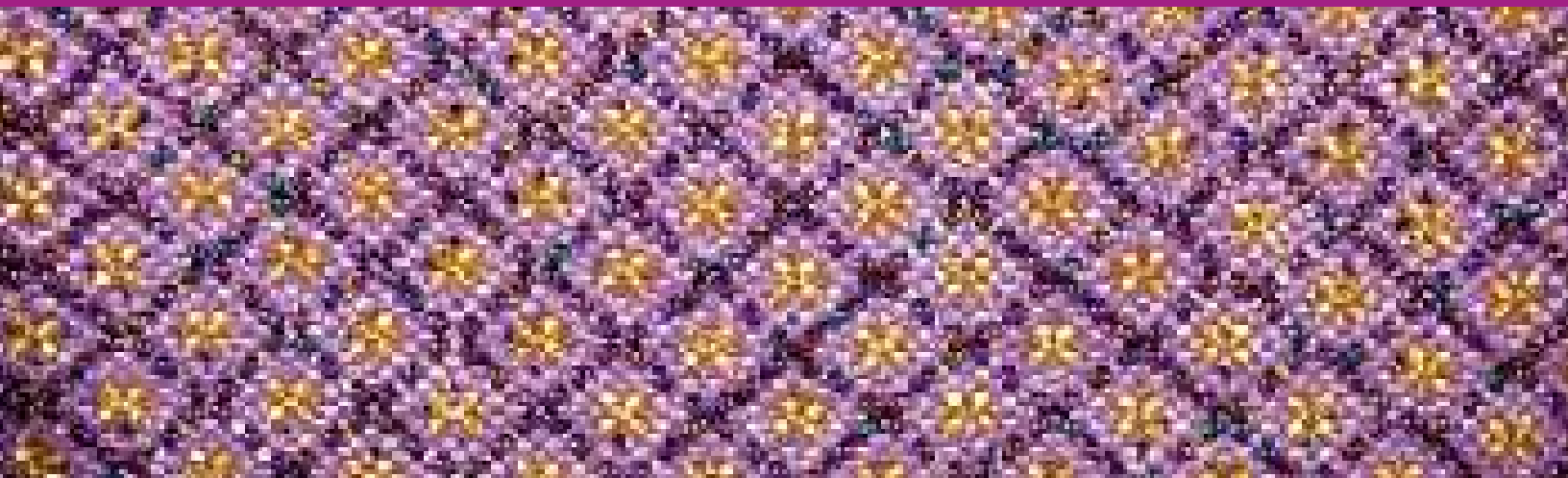


# FROM LOCAL TO REGIONAL

February  
2022

AN ASSESSMENT  
OF FUNDING  
FOR CIVIL SOCIETY  
ORGANIZATIONS AND  
INITIATIVES IN  
LATIN AMERICA  
THROUGH  
NONPROFIT FUNDS



Consultant:  
Liliane Loya

 **HISPANICS IN  
PHILANTHROPY**

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# About Hispanics in Philanthropy

Hispanics in Philanthropy (HIP) is a transnational network of grantmakers committed to strengthening the leadership, voice, and equity of Latinx communities across the Americas. HIP's network connects and brings together grantmakers, civil society organizations, researchers, and other leaders in order to meet the needs of our communities and identify best practices for social change. HIP has been a pioneer in the creation of new models for philanthropy and a leader in initiatives for collaboration among institutional donors. An outstanding effort of theirs is the Funders Collaborative for Strong Latino Communities. Since its creation, HIP has managed multiple grant programs and strengthened the capacity of more than 600 organizations and leaders. In 2014, HIP created HIPGive, the first bilingual and bicultural crowdfunding platform focused on promoting the democratization of philanthropy by using different technologies to keep supporting Latinx social impact projects in the US and Latin America.



## About the author

Liliane Loya is a specialist in philanthropy and social change. She is the founder of INNO–Innovación para la filantropía (Innovation for Philanthropy), an independent consultancy firm aimed at encouraging innovation in the practice of institutional donors and facilitating strategy development through approaches that reduce inequalities and promote horizontal work with civil society organizations and groups.

She was a program officer at one of the main private foundations in the United States and has experience in government and civil society institutions.

Additional information about the author:

<https://inno-soluciones.org/fundadora/>

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# Executive Summary

For years, philanthropy has allocated resources to civil society in Latin America in different ways, including the creation of Funds with various characteristics and approaches. The term “Funds” is used in this document to refer to nonprofit intermediaries created to mobilize and distribute resources. These intermediaries have played an important role in the promotion of social change initiatives in Latin America.

This document is the result of an assessment carried out between September and December 2021 aimed at documenting and understanding more precisely the work of Funds in Latin America. Its main objective is to show the different modalities in which these intermediaries—experts in connecting philanthropy with social activism—operate.



The assessment covered a total of **42 Funds**, including Funds located in Latin America as well as those outside the region that fund the work of civil society in different thematic areas.

## FINDINGS

An analysis of the information gathered led to the following findings:

### **1. Funds created by local actors are frequently able to identify partners those institutional donors have a difficult time finding**

A significant portion of the Funds analyzed were created based on initiatives by people working on the ground: coalitions or activist groups that— together with members of grassroots communities and professionals from different disciplines—joined forces to design solutions for certain issues.

Regardless of the type of organization managing and holding them, these Funds are an integral part of the organization’s mission, i.e., what its founders seek to change in the institutional, socio-cultural, or economic environment.

Funds present in the region, and particularly those created by local actors, know the groups, collectives, and members of initiatives, including those that may have limited global visibility. For this reason, they are in a better position to encourage a more equitable distribution of resources. They are familiar with actors who are relatively unknown by institutional donors, which allows calls for proposals to be more inclusive.

### **2. Expertise on the local context is a core, irreplaceable quality of the Funds**

The expertise of the organizations operating the Funds, i.e., their capacity to analyze and interpret the context, their knowledge on the social actors, and their ability to operate under the regulations of the places where the support will be received, is one of the main reasons why institutional donors seek to collaborate with these intermediaries. As an essential part of this expertise, the intermediaries do the due diligence necessary to identify potential partners that will receive the grants.

Additionally, they understand the legal and fiscal frameworks of the countries where their partners operate.

Their other essential roles include maintaining a close proximity to the ground and direct communication with communities and population groups for whom the resources are intended.

### **3. The ecosystem of organizations benefits from the long-term efforts of the Funds**

The main role of most Funds, particularly those that arise from local initiatives, is to contribute to the sustainability of their partners and the continuity of their work.

The support they provide for people, communities, and organizations is long-term, and their thematic support efforts are far more stable than those of large donors. Therefore, they help to cushion the effects of constant change in the thematic priorities of large private foundations.

### **4. Geographic proximity and horizontal work models based on listening to the partners are important**

Being close to local actors, contexts, and dynamics is a key part of the work of the organizations that operate the Funds, regardless of their structure or legal incorporation. Overall, geographic proximity can pose a challenge for the Funds, and organizations have devised ways to respond to it by using different channels to come together.

In some cases, they connect through mentors: people who live and work in the region for which the support is intended and who have a relevant track record with the communities and local actors. Besides geographic proximity, flexible communication adapted to the partners is an essential condition for the efficacy of the Funds. In some work models, organizations appoint members of their staff as liaisons for communication with their partners.

### **5. Foundations located outside Latin America are the main source of resources**

Most of the resources gathered by the analyzed Funds come a) from foundations located in the United States and Europe and b) from multilateral and bilateral agencies, while donations from companies and individuals represent quite a lower proportion.

### **6. Partnerships between Funds facilitate better access to resources**

Collaboration between Funds, by means of partnerships or networks, is an increasingly common strategy. One of the main advantages of establishing partnerships is the increased possibility of accessing philanthropic resources. There are four additional reasons why the Funds set up collaboration networks:

1. They make collective learning possible.
2. They can more strategically position an issue in national or global agendas.
3. They focus resources on population groups in specific circumstances.
4. They align strategies with Funds and organizations from other regions.

## **7. With some exceptions, Funds located in Latin America face major bureaucratic and legal barriers.**

Although they are meant to facilitate the flow of resources from grantmakers and international cooperation to nonprofit initiatives, national legal frameworks use up considerable resources from organizations in terms of staff hours and contracted professional services.

In certain countries, excessive bureaucracy and exaggerated requirements not only reflect an inefficient tax or collection system, but also create a direct form of state control over civic engagement and collective work in those countries.



## Introduction

This document is the result of an assessment of over forty Funds that support civil society initiatives in Latin America, hereinafter the “Funds.” For the purposes of this assessment, “Funds” refers to the **nonprofit mechanisms or vehicles that pool resources from donors and allocate them to civil society initiatives.**

The work was carried out due to Hispanics in Philanthropy (HIP)’s interest in providing institutional donors in the region with information about the different modalities that exist to finance civil society initiatives.

For almost four decades, HIP has encouraged more investment in Latinx organizations and communities in the United States. Particularly in 2000, HIP played a key role in the creation of the Funders Collaborative for Strong Latino Communities,<sup>1</sup> a series of collaborative Funds that work to strengthen Latinx organizations in the United States. Since its formation, the initiative has shown that investing in the capacities of Latinx organizations is a powerful way to contribute to the development of their communities.

By means of this mechanism, institutional donors have helped more than 500 nonprofit organizations improve their organizational systems, hone the skills of their personnel, and become more strategic and sustainable.

“Philanthropy allows civil society to grow and become democratized. It can also be a strategic instrument for social change if it is linked to the causes, problems, actors, regions, and approaches that promote this change.”

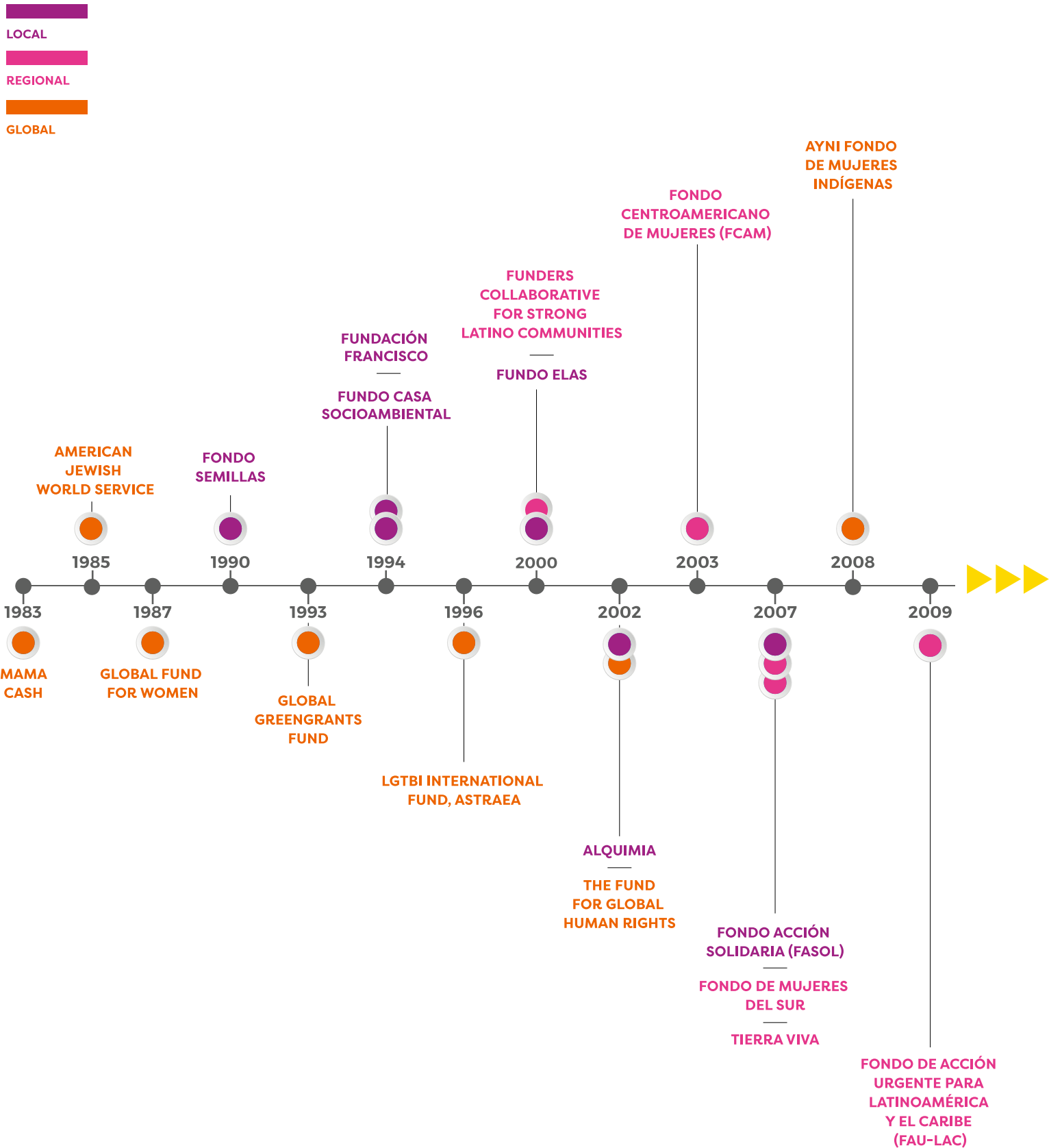
*Diagnostic of corporate philanthropy in Mexico (Alternativas y Capacidades, 2008).*

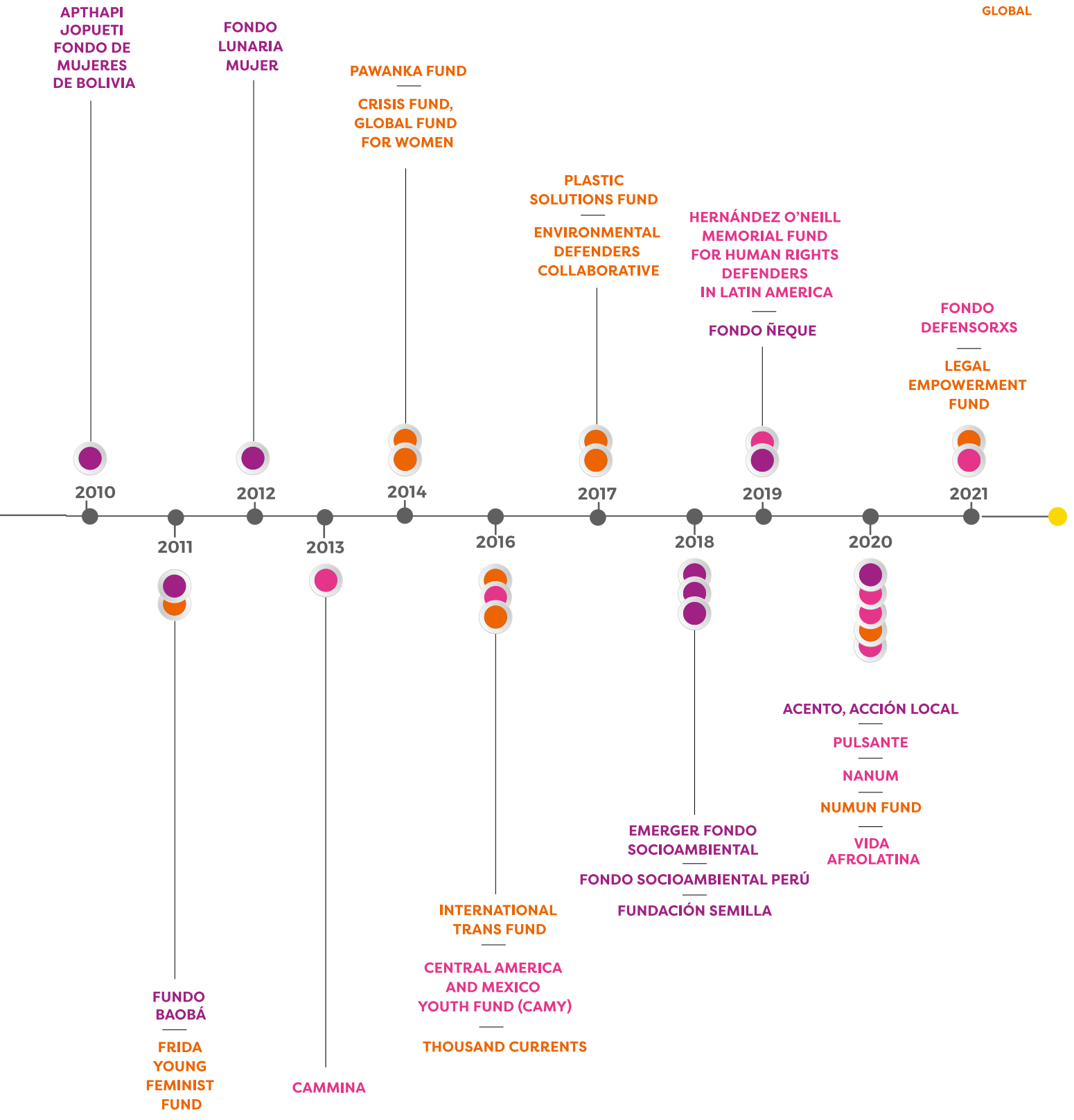
The information gathered encompasses Funds that were created between the 1980s and 2021. The earliest Funds identified were founded not by grantmakers but by groups of activists involved in social movements, such as feminist or environmental justice movements, that were seeking to attract resources in different countries.

Between 1983—the year when the first Fund identified was created—and 2021, two moments of significant resource proliferation stand out. The first moment takes place between 2008 and 2013, while the second goes from 2018 to 2021 and will possibly last two or three more years as a result of the crisis brought about by COVID-19 and increased awareness of the ethnic, racial, and gender-based inequality that prevails in the political, economic, and cultural systems.

<sup>1</sup> The [Funders Collaborative for Strong Latino Communities](#) has raised \$45 million and supports civil society organizations that provide services for Latinx communities in 16 regions of the United States.

# Image 1. Timeline: year when the Funds analyzed were created





The assessment allowed us to become familiar with the different ways in which Funds are organized and to document the characteristics of each model, including the objectives for which they were created, the actors who created them, and the main funding sources.

This work is organized into four parts. The first part explains the methodology used in the assessment; the second part lays out a typology based on the identified characteristics; and the third part presents findings obtained from the analysis on the Funds that support civil society. Part four offers recommendations for philanthropic institutions interested in promoting social change initiatives in Latin America.

## I. Methodology



The methodology included consulting various sources, such as institutional reports and websites of the organizations and institutions that operate the Funds, as well as conducting twenty interviews with representatives from nonprofit organizations; business networks; private, community, and public foundations; and specialists in philanthropy and civil society from nine countries.<sup>2</sup>

The assessment was not exhaustive. **42 Funds were identified** and both national and regional Funds were taken into account, as well as some global Funds that are important examples because of the ways in which they were created and how they incorporate local actors into their decision-making. The document seeks to be as inclusive as possible, according to the criteria defined at the beginning of the study. Below are the criteria and considerations that determined the scope of the assessment:

**Some of the Funds identified are not necessarily entities with their own legal status and are hosted by different types of organizations.**

The Funds, according to the definition adopted for this assessment, are different from institutional donors with their own endowment (i.e., a Fund is not a foundation, although it may well be housed by one). Funds are housed in institutions constituted under different legal categories, such as private foundations with their own endowment or civil associations.<sup>3</sup> While several Latin American countries have legal categories that distinguish foundations from other nonprofits, foundations are basically associations in which one of the legal entities that is part of said association contributes its equity to achieve the legal purpose of the association.<sup>4</sup> The fact that some associations include the term “foundation” in their official names, although they are not foundations, leads to some confusion.

<sup>2</sup> The full list of interviews can be found in Annex 2.

<sup>3</sup> The term “association” or “civil association” is synonymous with nonprofit organizations in most Latin American countries. An entity is recognized as such when a group of people decides to undertake an activity for the greater good or a non-for-profit activity of public interest. In general, they are classified by civil codes or similar legislations as private legal persons. See glossary in Annex 3.

<sup>4</sup> The legislation in Argentina, Peru, and Guatemala, for instance, does confer a particular legal figure to foundations as nonprofit associations with their own capital. Mexico, on the other hand, does not recognize a specific legal figure for foundations.

A significant number of the identified Funds that operate from the United States were constituted as **public foundations**, i.e., institutions that, unlike **private foundations**, are authorized to raise funds from the public.

### **The study focuses on social change Funds, not humanitarian assistance Funds.**

We included Funds located both in Latin America and outside it whose purpose was to contribute to **social change**: those supporting local partners or organizations that seek to transform social, political, and cultural institutions and norms in order to improve conditions for marginalized communities or population groups.

### **The non-for-profit nature was another key criterion.**

Only nonprofit Funds were taken into account, i.e., contributing institutions that do not receive any kind of return for their support. Donor-advised funds (DAFs) were excluded, as were impact investment or patient capital funds and entities granting any type of loan, regardless of the purpose of the association.

In general, Funds used by philanthropy to respond to natural disasters or economic or political crises in the region were not considered.<sup>5</sup> Funds held by international organizations or public government agencies were also excluded from the study.

## **II. Funds: main characteristics and typology**



We identified a diverse range of Funds to document for this assessment—so much so that attempting to create a comprehensive typology proved difficult. In addition to operating at local, regional, and global levels, the Funds have important differences depending on whether they were created by groups of activists, for example, or by institutional donors in the global North.

The following characteristics serve as the basis for the assessment's typology.

### **1. Geographic focus**

Geography is undoubtedly a factor that determines access to resources and explains certain disparities that exist among the Funds.

<sup>5</sup> Some examples of this type of Funds are the Clinton Foundation Haiti Fund, which sought to respond to the humanitarian emergency caused by the 2010 earthquake in that country; the Fund for economic recovery created as part of the peacebuilding efforts in Colombia, "Investing for Peace," funded by the United States Agency for International Development (USAID); and the funds to respond to the immediate effects of the COVID-19 pandemic, such as the Community Response Fund in Chile. These Funds are set up to meet humanitarian needs, but they do not aim to change the structures or institutions that create exclusion, i.e., they are not conceived to promote social change.

**Image 2. Funds analyzed according to the geographic area in which they operate**



**Global Funds** may have local representation, but they are without exception based in countries in the global North. This means, generally, that global Funds have more resources than Funds based in Latin America due to certain structural advantages. Local Funds have less visibility with donors from the global North and fewer sources of support to turn to in the face of constant thematic or strategic changes that take place among donors. Additionally, the economic, political, and social contexts in which they carry out their activities are not usually favorable, and in some countries may even be adverse.

In recent years, with the rise of authoritarian systems and weak democracies, regulatory frameworks have become more restrictive and have negatively affected the Funds' ability to operate. Over the past two decades, the surveillance of financial systems around the world has increased, and higher administrative and material costs have been imposed on the operation of nonprofit Funds.

Although organizations in the global North are not without risk of suffering the effects of these restrictions, the impact on their operations tends to be much lower than that felt by local and regional Funds. Finally, the COVID-19 pandemic and the economic crisis it precipitated have posed additional challenges for organizations operating in Latin America.

It is essential for funders to understand local contexts so that they can effectively meet the needs of the organizations and populations that receive their support. A current trend in philanthropy is to take the time to learn and understand local dynamics in depth. Additionally, many large donors are becoming more open (at least publicly) to inviting local groups and communities to participate in decision-making, including decisions on how and for what the resources are used. These practices are in fact not new in philanthropy: they have been used by community foundations all along.

### **Community Foundations**

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gather economic, material, and human resources to fund community initiatives in the geographic areas where they are located. They are important actors in some Latin American countries—such as Mexico and Brazil—and, in recent decades, donors from the global North have found in their model a useful vehicle to transfer resources that benefit grassroots groups.<sup>6</sup>

Community foundations can be transformative mechanisms for attracting, gathering, and allocating resources; furthermore, they serve as bridges between philanthropic, business, and community actors.

<sup>6</sup> The Inter-American Foundation and the Charles Stewart Mott Foundation, among others, are two of the main institutional grantmakers of the community philanthropy movement in Latin America.

The community foundation model for mobilizing resources by grassroots organizations or community groups has gained global recognition in recent decades, as it allows communities that receive the support to also contribute their own resources, whether they are material or human. In most cases, this model strengthens civic engagement where it operates.

In this assessment, it was not possible to document the variety of strategies that coexist in community foundations, largely because the distinctive features of their model and the ways in which they operate make them worthy of their own in-depth analysis.<sup>7</sup>

Unlike community foundations, the Funds often struggle with geographic proximity, and organizations operating Funds have developed innovative strategies to meet this challenge. In some cases, they connect to the communities in the field through mentors: people who live and work in the region for which the support is intended, and who have a relevant track record and are trusted by the local communities.

That is the case of [Fondo Acción Solidaria \(FASOL\)](#) and its mentor network. Mentors support implementation of the initiatives that receive the funds, and they foster and encourage connections among the groups that receive the support and other groups and organizations inside and outside the region.

In some cases, local Funds have had a regional vision since their creation, while others have dabbled in work beyond the borders of a country due to the issues on which they work. For example, the [Central American Women's Fund \(FCAM\)](#), established in Nicaragua to connect philanthropy with feminist initiatives in Central America, was created with a regional vision at a moment when philanthropic resources from the global North were mainly focused on South America and Mexico.

Some local Funds have played the role of regional promoters of “sibling” Funds. A good example is [Fundo Casa Socioambiental](#) in Brazil, which was created to encourage conservation and environmental sustainability work to connect with social justice efforts. At first, the organization worked with a regional vision that was fostered in part because it supported communities established on the Amazon basin, which includes territories of five countries, so it was essential for the organization to run the Fund with a regional focus. In recent years, the introduction of a significant tax on bank transfers, among other restrictions, led the Fund to stop supporting initiatives outside Brazil. However, it currently implements a regional-scope strategy through which it transfers knowledge and capacities to other, newer Funds in the region.

<sup>7</sup> Some sources on community philanthropy and the work of community foundations are Comunalía (<https://comunalia.org.mx/>) and Global Fund for Community Foundations (<https://globalfundcommunityfoundations.org/what-we-stand-for/community-philanthropy/>). Accessed on December 12, 2021, at: [https://comunalia.org.mx/portfolio\\_page/como-transfiere-el-poder-la-filantropia-comunitaria/](https://comunalia.org.mx/portfolio_page/como-transfiere-el-poder-la-filantropia-comunitaria/).





“We share our model with socio-environmental activists in other countries of the region. That is how we constantly share everything we have learned....the contract-management models, administration.... We have also introduced [those young funds] to donors. Besides being part of the emerging partnership, what these activist funds have in common is that they understand that the populations most affected by environmental challenges are at the same time those that have been excluded, their rights have been constantly violated, and they are the least visible ones for philanthropy.”

**Amália Souza,**  
**Fundo Casa Socioambiental**



## 2. Thematic approach and specific demographic

In general, Funds focus on certain topics and population groups based on their interest in an issue in the first place and, in the second place, on their geographic focus.



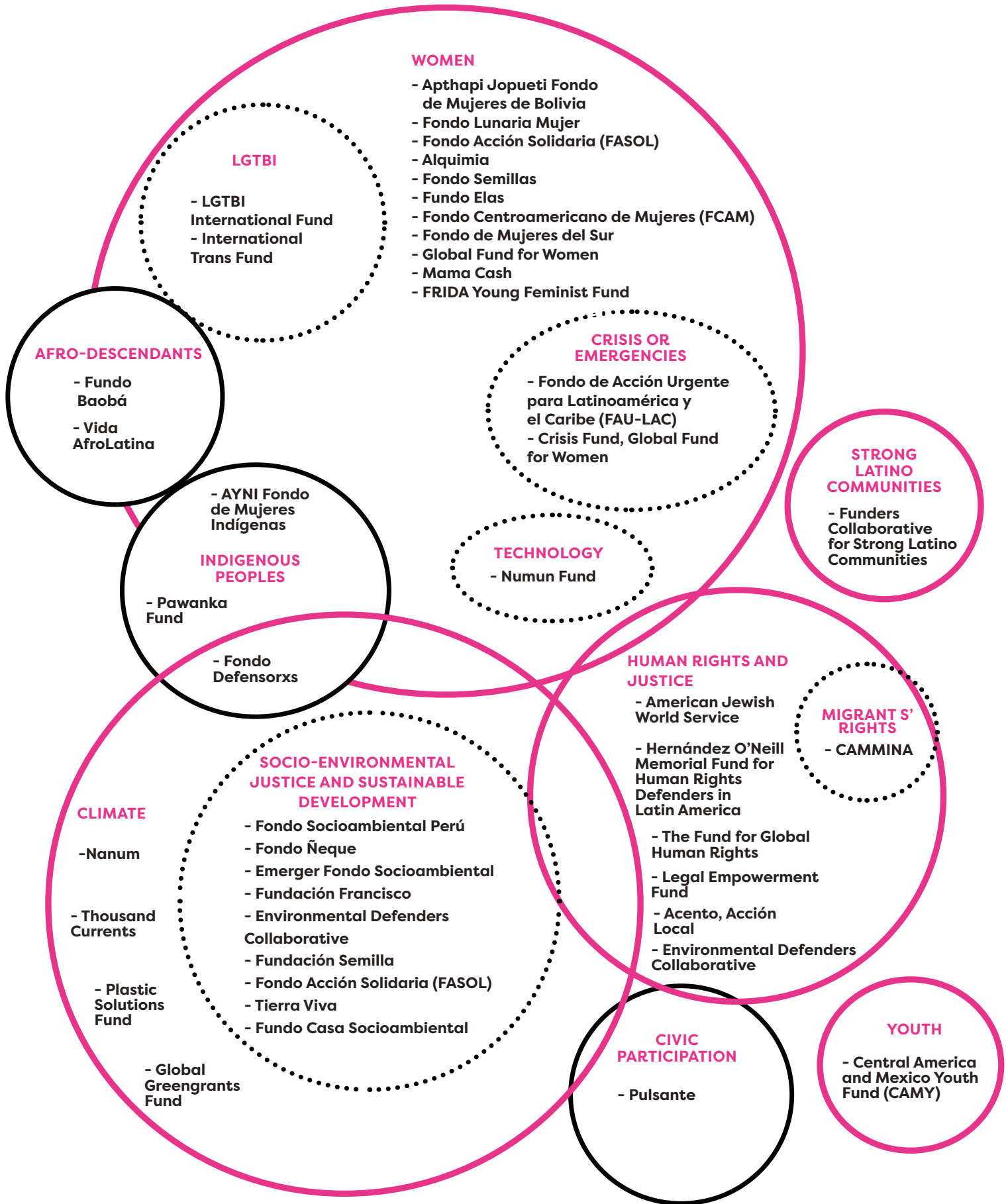
Most Funds that focus on a population cover a wide range of topics. That is to say, initiatives that receive support are diverse in terms of content, and they are not subject to predefined guidelines or topics.



“Existing regional funds are anchored in the thematic sphere. A fund with no thematic, regional focus will have no traction, because strategies are first and foremost thematic. Avina has also learned that the interest of donors is thematic first and then territorial.”

**Valeria Scorza, Fundación Avina**

**Image 3. Funds organized by issue area and population groups**



In some cases, organizations that started a Fund with a thematic approach have also defined a specific population group in response to issues that affect them. A recent example can be found in **The Christensen Fund**, which has supported efforts to protect biological and cultural diversity in five regions of the world for decades and, in 2019, decided to specifically support Indigenous peoples as the main actors in the protection of biodiversity. This decision led to the creation of Fondo Defensorxs, which will focus on supporting Indigenous peoples and movements in exercising their rights. It will begin operating in Mexico and other countries of the region starting in 2022.

Other Funds aimed at supporting a population group and focused on a specific issue were established earlier, such as [Fundo Baobá](#), which promotes racial equity in Brazil (focused on Afro-descendants), and [Fondo de Acción Urgente de América Latina y el Caribe \(FAU-LAC\)](#), which provides rapid-response mechanisms for women activists and defenders under threat. Among all the Funds analyzed, FAU-LAC comprises the largest number of countries, including all of Latin America and the Spanish-speaking Caribbean.

### 3. The actors that create the fund

Broadly speaking, the Funds explored in this assessment were established in one of two ways: by the decision of one (or several) grantmakers, or by means of a collective decision by activists working in the field.<sup>8</sup>

<sup>8</sup> While they are not part of this assessment, there are also Funds created at the behest of governments, whether at a regional level, such as [Fondo para el Desarrollo de los Pueblos Indígenas de América Latina y el Caribe](#), or at a national level, such as the environmental conservation Funds of the countries of the region. Most of them are grouped in the [Red de Fondos Ambientales de Latinoamérica y el Caribe \(Network of Latin American and Caribbean Environmental Funds\)](#). While a significant number of these Funds are part of non-governmental entities, most of them were created by decrees or laws, as in the case of Fondo MARENA in the Dominican Republic, or through government agreements such as those of Mexico, El Salvador, and Paraguay.

**Image 4. Funds analyzed according to the type of actors that created them**



## ● Funds established by institutional donors

Funds in this category include those set up by institutional donors, whether independent, public,<sup>9</sup> or corporate foundations. This category also includes **collaborative Funds**, in which case the decision to make a grant is the result of an agreement reached by two or more donors. In recent years, both private foundations and governmental aid agencies have used this form more frequently.<sup>10</sup> These Funds usually have a short lifespan, as their duration is subject to donors' changing priorities.

In many of these examples, those who provide the initial capital to establish the Fund do not necessarily host and operate it. For several of the identified Funds, donors established them and delegated their operations to a third party. This assessment identified three types of entities that run collaborative Funds: fiscal sponsors, philanthropy-serving organizations (PSOs), and foundations.<sup>11</sup> Some examples of this model include [Pulsante](#), created by the Luminate, Open Society, and Avina foundations (and operated by the latter) in order to promote the expansion of civic space in Latin America; and the [Legal Empowerment Fund](#),<sup>12</sup> which is operated by [The Fund for Global Human Rights](#) and helps communities and grassroots organizations adopt legal strategies for social and environmental justice.

Collaborative Funds implement additional strategies that go beyond fundraising and transferring resources in the form of grants. Strategies include conducting research, advocacy, and providing capacity-building activities for the organizations on the ground.

## ● Funds as products of local initiatives

The second form of Funds documented, regardless of who provides the resources, are those that have been created by **local actors** including activists, researchers, leaders in their field, and members of civil society organizations and communities.

These local actors generally join efforts to develop collective work strategies and methods to raise funds and distribute them among other actors working for the same cause. Most Funds analyzed in this assessment were created in this manner, as in the case of the women's Funds of the region,<sup>13</sup> including [Fondo Centroamericano de Mujeres \(FCAM\)](#) and [Fondo de Mujeres del Sur](#). This is also how [Fundo Brasil](#) and the socio-environmental Funds in different countries were created.<sup>14</sup>

<sup>9</sup> In the United States tax system, a public foundation is a nonprofit organization that is authorized to request funds from the general public. The Global Fund for Women and Global Greengrants Fund are examples of this type of foundation.

<sup>10</sup> Johnson, P.D., 2018.

<sup>11</sup> There are also funds held by international organizations, which were not part of the assessment.

<sup>12</sup> Created in 2021, the Legal Empowerment Fund was the result of the collaboration among the Charles S. Mott Foundation, the William & Flora Hewlett Foundation, and The Fund for Global Human Rights in partnership with three organizations. The Fund will run for ten years; the possibility to continue will depend on the evaluation conducted by the institutions that make it up at the end of this period.

<sup>13</sup> There are currently eight Women's Funds in Latin America. See list at: <https://www.prospera-inwf.org/#!/-latin-america/>, accessed on November 18, 2021.

<sup>14</sup> The socio-environmental Funds documented are: Fondo Semilla in Bolivia, Fundo Casa Socioambiental in Brazil, Emerger Fondo Socioambiental in Colombia, Fondo Ñeque in Ecuador, Fondo Tierra Viva in Honduras (with a Central American work scope), Fondo Acción Solidaria in Mexico, and Fondo Socioambiental del Perú.

In most of the Funds created under this model, the financing comes from the organization that hosts them and, while fundraising and distributing resources is a key part of their work, it goes well beyond that. In general, the organizations that operate these Funds have their own agenda, with a vision about the problem they want to solve, and conduct programs and campaigns related to the focus of their work.

Some Funds located outside the region were created due to a need to build channels between, and pool resources from, different sources for a common purpose. An example of this model is the Funders Collaborative for Strong Latino Communities, developed by Hispanics in Philanthropy (HIP) and focused on strengthening the organizations that support Latinx communities and have Latinx leadership in different regions of the United States. It was established to increase funding to nonprofit Latinx organizations.<sup>15</sup>

## ● Grantmaker participation schemes

In addition to the typology described above, the assessment looked at the degree of donors' involvement in decision-making processes related to the operation of the Fund. We found that a significant number of Funds have an autonomous governance model in which institutional donors do not participate, although they sometimes define certain basic criteria to provide the resources.

Organizations operating Funds with this model can decide how they want to distribute resources and select grant recipients, as they are the result of the collective decision of those who serve as a bridge between philanthropy and grassroots groups.

In this model, organizations operating the Fund usually have a Board of Directors consisting of members unrelated to the donor, which ensures a high degree of autonomy. With some of the Funds created by grantmakers, such as [Baobá](#) in Brazil and [Acento Acción Local](#) in Mexico, the organization operating each Fund is in charge of decision-making, independent from the foundations that created them and contributed resources.

Some global Funds were also created by activists, similar to the local Funds. [The Plastic Solutions Fund](#),<sup>16</sup> [Global Greengrants Fund](#), and [the Astraea Foundation International Fund](#) are examples.

<sup>14</sup> Hispanics in Philanthropy. (n.d.). *Funders Collaborative for Strong Latino Communities*. Accessed on December 10, 2021, at: [https://www.learningtogive.org/sites/default/files/handouts/Funders\\_Collaborative\\_for\\_Strong\\_Latino\\_Communities.pdf](https://www.learningtogive.org/sites/default/files/handouts/Funders_Collaborative_for_Strong_Latino_Communities.pdf).

<sup>15</sup> The Fund was created in 2016 after a meeting in Tagaytay, the Philippines. Participants in the meeting included activists, scientists, and members of environmental organizations under the auspices of the Oak and Marisla foundations. That historic meeting resulted in a strategy that would guide the [emerging movement](#) to reduce the production, use, and consumption of plastic at a global scale, of which Plastic Solutions Fund would be a key part.

In other cases, donors get directly involved in decisions about how to distribute resources and select partners. An example is the Central America and Mexico Migration Alliance (CAMMINA), created by the Ford, Avina, and Open Society foundations, which set up a Fund to support civil society organizations. In its first years of operation (2012–2015), CAMMINA’s decisions about which projects to support were the result of deliberations among the three institutions. Eventually, however, the partnership model changed and, in 2018, it became a program operated by Hispanics in Philanthropy, which is in charge of selecting the grant beneficiaries.

### **Participatory models**

In participatory grantmaking models, the decision-making body involves people with first-hand experience, i.e., members of the communities or populations that will be supported. The [Pawanka Fund](#) is an example: its steering committee is made up of leaders of the global Indigenous movement, and they make decisions on projects and initiatives led by Indigenous groups and organizations from seven socio-cultural regions. This model is becoming popular in philanthropy, and Funds in the region are likely to start adopting it.

**Image 5. Typology of the Funds included in the assessment**

**Created by institutional donors**

LOCAL	REGIONAL	GLOBAL
<ul style="list-style-type: none"> <li>● Acento, Acción Local (MacArthur Foundation)</li> <li>● Fondo Baobá (Kellogg Foundation)</li> </ul>	<ul style="list-style-type: none"> <li>● CAMMINA (Hispanics in Philanthropy)</li> <li>● Central America and Mexico Youth (Seattle International Foundation)</li> <li>● Fondo Defensorxs (The Christensen Fund)</li> <li>● Hernández O’Neill Memorial Fund for Human Rights Defenders in Latin America</li> <li>● Nanum (Fundación Avina)</li> <li>● Pulsante (Fundación Avina)</li> </ul>	<ul style="list-style-type: none"> <li>● Legal Empowerment Fund</li> <li>● LGBTI International Fund (Astraea Foundation)</li> <li>● Numund</li> </ul>

**Created by activist groups and local actors**

LOCAL	REGIONAL	GLOBAL
<ul style="list-style-type: none"> <li>● Fundación Francisco</li> <li>● Fondo Brasil</li> <li>● Women’s Funds:             <ul style="list-style-type: none"> <li>- Apathi Jopueti in Bolivia</li> <li>- Elas in Brazil</li> <li>- Alquimia in Chile</li> <li>- Lunaria Mujer in Colombia</li> <li>- Semillas in México</li> </ul> </li> <li>● Socio-environmental Funds             <ul style="list-style-type: none"> <li>- Fundación Semilla in Bolivia</li> <li>- Fondo Casa Socioambiental in Brazil</li> <li>- Fundación Tierra Viva in Central America</li> <li>- Emerger Fondo Socioambiental in Colombia</li> <li>- Fondo Ñeque in Ecuador</li> <li>- Fondo Acción Solidaria in México</li> <li>- Fondo Socioambiental del Perú</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Fondo Centroamericano de Mujeres</li> <li>● Fondo de Acción Urgente para Latinoamérica y el Caribe</li> <li>● Fondo de Mujeres del Sur</li> <li>● Funders Collaborative for Strong Latino Communities</li> <li>● Vida AfroLatina</li> </ul>	<ul style="list-style-type: none"> <li>● American Jewish World Service</li> <li>● AYNI Fondo de Mujeres Indígenas</li> <li>● Environmental Defenders Fund</li> <li>● FRIDA Young Feminist Fund</li> <li>● Global Fund for Women</li> <li>● Global Greengrants Fund</li> <li>● International Trans Fund</li> <li>● Mama Cash</li> <li>● Pawanka Fund</li> <li>● Plastics Solutions Fund</li> <li>● The Fund for Global Human Rights</li> <li>● Thousand Currents</li> </ul>



### III. Main findings



#### 1. Funds created by local actors have the ability to identify partners much more easily than institutional donors do.

Most of the Funds analyzed in this assessment were created by activist groups that—together with community groups and professionals from different disciplines—joined forces to design solutions for certain issues. Regardless of the entity that hosts and operates them, these Funds initially defined their goals and then formulated strategies that would help them achieve it. The decision of how to allocate resources falls on those who run the initiative, not on the institutions that granted the funds.

Secondly, some Funds were established based on contributions from one or two main philanthropic institutions, which generally delegated the decision on how to distribute the resources to a third party. Most of these Funds were created to address a specific issue, location, or population group. Examples in this category include [Acento](#), created with initial capital from the MacArthur Foundation in Mexico; [Fundo Baobá](#), started by the Kellogg Foundation in Brazil; and [Pulsante](#), established by the Luminare, Open Society, and Avina foundations for Latin America.



“It is still difficult for different actors to understand what the funds do. However, there starts to be an understanding that there are advantages [in getting resources to the partners] by means of funds: they have an added value, as they understand the context; they can navigate the regulatory frameworks; they are closer to the movements; and they know the groups—in fact, in many cases, we are part of the movements. We don’t only transfer the money; our goal is that counterparts come together and become stronger.”

**Tania Turner, Fondo Semillas**



FONDO SEMILLAS  
MUJERES SEMBRANDO IGUALDAD

Another common Fund model we identified is one that corresponds to a program within an institutional donor, and which might appear to consist only of resources earmarked for a specific topic. Actually, this type of Fund is an important instrument for directing more resources to a specific topic or issue, because raising the profile of certain topics in the global agenda can encourage contributions from additional grantmakers. Fondo Defensorxs (The Christensen Fund) and the Global Fund for Women’s [Crisis Fund](#) are examples of this model.

Funds that are based in the country in which they work, and particularly those that were created by local actors, know the groups, collectives, and communities, regardless of their public visibility. For this reason, they can encourage more equitable distribution of resources: they are connected to actors that may be unknown to institutional donors, which allows for more inclusive calls for

## 2. Expertise on the local context is one of the Funds' core advantages.

The expertise of the organizations operating the Funds—i.e., their capacity to analyze and interpret the context, their knowledge of local actors, and their ability to operate under the regulations of the places where the support will be received—is essential to donors. Due diligence work<sup>17</sup> is a critical part of their expertise and one of the Funds' main functions. Without exception, organizations that operate Funds fulfill that role in addition to identifying potential grantees. Additionally, these organizations have technical knowledge on the legal and fiscal frameworks of the countries in which the partners operate, and they usually have the capacity to manage resources to promote dialogue and learning exchanges among grantees.

Finally, the Funds' proximity to the local communities and population groups for which the resources are intended are a key contribution and make them real experts on the work on the ground.

## 3. The ecosystem of organizations benefits from the long-term efforts of the Funds.

Funds are able to understand what it takes for communities and organizations to reach important milestones in their line of work. Those created by activists, especially, know that providing long-term funding for the people, communities, and organizations they support is one of their highest priorities. The constant fluctuation of thematic priorities in private foundations and bilateral aid agencies creates great instability for organizations and activists working on the ground.



“One of the biggest challenges is the volatility of financing. This means that funds do not have guaranteed multi-year financing, and private foundations oftentimes change programs or directions and leave intermediary funds at risk of not being able to sustain their annual budgets.”

**Laura García, Global Greengrants Fund**



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<sup>17</sup> The due diligence work may vary from one institution to another; however, it generally refers to the process by which a donor (or a third party subcontracted by the donor) goes over an organization's record to become acquainted with its financial, organizational, and legal compliance. Due diligence has different meanings depending on where the donor is located, and the practice of due diligence is very developed among institutional donors in the global North. For an explanation on the term and practice, see: Grantmakers for Effective Organizations. (n.d.). *What Does Effective Due Diligence Look Like?* Accessed on November 3, 2021, at: <https://www.geofunders.org/documents/1368>, and NGOSource. (2020). *Due Diligence in Grantmaking. Part 1.* Accessed on November 14, 2021, at: <https://www.ngosource.org/blog/due-diligence-in-grantmaking-part-i>.

The strategies of organizations running the Funds change less often, because they obtain resources from different sources and have the ability to act as buffers against the effects of the frequent changes by large donors. The Funds' priorities are neither static nor permanent; however, changes are less frequent and are likely to contribute to the partners' sustainability and the continuity of their work.

While the term "intermediaries" is frequently used to refer to these Funds, their role goes beyond transferring resources. They offer consultancy and technical assistance services to their partners, promote the creation of networks, and support discussions and exchanges among the grantee partners and other actors.

Most of these Funds operate capacity development programs that are tailored to their partners' needs. What guides their programs is ensuring the continuity of their partners' work. They know that resources alone, without support for enhancing organizations' capacity, are unlikely to ensure their partners' sustainability.



"We see that creating regional linkages is necessary. Regional discussions on different topics that go beyond their local contexts are necessary. For example, climate change is an issue that affects the region, and dialogue [among partners] and advocacy strengthening processes at a regional level are needed."

**Valeria Scorza,**  
**Fundación Avina**



#### **4. The key to the Funds' work is not only geographic proximity, but horizontal work models based on grantees' input.**



"The closer to the local sphere we are, the better we can respond. That is one of the important matters that we took into account when we shared the Casa model with local leaders in Bolivia, Colombia, Ecuador, and Peru."

**Amália Souza,**  
**Fundo Casa Socioambiental**

Proximity to local actors, contexts, and dynamics is a key element of the work of the organizations that run the Funds, regardless of their structure or legal status.

Besides geographic proximity, active communication is an essential condition for the efficacy of the Funds. While it is clear that the use of technology is relevant, organizations running the Funds explain that the ability to adapt to the rhythm and frequency of interaction that their partners need is even more important.



Local contexts are particular, and that particularity must be understood so that the support truly matches the needs of the organizations and communities that receive it. Moreover, the Funds' grantees are often grassroots groups often without a recognized legal status, whose work demands flexibility and adaptation.

Regardless of their location, the organizations running the Funds find ways to understand local needs as well as possible. Mechanisms are diverse, but there are consistent factors that facilitate recognizing those needs and building trust: speaking and understanding the partners' language, sharing cultural codes and references (or at least becoming familiar with them), and acknowledging the power differential in the relationship and working to reduce it. The ability to work within these contexts lies in actively listening to the partners' perspectives and needs throughout the support and follow-up processes.



“Something that has worked for us is to explicitly be very sensitive to the partners’ timing and needs. That is to say, we do not have a standard relationship with them. Our relationships are based on building enough trust for each organization to set the pace for us in terms of the intensity of the interaction. [...] For example, there are organizations with which we have had the required basic communication (because that is their wish), and others that have asked us to support them several times, also for [additional] matters.”

**Sylvia Aguilera,**  
**Acento Acción Local**

## **5. Foundations located outside Latin America are the main source of funding.**

Reviewing<sup>18</sup> the origin of the resources administered by the Funds, we found that they mainly come from foundations located in the United States and Europe<sup>19</sup> and, secondly, from multilateral agencies and international assistance from developed countries, while donations from companies and individuals represent quite a lower share.<sup>20</sup>

The minimal and sporadic participation of private companies is not surprising. According to what we were able to document, their limited involvement is explained by a combination of factors.

<sup>18</sup> The information on the origin of the resources managed by the Funds was obtained through interviews and publicly available information, without analyzing the Funds' financial statements.

<sup>19</sup> Given that the survey is not exhaustive, this conclusion is a generalization that may not be accurate if the universe of Funds to be considered is expanded.

<sup>20</sup> In some cases—clearly a minority—the Funds receive resources from government programs in the country in which they operate.



“Companies don’t like to be seen only as money donors. It is important to recognize that they have other things to contribute, especially [the experience of] the foundations that they [the companies] have created. In order to involve them, it is necessary to recognize complementarities [and to identify] what they can bring to the table. It is necessary for them to be included in the design, and not just get there when things are done.”

**Margareth Flórez, RedEAmérica**



**A second factor** is private companies’ preference for financing initiatives that are far removed from the structural changes that the Funds and their beneficiary organizations seek to promote. Given that very different structures and priorities coexist among companies and business foundations, it is difficult to show the predominant traits without falling into generalizations. Nonetheless, the vast majority tend to support areas that are not considered controversial, such as education, microcredit for food production, and some environmental conservation projects. Initiatives to promote, for example, the democratic participation of traditionally excluded groups or efforts to promote social change are unlikely to attract them.

**First**, there is little incentive for companies operating in the region to delegate control over grantmaking to a third party, when they have their own foundations. Channeling support through their own institutions allows them to decide where that support goes, which will give their brand greater visibility. This does not mean that private companies are entirely reluctant to collaborating with donors outside the region through a Fund, but, among other things, companies would have to be involved in the design.



“Latin American philanthropy has not gone for some complex and sensitive issues. It bets on education, on income generation. Environmental issues draw less attention, although this area has growth potential. Democracy and human rights lend themselves to polarization: for one part of society, these are not serious issues, and it is not easy to find national donors.”

**Rodrigo Villar, CIESC**



**CIESC**  
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Many corporate foundations continue to practice traditional philanthropy, which consists of providing immediate, humanitarian aid. But a growing number of them are becoming interested in fostering community, economic, and social development. These companies have committed themselves to sustainable development strategies, ranging from fair trade practices to strategies to include impoverished groups in their products' supply chains. For example, the companies and business foundations that make up RedEAmérica<sup>21</sup> recently decided to focus on inclusive purchases. This initiative focuses on proactively including local suppliers in their supply chains as a means to benefit the communities in their geographic region. The concept is directly aligned with the participating companies' strategies, and the incentives, are both to demonstrate their commitment to local development and to learn from peers how they have integrated local suppliers successfully.

The preference for supporting actions in a clear geographic area is a **third factor** that could explain the relative absence of corporate resources in nonprofit Funds. For businesses and their foundations, the prospect of contributing to a Fund that is outside where their markets are located is not very appealing. Most are concerned with projecting a positive image for the communities in their areas of influence. Naturally, their interest in contributing support is determined in large part by the geographic location of their markets.

Despite the challenges in drawing local business philanthropy to a regional vision, this strategy can help raise visibility of a specific issue. One lesson drawn from this assessment is that the creation of thematic Funds results in a greater positioning of a particular issue on the global and regional philanthropy agenda. That role of thematic Funds is highlighted by philanthropy experts.



“...a function of creating collaborative partnerships] is to ‘pave the way’ in philanthropy; it [...] is partly to show that there is interest in a certain topic, [to be able to] show that progress is being made. The example was what was done with the support of the Inter-American Foundation in the region: the goal was to promote community-led development. The way was to identify the foundations that were already working on the issue, talk to them, bring them together, and look at the possibilities. And they began to build the network with a lot of participation.”

**Rodrigo Villar, CIESC**



<sup>21</sup> [RedEAmérica](#) is a business network that brings together more than 60 companies in 12 countries, with the aim of promoting among its members practices that encourage the sustainable development of communities in regions defined by the companies themselves.

## 6. Partnerships between Funds facilitate better access to resources.

Collaboration between Funds, by means of partnerships or networks, is an increasingly frequent strategy at the local and regional levels. Whether formally constituted (as a partnership with its own operating rules and decision-making bodies) or not, partnerships help increase access to resources. Some of the additional functions that benefit their members include:



“When it comes to purposes other than humanitarian aid, mobilizing local resources is a struggle, but it is necessary.”

**Laura García,**  
**Global Greengrants Fund**



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- **Transferring knowledge and engaging in collective learning processes**, i.e., learning from other partners' expertise. For example, through the [Alianza Socioambiental Fondos del Sur](#), which brings together nine socio-environmental Funds from the global South, the longest-running Funds share lessons with newer Funds in Bolivia, Colombia, Ecuador, and Peru. The Alliance also facilitates connections with overseas foundations and international aid agencies.
- **Positioning an issue on the national or global agenda**. In recent years, multiple networks of Funds have emerged that have increased the visibility of various issues. This has attracted the attention of both grantmakers and decision-makers within governments and corporations. Arrecife<sup>22</sup> in Mexico is an example of a national-level network, while Prospera<sup>23</sup> and Global Alliance for Green and Gender Action<sup>24</sup> are global networks that seek to increase the visibility of women's Funds and boost women's leadership in environmental justice work, respectively.
- **Directing resources to specific populations in response to natural disasters or other emergencies**. For example, at the beginning of the COVID-19 crisis, [Aliança entre Fundos](#) was formed in Brazil, comprising the [Baobá](#), [Brasil do Direitos](#), and [Casa Socioambiental](#) Funds to support Quilombola and Indigenous peoples in coping with the pandemic.
- **Aligning strategies with Funds and organizations from other regions**. The On the Right Track<sup>25</sup> network, for instance, is the result of the joint efforts of Latin American and European feminist Funds to respond to the far-right conservative movements that seek to restrict women's sexual and reproductive rights.

<sup>22</sup> Arrecife is a coalition of Mexican organizations that promotes a greater culture of philanthropy in Mexico and seeks to encourage increased funding for grassroots community initiatives in socio-environmental and economic justice.

<sup>23</sup> Prospera is an international network that currently groups 44 Women's Funds in more than 177 countries. See: <https://www.prospera-inwf.org/#/!/-10-para-los-fondos-de-mujeres/>.

<sup>24</sup> Fondo Centroamericano de Mujeres (FCAM) manages the Global Alliance for Green and Gender Action (GAGGA), with contributions from Both ENDS and Mama Cash, as well as the World Resources Institute (WRI). See: <https://gaggaalliance.org/es/>

<sup>25</sup> See: <https://www.fcmyjeres.org/en/who-we-are/>

These networks and partnerships have different degrees of operability, and their structures vary according to the resources available and the degree of interest that their partners (in this case, the Funds) take in these structures. Without these partnerships, it would be more difficult to create pathways for exchange and learning, or to have collective representation before private donors and international aid agencies.

The Latin American and Caribbean Network of Environmental Funds, for example, has been a source of learning that enhances the work of its members:



“REDLAC<sup>26</sup> has a wealth of practices and documents that can be shared as tools to replicate the model [of biodiversity conservation funds] in other countries. It is an organization that allows for learning among the funds and, in addition to its connecting role, it has a visionary role and identifies emerging issues and challenges.”

**Eglé Flores, Biodiversity Funders Group**

## **7. With some exceptions, Funds based in Latin America face major bureaucratic and legal barriers.**

Most of the Funds operating in Latin America are part of nonprofit institutions, regardless of the official term ascribed such organizations under each country’s legislation.<sup>27</sup> In addition to the laws that prohibit terrorism financing, in many countries the legislation imposes a significant tax on transnational bank transfers. This prevents Funds that operate locally from transferring resources to initiatives in other countries. With few exceptions, the high cost of these barriers tends to diminish rather than facilitate regional action by Funds established in Latin American countries.

National legal frameworks, far from facilitating the flow of resources from donors and international cooperation to nonprofit initiatives, constitute one of the main obstacles that use up many organizations’ staff hours and contracted professional services. In some countries, excessive bureaucracy and exaggerated requirements not only reflect an inefficient tax or collection system, but also create a direct form of state control over the forms of civic engagement and collective action allowed in those countries.



“Anti-money-laundering legislations impose many obstacles on nonprofits and philanthropic organizations [because] donations are identified as ‘vulnerable activities’ by these laws. And new restrictions by authoritarian regimes have made it more difficult.”

**Michael Layton,  
Dorothy A. Johnson Center for Philanthropy**



<sup>26</sup> Latin American and Caribbean Network of Environmental Funds. See: <https://redlac.org/>

<sup>27</sup> Reviewing legal frameworks was not part of this assessment. The International Center for Nonprofit Law has an important collection of the legal frameworks that govern the activities of the different nonprofit entities in Latin American countries. See: <https://www.icnl.org/our-work/latin-america-and-the-caribbean-program>



## IV. Recommendations



### 1. Make existing Funds visible to donors.

The infrastructure that makes it possible for resources to reach civil society actors in Latin America is vast and diverse. Strengthening it requires knowing how that infrastructure is created and the role played by each organization, Fund, or network of Funds. Each channel used to deliver resources has strengths and weaknesses and responds to particular contexts. Entities with experience collaborating with different types of donors and actors in the region, such as HIP and Fundación Avina, have the capacity to observe and evaluate in which contexts it is necessary to strengthen the links between actors or strengthen the organizations and networks that participate in the collection and allocation of resources.

### 2. Devise ways to steadily connect local Funds with actors within and outside the region, particularly the Latin American diaspora.

In recent years, efforts have been made to connect the Latin American diaspora, especially those living in the United States, with philanthropic work in the region, most of which channel resources to humanitarian response projects.<sup>28</sup> However, there are few initiatives that connect the diaspora with Funds focused on social change initiatives, such as gender justice, protection of human rights defenders, or environmental justice.

This may be because they are not aware of the social change Funds in the region. It could also, however, be because there are no secure channels for contributions, or because trust in the organizations located in the countries of origin is lacking. It is probably a combination of all these factors. What is certain is that this situation represents an area of opportunity.



“Connecting national or sub-regional funds with the resource pool of the diaspora would add great value to the ecosystem. An actor such as HIP could become the channel that links existing funds with funding sources, including the diaspora. This would not require the creation of other funds.”

**Laura García,**  
**Global Greengrants Fund**



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<sup>27</sup>Two examples found are: [Give to Colombia](#), a nonprofit organization constituted in the United States that channels resources to projects related to education, health, nutrition, and training for entrepreneurs who want to start or grow their small business; and [Brazil Foundation](#), which pools resources from individual and corporate donors for multiple purposes, such as fighting famine and providing emergency humanitarian support for the population groups most affected by COVID-19.

The COVID-19 pandemic proved that interconnection between regions that previously seemed distant is possible. Phenomena such as migration flows or certain political developments, like the weakening of democratic systems in Latin America, could lead to greater interest from the diaspora in supporting civil society social change efforts in the region.

Organizations with transnational structures and work are in a favorable position to connect the Funds, civil society in the region, and parts of the diaspora.

### **3. Invest more resources in the Funds as an explicit strategy to reduce inequalities.**

Local and regional Funds are able to distribute resources among actors that are generally off the radar of major donors. They know the environment and have a track record and reputation that allows them to connect with groups and networks that are less visible to the outside world. These are groups that, despite not being formally constituted or registered as required by their country's legislation, carry out essential work for local communities and populations. This characteristic is not incidental, but the result of a consistent effort to relate to partner organizations in a horizontal manner, to build trust, and to appreciate the norms that govern actions and relationships in local environments. It is a job that requires talent, as well as considerable time. By connecting less visible local groups and community networks with outside funding sources, the Funds help counteract the inequitable distribution of resources by which institutional donors often benefit the large, more established organizations with greater access to philanthropic resources.

There is a common impulse among institutional donors to want the entities that manage the Funds to use only the lowest possible percentage of the resources. The share that is used by Funds for operational costs is an important investment, and organizations should not be “punished” for doing so. These resources help finance the Funds, which then help to reduce inequality between the more established and visible organizations that receive financing easily and those that do not.



“In the midst of the crisis, we have not stopped getting resources. We have been able to raise funds for new topics....but that would not be enough [if it were not for] grantmakers who have given us flexible support for operating expenses. [...] That allowed us to be prepared to face this context. Grantmakers [need to understand the importance of] not limiting the percentage of this type of expenses.”

**María Estelí González,  
Fondo Centroamericano  
de Mujeres**



There are structural disparity patterns in philanthropy that have been documented and made known through data collection efforts by different organizations. For instance, [the Human Rights Funders Network & Candid](#) initiative was able to show, through the analysis of data provided by more than 800 foundations, that the amount of flexible funding that philanthropy gives to organizations in the global North is far greater than that given to organizations in the South.

This affects the potential of organizations in charge of operating Funds in the global South and places them in a vulnerable position to respond to the basic needs of their partners. Ensuring that data collection initiatives will have long-term resources to continue information processing and analysis work is vital for the identification of trends in philanthropy that bring about disparities.

Similarly, these initiatives have made it possible to make issues or social or demographic groups with less access to philanthropic resources more visible. These assessments open up opportunities for people in philanthropy to ask what forces keep specific groups from accessing philanthropic resources, and to determine whether these challenges can be solved within the existing structure of philanthropic actors or if addressing to political, legal, or socio-cultural barriers is necessary.



“[Women’s Funds] aim is supporting organizations in a sustained way, at least for four or five years. The [grants provided by] major donors are generally for two years or three years maximum... [and therefore there is] a great disparity with the way Funds work.”

**Laura Leonelli Morey,**  
**Fondo Mujeres del Sur**

#### **4. Contribute to a more favorable regional environment for philanthropy’s support to support civil society.**

The context in which the ecosystem of civil society organizations, grassroots groups, and philanthropic institutions operates faces strong restrictions that threaten its continuity. The bureaucratic obstacles imposed by a growing number of Latin American governments reduce the likelihood of greater contribution from citizens, companies, or donors. Restrictions on receiving resources from abroad and laws aimed at exercising control over activists and social leaders prevent the smooth operation of funding mechanisms for civil society. Different foundations and aid agencies recognized the need to face these restrictions and are carrying out different strategies. In 2016, [Funders’ Initiative for Civil Society](#) was created as a global effort to help reduce the main barriers to civic engagement, including restrictions that governments justify on the basis of national security and combating terrorism.

Another example is [Enabling Environment for Philanthropy](#), a WINGS initiative funded by the European Union. Supporting strategies that address restrictions on civil society activities should be a priority for institutional donors to protect social change initiatives' access to resources.

## 5. Invest in the sustainability of the Funds.

Gaining access to medium- and long-term resources from philanthropy is one of the Funds' main challenges. Single-year grants limit their basic operational capacity and prevent them from offering the kind of support their partners require, especially in adverse economic and political environments.

To help maintain the crucial role of Funds, it is necessary to invest resources, with a long-term approach, on strengthening their capacity to advise, accompany, and provide financial support to partners.

Institutional donors should invest in building the capacity of the organizations running the Funds. It is naïve to think that these entities can respond effectively and perform the functions expected from them without the necessary investments in human and technological resources. Providing long-term support allows the Funds to offer the added value for which donors seek them out: to be connected with the work on the ground and to respond quickly to the needs of the partner organizations.



# ANNEXS

## **Annex 1.**

Funds included in the assessment

## **Annex 2.**

Interviewees

## **Annex 3.**

Glossary

## **Annex 4.**

Sources

## Annex 1.

### Funds included in the assessment

	Fund	Institution	Local/ Regional/ Global	Country/ Region	Topic / population groups	Year	Web
1.	Acento, Acción Local	Acento, Acción Local	Local	Mexico	Social justice and human rights	2020	<a href="https://acento.org/">https://acento.org/</a>
2.	Apthapi Jopueti Fondo de Mujeres de Bolivia	Apthapi Jopueti Fondo de Mujeres de Bolivia	Local	Bolivia	Women	2010	<a href="http://www.fondodemujeresbolivia.org.bo/index.php">http://www.fondodemujeresbolivia.org.bo/index.php</a>
3.	Emerger Fondo Socioambiental	Emerger Fondo Socioambiental	Local	Colombia	Sustainable development / Social environmental justice	2018	<a href="https://www.facebook.com/EmergerSocioambiental/">https://www.facebook.com/EmergerSocioambiental/</a>
4.	Fondo Acción Solidaria (FASOL)	Fondo Acción Solidaria (FASOL)	Local	Mexico	Sustainable development / Social environmental justice	2007	<a href="https://www.fasol-ac.org/">https://www.fasol-ac.org/</a>
5.	Fondo Lunaria Mujer	Fondo Lunaria Mujer	Local	Colombia	Women	2012	<a href="https://fondolunaria.org/">https://fondolunaria.org/</a>
6.	Fondo Semillas	Fondo Semillas	Local	Mexico	Women	1990	<a href="https://semillas.org.mx/">https://semillas.org.mx/</a>
7.	Fondo Socioambiental Perú	Fondo Socioambiental Perú	Local	Peru	Sustainable development / Social environmental justice	2018	<a href="https://fondoperu.org.pe/">https://fondoperu.org.pe/</a>
8.	Alquimia	Fundación Colectivo Alquimia	Local	Chile	Women	2002	<a href="https://www.fondoalquimia.org/">https://www.fondoalquimia.org/</a>
9.	Fondo Ñeque	Fundación Ñeque	Local	Ecuador	Sustainable development / Social environmental justice	2019	<a href="https://www.instagram.com/fundacionneque/">https://www.instagram.com/fundacionneque/</a>
10.	Fundación Francisco	Fundación Francisco	Local	Brazil	Sustainable development / Social environmental justice	1994	n.d.
11.	Fundación Semilla	Fundación Semilla	Local	Bolivia	Sustainable development / Social environmental justice	2018	<a href="https://www.instagram.com/semilla_bolivia/">https://www.instagram.com/semilla_bolivia/</a>
12.	Fundo Baobá	Fundo Baobá	Local	Brazil	Racial Equity	2011	<a href="https://baoba.org.br/">https://baoba.org.br/</a>
13.	Fundo Casa Socioambiental	Fundo Casa Socioambiental	Local	Brazil	Sustainable development / Social environmental justice	1994	<a href="https://casa.org.br/es/">https://casa.org.br/es/</a>
14.	Fundo Elas	Fundo Elas	Local	Brazil	Women	2000	<a href="http://www.fundosocialelas.org/">http://www.fundosocialelas.org/</a>
15.	Fondo Centroamericano de Mujeres (FCAM)	Fondo Centroamericano de Mujeres (FCAM)	Regional	Central America	Women	2003	<a href="https://www.fcwmujeres.org/es/">https://www.fcwmujeres.org/es/</a>
16.	Fondo de Acción Urgente para Latinoamérica y el Caribe (FAU-LAC)	Fondo de Acción Urgente para Latinoamérica y el Caribe	Regional	Latin America & Hispanic Caribbean speaker	Rapid response for women defenders and activists at risk	2009	<a href="https://fondoaccionurgente.org.co/">https://fondoaccionurgente.org.co/</a>
17.	Fondo de Mujeres del Sur	Fondo de Mujeres del Sur	Regional	Argentina, Paraguay, Uruguay	Women	2007	<a href="https://www.mujeresdelsur.org/">https://www.mujeresdelsur.org/</a>
18.	Hernández O'Neill Memorial Fund for Human Rights Defenders in Latin America	The Fund for Global Human Rights	Regional	Latin America	Human rights defenders	2019	<a href="https://globalhumanrights.org/">https://globalhumanrights.org/</a>
19.	Pulsante	Fundación Avina	Regional	Latin America	Civic participation / Expansion of civic space	2020	<a href="https://pulsante.org/">https://pulsante.org/</a>
20.	Nanum	Fundación Avina	Regional	Bolivia	Climate change adaptation	2020	<a href="https://acdi.org.ar/proyectos/nanum/">https://acdi.org.ar/proyectos/nanum/</a>

21.	Tierra Viva	Fundación Tierra Viva	Regional	Central America	Sustainable development / Social environmental justice	2007	n.d.
22.	CAMMINA	Hispanics in Philanthropy	Regional	Central America & México	Human rights of migrants	2013	<a href="https://cammina.hiponline.org/es">https://cammina.hiponline.org/es</a>
23.	Funders Collaborative for Strong Latino Communities	Hispanics in Philanthropy	Regional	United States	Capacity Building of Latinx Organizations	2000	n.d.
24.	Central America and Mexico Youth Fund (CAMY)**	Seattle International Foundation	Regional	Central America & México	Youth	2016	<a href="https://camyfund.org/en/">https://camyfund.org/en/</a>
25.	Fondo Defensorxs	The Christensen Fund	Regional	Latin America	Social environmental justice and indigenous defenders	2021	<a href="https://www.christensenfund.org/">https://www.christensenfund.org/</a>
26.	Vida AfroLatina	Vida AfroLatina	Regional	Latin America	Afro-descendant women/Sexual violence	2020	<a href="https://es.vidaafrolatina.org/">https://es.vidaafrolatina.org/</a>
27.	American Jewish World Service (AJWS)	American Jewish World Service (AJWS)	Global		Human rights and Social environmental	1985	<a href="https://ajws.org/">https://ajws.org/</a>
28.	LGTBI International Fund	Astraea Lesbian Foundation for Justice	Global		Gender justice and LGBTI people	1996	<a href="https://www.astraeafoundation.org/apply/international-fund/">https://www.astraeafoundation.org/apply/international-fund/</a>
29.	AYNI Fondo de Mujeres Indígenas	AYNI Fondo de Mujeres Indígenas	Global		Indigenous women	2008	<a href="https://fimi-iiwf.org/fondo-ayni/">https://fimi-iiwf.org/fondo-ayni/</a>
30.	Global Fund for Women	Global Fund for Women	Global		Women	1987	<a href="https://www.globalfundforwomen.org/">https://www.globalfundforwomen.org/</a>
31.	Crisis Fund, Global Fund for Women	Global Fund for Women	Global		Rapid response in natural disasters or conflicts	2014	<a href="https://www.globalfundforwomen.org/what-we-do/crisis-fund/">https://www.globalfundforwomen.org/what-we-do/crisis-fund/</a>
32.	Environmental Defenders Collaborative	Global Greengrants Fund	Global		Social environmental justice	2017	<a href="https://www.greengrants.org/edc/">https://www.greengrants.org/edc/</a>
33.	FRIDA Young Feminist Fund	FRIDA Young Feminist Fund	Global		Women and feminist movements	2011	<a href="https://youngfeministfund.org/es/">https://youngfeministfund.org/es/</a>
34.	Global Greengrants Fund	Global Greengrants Fund	Global		Social environmental justice	1993	<a href="https://www.greengrants.org/">https://www.greengrants.org/</a>
35.	International Trans Fund	International Trans Fund	Global		Trans people	2016	<a href="https://www.transfund.org/?lang=es">https://www.transfund.org/?lang=es</a>
36.	Mama Cash	Mama Cash	Global		Women and feminist movements	1983	<a href="https://www.mamacash.org/es/el-activismo-feminista-funciona">https://www.mamacash.org/es/el-activismo-feminista-funciona</a>
37.	Pawanka Fund	Pawanka Fund	Global		Indigenous populations	2014	<a href="https://www.pawankafund.org/">https://www.pawankafund.org/</a>
38.	Plastic Solutions Fund	Rockefeller Philanthropy Advisors	Global		Environment / Reduction of the use of plastic	2017	<a href="https://plasticsolution.org/">https://plasticsolution.org/</a>
39.	The Fund for Global Human Rights	The Fund for Global Human Rights	Global		Human rights	2002	<a href="https://globalhumanrights.org/">https://globalhumanrights.org/</a>
40.	Legal Empowerment Fund	The Fund for Global Human Rights	Global		Human rights and legal empowerment	2021	<a href="https://globalhumanrights.org/legal-empowerment/">https://globalhumanrights.org/legal-empowerment/</a>
41.	Thousand Currents	Thousand Currents	Global		Social environmental justice/ food sovereignty	2016	<a href="https://thousandcurrents.org/">https://thousandcurrents.org/</a>
42.	Numun Fund ***	Women Win	Global		Technology in support of feminist activists	2020	<a href="https://numun.fund/">https://numun.fund/</a>

\* The Central American countries in which it operates are: Belice, El Salvador, Guatemala, Honduras and Nicaragua

\*\* The Latin American countries in which it operates are: El Salvador, Guatemala, Honduras and Mexico

\*\*\* The Latin American countries in which it operates are: Colombia and Mexico

● Table 1. By Liliane Loya

### Interviewees

- **Amália Souza**  
Fundo Casa Socioambiental
- **Artemisa Castro**  
Fondo Acción Solidaria
- **Atieno Odhiambo**  
Legal Empowerment Fund
- **C. R. Hibbs**  
The Robert H. N. Ho Family Foundation
- **Eglé Flores**  
Biodiversity Funders Group
- **Gabriela Boyer**  
Inter-American Foundation
- **Julio Copo Terrés**  
Mañón Quintana Abogados/Consejero de Hispanics in Philanthropy
- **Laura García**  
Global Greengrants Fund
- **Laura Leonelli Morey**  
Fondo de Mujeres del Sur
- **Margareth Flórez**  
RedEAmérica
- **María Estelí González**  
Fondo Centroamericano de Mujeres
- **Michael Layton**  
Dorothy A. Johnson Center, Grand Valley State University
- **Rodrigo Villar**  
Centro de Investigación y Estudios sobre Sociedad Civil
- **Stephany Girón**  
Fondo Centroamericano de Mujeres
- **Sylvia Aguilera**  
Acento, Acción Local
- **Tania Turner**  
Fondo Semillas
- **Tatiana Amor**  
The Christensen Fund
- **Tatiana Fraga Diez**  
Comunalia
- **Traci Romine**  
Charles Stewart Mott Foundation
- **Valeria Scorza**  
Fundación Avina



### Glossary

- **civil society organization or association**

In this assessment, the term is used to indicate any private entity that engages in non-for-profit activities. It is equivalent to “non-governmental organization” and “third-sector organization” and refers to groups of citizens and members of society, regardless of each country’s legal terminology.
- **corporate foundation**

This type of foundation is created by enterprises. While the foundation is legally independent from the enterprise that created it, it does depend financially on said business. Besides, the directors of the enterprise usually sit on the foundation’s board or decision-making body.
- **community foundation**

Organization comprising members of a community whose objective is to mobilize resources from multiple sources, including contributions from its members, in order to tackle issues or cover needs in the community itself.
- **donor advised funds (DAF)**

Vehicles created by American legislation for donors to receive tax deductions where the money is not necessarily allocated for public benefit purposes (this is known as “charitable giving”). Because of this characteristic, they have been severely criticized by an important sector of philanthropy and non-profit organizations in the United States.
- **foundation**

Broadly speaking, the term refers to any non-profit association with its own capital created for a common purpose, although certain characteristics vary depending on each country’s legal framework. In some legislations, making donations is recognized as the core function or activity of foundations, but not in all cases.

There are different types of foundations, such as independent foundations (with their own endowment), community foundations, business foundations, and family foundations.
- **funds**

Non-for-profit mechanisms or vehicles that capture resources from grantmaking institutions and allocate them in order to support civil society initiatives. They are also known as “intermediary institutions.”
- **independent foundation with its own endowment**

Non-profit organization with its own capital, which usually comes from a single main source, whether it is a natural person, a family, or a company. Hence, private foundations are of different types, mainly business or corporate foundations, independent foundations, and family foundations. These different figures are not necessarily reflected in legislations.

In the US system, private foundations, unlike public foundations, are not authorized to raise funds from the general public.
- **institutional donors**

Entities that grant (donate) resources to individuals or civil organizations in order to help promote a social cause.
- **partners**

The term refers to both organizations and activists and community groups not formally constituted that implement initiatives and benefit from the support granted by funds or grantmaking institutions.
- **public foundation**

Non-profit organization that is authorized to request and obtain funds from the general public and whose assets, therefore, usually come from different sources. This type of foundation exists in the tax system in force in the United States.
- **social change**

Sociology term used to characterize changes in the forms of human interaction that *transform social institutions, cultural norms, and behavioral patterns*. These changes take place over a considerable period of time and usually have profound consequences for a society. In history, these changes have occurred at a global, national, or regional level and have modified structures that seemed immovable. Some examples are the abolition of slavery and the recognition of the rights of LGBTBI populations in countries of the global North.

## Annex 4.

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# FROM LOCAL TO REGIONAL

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