

Global Philanthropy Data Charter



About WINGS

The Worldwide Initiatives for Grantmaking Support (WINGS) is a network of over 150 philanthropy associations and support organizations in 56 countries around the world. WINGS strengthens, promotes and provides leadership on the development of philanthropy and social investment around the world. WINGS gives voice to the many cultures of giving and provides its members and other participants with information, knowledge, and peer exchange. Our vision is of a strong global philanthropic community that strives to build more equitable and just societies around the world.



Funders

We would like to thank WINGS' funders for all their support, in particular the C&A Institute in Brazil that provided funding for the Global Philanthropy Data Charter project.



www.wingsweb.org
Email: info@wingsweb.org
Tel: +55 11 30787299

Address:
Av. 09 de Julho, 5143, cj 61.
Sao Paulo – Brazil. 01407200

Contents

1 Introduction	2
2 Context and Purpose	3
2.1 Background	3
2.2 The Challenge	4
2.3 Purpose of the Charter	4
3 The Charter: A Commitment to Data on Philanthropy	5
3.1 Vision	5
3.2 Values	5
3.3 Principles	6
3.4 Core Benefits of Coordinated Data Collection	6
4 Ensuring Successful Implementation	8
5 Stakeholders	9
6 Signatories	10
7 Appendices	11
Appendix 1 - How the Charter was Developed	11
Appendix 2 - Next Steps to Implementation	11

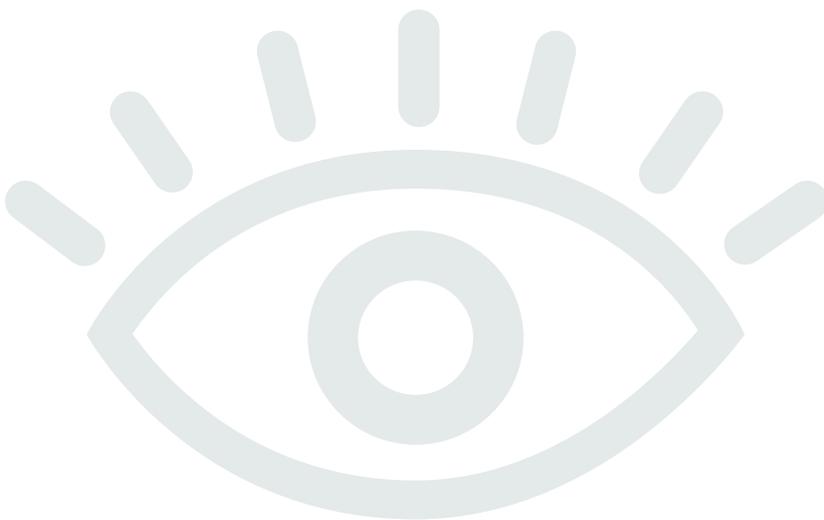


1 Introduction

Philanthropy plays an increasingly large and visible role in societies around the globe. It addresses human suffering, promotes social justice, and supports a broad range of civil society goals and organizations. Its freedom to experiment enables it to direct private resources to social issues in innovative and flexible ways. As philanthropy grows around the world, maximizing this impact becomes not only a shared vision for the sector, but also an imperative – highlighting the importance of giving smartly and of continuously searching for approaches that deliver the best outcomes.

There is widespread belief that access to readily available, high-quality data will improve philanthropy's efficiency, influence and impact. Consistent and reliable data helps donors to establish strategies on what, where, and how much to invest. Organizations working on similar issues, locally or across borders, can share important insights into what works, and so better coordinate efforts towards maximizing impact in the pursuit of specific goals. Most importantly, philanthropy's ultimate beneficiaries will gain the most from improved data. Most importantly, the ones who will gain most from the benefits improved data bring to philanthropy are the constituencies foundations reach through their activities.

To realize this vision of improved data for deeper philanthropic impact, WINGS and a team of experts from around the world propose the adoption of a Global Philanthropy Data Charter. The Charter is intended to act as a framework to guide organizations in the sector as they set out to improve philanthropy data, while acknowledging the diversity of context, culture, and legal framework within which these organizations operate. It proposes both a code of good practice to improve the working relationship of those involved in philanthropy data – data users, providers and collectors – and also a framework for engaging other sectors (governments, corporations, academia, and civil society in general) in the sharing and use of philanthropy data for public benefit.



2 Context and Purpose

2.1 Background

The last 20 years have seen a surge in organized philanthropy across borders and around the world, coinciding with the rise of the Internet, social media, and global movements. We have entered the era of global, digital knowledge and 'big data'. The financial industry, corporations, multilateral organizations, and governments are taking advantage of the opportunities offered by information technology to collect, process, and organize data rapidly and effectively. Those same opportunities should make it possible to optimize the flow of international aid.

At the same time as these developments, there has been an increasing demand that datasets be opened up for public consumption. This could make it possible for independent software developers to build new applications that allow users to access the data in ways beyond any envisioned by the data collectors themselves.

As these transformative developments in information technology unfold, so philanthropy increasingly needs to build the wherewithal to allow it to identify areas of need, emerging trends, key actors and institutions engaging in philanthropy activities, patterns and gaps in the provision of support, and opportunities for collaboration to improve impact. Collecting data on philanthropy around the world in this way is a huge challenge, given the differences that exist between philanthropic actors across borders, and the constantly evolving contexts in which they operate.

Increased public access to information leads to increased demands for accountability from both public and private actors. The high profile of certain philanthropists draws attention to the act of giving and the causes they support, giving philanthropy a level of visibility it has not had in the past. In turn, heightened public scrutiny puts pressure on philanthropy to be more transparent, providing easily accessible information on its activities.

Changes in the global economy have also affected the way the philanthropic sector works. The stalling of economic growth in more developed countries resulted in a decline in their overseas expenditure. Some countries have witnessed the dwindling of support from traditional donors. Meanwhile, countries previously seen as aid recipients are emerging as rising economic stars in the global arena. This shift affects donors in different ways, but they all share a common need: more and better philanthropy data. Some will use this to allocate their diminishing resources better, others to assess needs more sensitively and be strategic in their giving from the start.

2.2 The Challenge

Currently, reliable data on giving can be found in only a limited number of countries. Globally comparable data is virtually non-existent and it is hard to find a careful analysis of philanthropic giving that views it through a global lens. Given the differences among foundations in any given country, not to mention across borders, gathering global data on philanthropy is no small challenge.

This challenge is compounded by the fact that, when it comes to generating, managing and using data, countries, and organizations within countries, have different needs – and differing capacities to meet these needs. A further complication is the lack of clarity on intellectual property rights (data ownership) and the control of its use – which can lead to organizations and individuals not knowing how or where to access data even when it is available.

These challenges point to the need for a statement of values and principles that can serve as a framework to guide the collection and use of philanthropy data. This is the prime purpose of the Charter.

2.3 Purpose of the Charter

The Charter promotes:

- A global vision for collecting and using data on philanthropy
- A framework for collaboration among data collectors, providers and users
- A forum for assessing current data-related needs and capacities

Organizations endorsing the Charter share the belief that implementing the principles and values described in it is essential to improving philanthropy data and promoting data-driven, informed decision-making. More specifically, the goals of the Charter are to:

- Establish standards for collecting and sharing data – leading to improved efficiency and increased transparency and accountability
- Enable cross-national data comparisons – leading to a more complete and comprehensive picture of philanthropy and contributing to benchmarking
- Map the gaps and trends of philanthropy – leading to informed decision making and fostering opportunities for collaboration between and among sectors and stakeholders
- Identify capacities that need to be developed in terms of technology, human resources, skills and management – leading to improved data management systems
- Increase visibility of the philanthropy sector – enhancing philanthropy's ability to relate to and influence other sectors
- Use data to influence change, and to provide feedback on practices and policies that affect people's lives and/or environment – bringing the data to life by using it for engagement, collaboration and advocacy, in order to increase impact

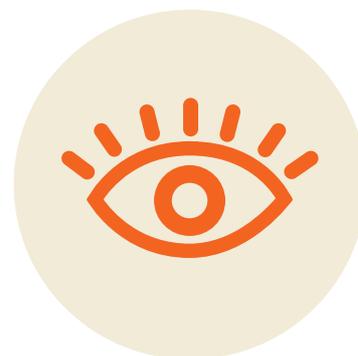
3 The Charter:

A Commitment to Data on Philanthropy

3.1 Vision

Maximizing philanthropy's impact is a shared vision for the sector – organizations and individuals are constantly looking for new approaches and strategies to better serve their constituencies. Data is key to improving philanthropy's abilities to understand needs, coordinate efforts, and allocate resources. We envision a philanthropy sector powered by good data to achieve greater impact.

Vision: Good data for greater impact



3.2 Values

Good data on philanthropy is open, inclusive, respectful to all stakeholders, and committed to improvement – resulting in comparable data that can be used to maximize social impact. It documents philanthropic flows and answers questions about who gives, how they give, who benefits, and how they benefit. Four values drive the collection and dissemination of philanthropy data:

- **Openness** – Data should be open to third parties, subject, of course, to all legal restrictions and rights and copyright protection
- **Inclusiveness** – Data collection and data use should acknowledge the diversity of the sector, in terms of the nature of the organizations, the issues they are concerned with, and the cultural contexts in which they operate
- **Respect** – To ensure trust and confidence, it is important to acknowledge the providers of data and for all parties to take responsibility for data provision, usage and openness
- **Improvement** – Organizations collecting data should monitor their procedures, improving them in line with emerging principles of good practice, in response to stakeholder feedback and as new tools for data processing and dissemination become available



3.3 Principles

Five fundamental principles underlie the strategic collection and sharing of global data on philanthropy. These principles are interdependent and should be applied concurrently. For instance, individuals and organizations will be willing to share their information only if they are assured it is safe to do so, in a transparent and respectful environment.

These five principles are:

- **Accessibility:** Data should be accessible to individuals and organizations – it should be clear what is available, where to find it and how to access it
- **Quality:** Data should be accurate, reliable, timely, comparable, actionable, and adequately managed through the stages of its collection, analysis and presentation
- **Sharing:** The more people and organizations (especially from different backgrounds) share what they know – in terms both of ideas and information, and also of what they discover in the process of creating, using and interpreting data, including its limitations – the greater the opportunity to improve the quality of data collection and collaboration
- **Accountability:** Data providers, collectors, and users should be responsible stewards of the data, placing concerns for human dignity and confidentiality first but striving for maximum transparency, truthfulness and objectivity, and for the productive and constructive use of data
- **Safeguarding:** Data should be public in principle, but clear policies and procedures should be implemented to ensure an adequate balance between openness and privacy and security



3.4 Core Benefits of Coordinated Data Collection

Sharing information across organizations, sectors and borders, coupled with the development of compatible data systems and frameworks, will mean that time and resources are not wasted by organizations constantly reinventing the wheel. The sector as a whole can learn from the experiences of peers and other sectors, and accelerate the establishment of faster, more affordable, and more useful mechanisms for data collection and dissemination. The end-result of this will be more effective philanthropy, developed in a way that reflects and honors the diversity of the cultures and contexts in which it is played out.

With coordinated mechanisms for data collection, organizations will be less and less inclined to operate as atomized units – with no recognition of others' linked activity – and will, instead, have to evolve a more collaborative approach to addressing critical issues. This spirit of co-operation will help to ensure that data is not only truly global, but also comparable – so that an organization considering supporting an initiative in one country could explore the data from a similar initiative in another country, delivered in a form that allows immediate cross-reference and analysis.



Benefits of a coordinated approach



Share knowledge – allowing better time and resource allocation, while avoiding duplication

+



Reflect diversity – respecting cultures and contexts

+



Enable coordination – promoting coordinated efforts and resources for data collection, to ensure that it is comparable

+



Promote collaboration – accelerating the establishment of faster, more affordable, and more useful mechanisms for data collection and dissemination

=



More effective philanthropy

4 Ensuring Successful Implementation

The successful implementation of the Charter requires a concerted effort to address five key factors, without which philanthropy data management cannot be improved. These factors facilitate, promote and empower change:

- **Commitment:** Nurturing leadership to support and advocate for the adoption and use of the vision, values and principles of this Charter over the long term
- **Capacity:** Promoting the development of specific skills, technology, infrastructure, and strategic use of philanthropy data
- **Investment:** Identifying, coordinating, and mobilizing sufficient financial and other resources to support the necessary effort to launch, implement and sustain the development of data and related capacities
- **Knowledge:** Sharing knowledge, systems and best practices, with a long-term commitment to building a knowledge base about data collection, management and analysis
- **Collaboration:** Ensuring the co-creation, co-operation and co-investment of diverse actors for mutual benefits and to ensure the sustainability of initiatives on philanthropy data

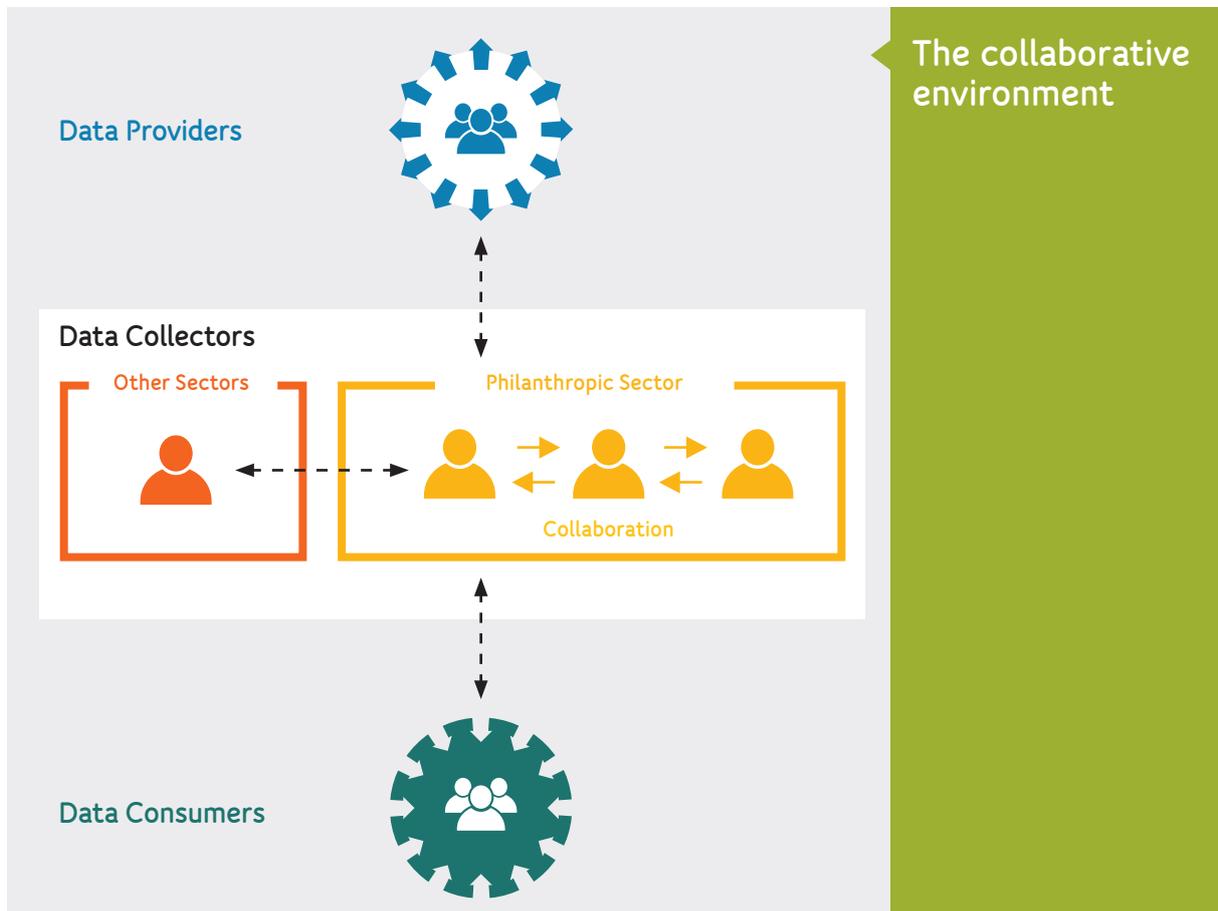
The Charter cannot be implemented if consistent attention is not paid to these factors, each of which is essential to ensure the success of any important initiative. The effect of such failure would be far-reaching and is hard to countenance. Committed leadership among key stakeholders is important for the Charter's visibility. Dedicated technical assistance, to develop the necessary organizational competencies to collect and maintain data, is key for philanthropy to document its work in formats that can be shared with others. Sufficient investment of funds to promote the aims of the Charter, and underwrite the development of data management technologies and competencies, is crucial for data to be shared in efficient or timely ways. Without ongoing collaboration and knowledge sharing, the field risks the development of multiple, incompatible data collection systems.

5 Stakeholders

The key stakeholders upon whom the development of better philanthropic data depend are:

- **Data providers:** Organizations and individuals providing data (by answering surveys, for instance)
- **Data collectors:** Organizations and individuals collecting, analyzing and/or managing data about philanthropy
- **Data consumers:** Organizations and individuals using data to advance and better understand the philanthropy sector

The Charter aims, in particular, to promote a collaborative environment among philanthropic data collectors and, secondarily, to improve their ability to work with data collectors from other sectors. Equally importantly, the Charter aims to foster transparency and trust through the establishment of clearly delineated relationships among data collectors, data providers and data consumers. Further, given that several organizations fit into more than one stakeholder category, it is even more important that the Charter be a framework for cooperation. Finally, even though data consumers are mainly from within the philanthropy sector, the information produced is of value to anyone interested in the field (e.g. academia, governments, civil society actors in general).



6 Signatories

Signatories to this charter are committed to actively promoting the value and importance of philanthropy data, with a clear understanding of their roles and responsibilities in this shared endeavor. Signatories commit to honoring and promoting all values and principles embodied in this Charter with respect to their data-related work. They commit to:

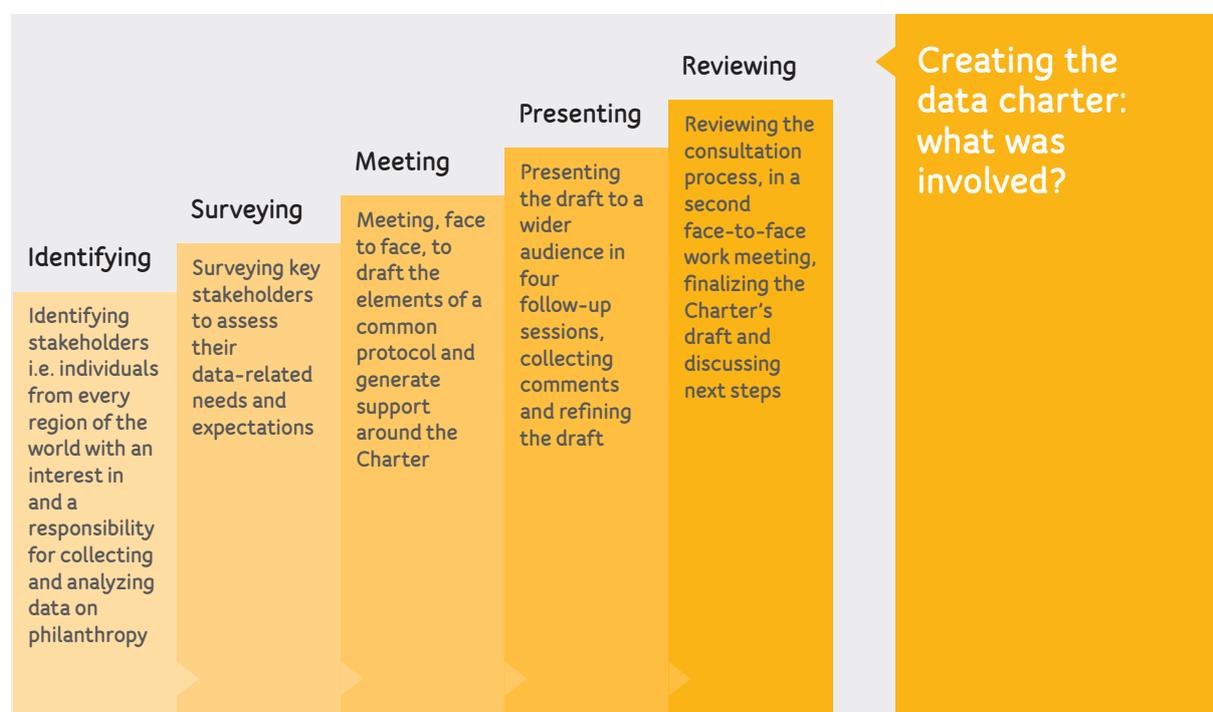
- Promoting data as a vital tool for the advancement of the philanthropy sector
- Ensuring their data-related work is guided by the Charter
- Collaborating with other signatories in a flexible and open way
- Respecting, and whenever possible, engaging with existing data collaboration efforts and fostering new ones
- Addressing the challenges and resource issues described in the section on 'Ensuring Successful Implementation'
- Respecting and helping to bridge cultural differences and the varying levels of technical capacity among organizations
- Promoting the Charter and encouraging other organizations to support it
- Jointly monitoring the use and influence of the Charter



7 Appendices

Appendix 1 – How the Charter was Developed

Recognizing the role that quality data plays in philanthropy, WINGS, along with a team of leaders from the field, worked on a series of global consultations on the use of philanthropy data. Stakeholders engaged in a discussion about key principles and the outlining of a common vision for data collection on philanthropy across the globe, to be enshrined as a Global Philanthropy Data Charter. The process lasted one year and involved the following stages:



Appendix 2 – Next Steps to Implementation

The Charter's governance is shared between a backbone organization and ambassadors. WINGS acts as the backbone organization, being responsible for monitoring and evaluating the Charter's progress, by disseminating related initiatives and monitoring the number of new supporters. We start with an initial group of ambassadors formed by those who were directly involved in drafting the Charter, having been invited to join this group on the basis of their regional representation and work with data. Ambassadors agreed on a shared commitment to raise awareness, advocate and promote the Charter within their networks and regions.

Both the ambassadors and WINGS agree to work jointly to support the implementation of the Charter globally. This year (2014), several events and opportunities have already been identified for driving forward this movement towards good data for greater impact.

Endorsing the Charter's principles and values is a step forward in promoting informed decision-making in philanthropy.

www.wingsweb.org
Email: info@wingsweb.org
Tel: +55 11 30787299

Address:
Av. 09 de Julho, 5143, cj 61.
Sao Paulo - Brazil. 01407200

