

The logo for PhilantrOping features the word "PhilantrOping" in a white, sans-serif font. The letter "O" is stylized as a white circle with a small white number "2" positioned above it. The background is a solid blue color with decorative curved shapes in a darker shade of blue.

Oxygenating good actions

The Future of Philanthropy in Brazil:
Contributing to Social and Environmental Justice

Sponsored by:



“Philanthropy is the
**responsibility of
giving back** from a
privileged condition.”

– Philanthropist

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Foreword



Cristiane Sultani

Founder and President of Instituto Beja

As the founder of Instituto Beja, I am deeply committed to philanthropic giving and to advancing the field of philanthropy in Brazil, both through direct contributions and by volunteering. Our vision is to facilitate meaningful dialogues with our peers, explore diverse strategies and embrace the emerging trends of strategic and collaborative philanthropy, which, while practiced, have not yet become widespread in our country. At the heart of Instituto Beja's core values are curiosity and affection. We are driven by an unwavering commitment to continuous learning, a deep love for the causes we support, and a genuine willingness to listen to the perspectives of various actors.

Our belief in collaborative philanthropy from inception to implementation guides our work. We endeavor to engage in research, diagnosis, and execution, partnering with qualified NGOs to achieve our goals. We are pleased to present this report on philanthropy in Brazil, furthering our mission to

foster philanthropic growth and development in our country. This initiative, which we affectionately term "Filantropando," has been made possible through the invaluable support of fellow philanthropists and sector partners. As we continue on this journey, our collective aim is to bring forth innovative ideas capable of driving the systemic change our society so desperately needs. With dedication, collaboration, and a shared passion for making a positive impact, we can pave the way for a brighter future for Brazil.

Yours sincerely,

A handwritten signature in cursive script that reads "Cristiane Sultani". The signature is written in black ink and is positioned above a horizontal blue line.

Cristiane Sultani

Introduction



Silvia Bastante de Unverhau

Author and Partner Braymont Philanthropy Advisory

This research was commissioned by Instituto Beja to understand whether philanthropy in Brazil is sufficiently supporting systems-changing initiatives and addressing the root causes of social and environmental problems.

In terms of the context for philanthropy, Brazil is the largest country in Latin America and the seventh most populous with almost 214 million people¹. Brazil remained a Portuguese colony until 1808 and independence was achieved in 1822 with a legislature formed in 1824. Slavery was officially abolished in 1888. An authoritarian military junta came to power in 1964 and ruled until 1985. Brazil's current constitution dates from 1988, and the country is a democratic federal republic with a presidential system.² Brazil ranks 87th on the Human Development Index.³ As an upper-

middle-income economy according to the World Bank, Brazil has the largest share of global wealth in South America.⁴ In 2021, Brazil's income distribution inequality based on the Gini coefficient reached 48.9 (where a value of 0 represents absolute equality while 100 would be the highest possible degree of inequality).⁵

To provide an empirical base for this report, 21 Brazilian philanthropists as well as 21 professionals or experts working in philanthropy were interviewed between September and December 2022. While the sample is gender and age balanced, it cannot be considered representative for Brazil as a whole, as it is largely focused on São Paulo and, to a lesser extent, Rio de Janeiro. Furthermore, across 42 interviewees, only three could be considered non-white

(from an appearance perspective). Interviewees are also not necessarily representative of the philanthropic sector as a whole, as they tend to be the most experienced philanthropists in the country.

Quotes have intentionally been dissociated from references to specific foundations or sectors of action, as interviewees were promised that their candid views would be kept anonymous. The quotes included in the full report add much color and nuance to the report. In general, the philanthropists' views were prioritized over those of philanthropy professionals and experts, as the former are usually harder to uncover and they hold the ultimate decision-making power. Finally, this research is of course liable to the author's views and biases, be they conscious or unconscious.

This report has been authored with the sincere hope that it could help to spur a different type of dialogue in the country, increase the amounts of philanthropic giving, and improve how funding is given for social and environmental justice. The ultimate goal is a fair, just, and inclusive society, where all Brazilians can reach their full potential.

Executive Summary

This research was commissioned by Instituto Beja in 2022 to understand whether philanthropy in Brazil is sufficiently supporting systems-changing initiatives and addressing the root causes of social and environmental problems. It is based on interviews with 21 Brazilian philanthropists as well as 21 professionals and experts working in philanthropy.

In terms of the context for philanthropy, Brazil is the largest country in Latin America with a population of 214 million⁶. It has a history of colonization, slavery, military dictatorship, and high income distribution inequality. Historically, philanthropy in Brazil was influenced by the Catholic Church and the state, but in recent years it has become more professional and moved away from a pure charity approach.

This report has been authored with the sincere hope that it could help to spur a different type of dialogue in the country, increase the amounts of philanthropic giving, and improve how funding is given for social and environmental justice. The ultimate goal is a fair, just, and inclusive society, where all Brazilians can reach their full potential. With this guiding purpose, the report arrived at ten key findings:

1. Brazilian philanthropy is growing though there is no common definition and the biggest motivators are family values, a sense of responsibility, and observing injustice and inequality.


Philanthropy in Brazil has seen significant growth, almost

doubling in the last decade. Philanthropy is a complex concept with many different interpretations. Most of the philanthropists interviewed defined philanthropy as using private wealth for the public good, or the love of humanity. Many also mentioned the importance of reducing inequalities and promoting social justice, as well as protecting the environment. Similarly, most (17 of 21) included volunteering and lending their business expertise as part of philanthropy.

The motivations for philanthropy in Brazil are primarily driven by family values, a sense of responsibility, and a desire to address inequality and injustice in society. Philanthropists in Brazil often cite personal experiences, such as growing up with parents who volunteered and visited orphanages, as a major factor in their desire to give back. Some also mentioned that their privileged position in society made them realize the importance of using their resources to help others.

2. Overall giving is at a relatively low level, and Brazilians, especially the wealthy, could give more.

The level of philanthropy in Brazil is considered to be relatively low, with an estimated total of US\$ 4 billion in yearly giving. This is significantly lower than Brazil's predicted giving based on its share of global GDP (predicted giving of US\$ 20 billion) or based on the number of Brazilian billionaires (predicted giving of US\$ 28 billion). Giving increased during the COVID-19 pandemic, especially among big corporations and wealthy



families, but it also exhausted resources. The positive surge in donations may have been temporary and giving appears to be reverting to pre-pandemic levels. In Brazil, giving is common across socioeconomic levels, but the middle class tends to give proportionally more. The middle class is seen as more aware and empathetic to problems as they are closer to them. The poorest people are said to donate the most considering their income and the way they help each other in their communities. Philanthropy among the wealthy is still generally considered to be low, despite the growing wealth in the country. There is a perception that there is not a lack of wealth in Brazil, but rather a lack of willingness to give significantly among the wealthy. Interviewees expressed the view that the wealthy are becoming more conscious of the inequalities but still donate little. Professionals suggested that wealthy individuals may not donate significant amounts because they do not want to upset their privileges or because they see giving as an offset for their emotional discomfort over being wealthy. The lack of giving is seen as a cultural issue that will take time to overcome.

3. Brazilian philanthropy has developed over the last decade and is moving beyond corporate philanthropy into diversified themes and towards more grantmaking and social investing.

Corporate philanthropy, which has dominated Brazilian philanthropy in the last decades (estimated at 80-90% of all

philanthropy) is quite professional but has certain limitations, such as a focus on traditional themes. Brazilian philanthropy primarily supports education (estimated to account for around 60%-70%) and health (10-15%), with increasing support, especially from international funders, for climate change and environmental issues (5-10%). In recent years, there is a trend of second and third-generation individuals from wealthy families creating new foundations focused on various issues related to human rights and social justice (2-5%).

The way foundations operate in Brazil is also changing, with a shift towards more grantmaking (from an estimated 20-30% of philanthropy), as opposed to operating their own projects. The shift is driven by factors such as the impact of the Covid-19 pandemic and the recognition of the value of strengthening civil society. There is also a growing trend towards sustainable and impact investing and some philanthropists interviewed practice both and view them as complementary to philanthropy.

4. Yet there is limited consensus about the nature and role of philanthropy, especially vis-à-vis the public sector, and in terms of influencing politics and democracy.

The role of philanthropy in Brazilian society is a topic of debate, with some viewing it as a means of providing for basic needs and alleviating suffering in the short term, while others assert that it should be focused on catalyzing systemic change and giving people the means to support themselves in the

long term. Some mix up the concepts of philanthropy, charity, and paying taxes. While the mindset of many philanthropists is evolving, it is still a process that requires time to complete.

The role of philanthropy vis-à-vis government is also debated. Some believe that the government must play a crucial role in implementing programs at scale and setting policies and legal frameworks, but question philanthropy's ability to influence public policy. Others believe that philanthropy and government must work together, but they admit it is not an easy relationship and some argue that the government is being held responsible for all of the nation's problems.

In the context of Brazil, philanthropy has a complex relationship with politics and democracy. Some believe that philanthropy should be a caretaker of democracy and support civil society, while others feel it is difficult to associate with political views. It was cited that philanthropy can also help create spaces for discussion and democratic dialogue, and some believe that philanthropy needs to take a position that it is often reluctant to do.

5. Racial and gender equality, trust-based philanthropy, and prioritizing local knowledge are increasingly discussed yet practiced to different degrees.

Brazilian society is facing the legacy of colonialism, and philanthropy has been criticized for reproducing colonial forms and not sufficiently promoting racial and gender equality. A majority of philanthropists (18 of 21) agreed on the need to

promote racial equality with intersectional factors such as gender and income, and some (7 of 21) are actively funding initiatives in this area. Professionals and experts in the philanthropic sector concurred that while some progress is being made toward addressing social inequalities, more needs to be done. They emphasized the need for more diversity in the philanthropic sector itself as it is still largely run by white men, and for greater recognition of the political dimensions of racism. They hope to see more efforts in promoting equality and fairness for all, rather than "empowering" marginalized groups.

Trust-based philanthropy is the idea that philanthropic organizations should trust their local partners and recognize their expertise and knowledge. This approach implies supportive rather than directive philanthropy. Interviewees had mixed opinions on whether Brazilian philanthropy is embracing a trust-based approach. Some philanthropists (15 of 21) believe in the importance of trust in relationships and are working closely and systemically with local organizations, leaders, and communities. However, there are also challenges, such as who is deemed trustworthy. Others have concerns over accountability and a general lack of trust in institutions in Brazil. Professionals and experts (21 of 21) expressed a need for more trust-based relationships and stressed that this involves lowering controls, listening more, valuing local knowledge and expertise, and having an overall more horizontal relationship.

6. Some progressive philanthropists are recognizing their privilege, addressing power dynamics and inequality, and encouraging systemic changes, by supporting a strong and independent civil society.

The majority of interviewees (34 of 42) acknowledged their privilege unprompted, either in terms of wealth, ability to engage in philanthropy and volunteering, or other forms of privilege. They understand the contradiction at the heart of philanthropy, where the socio-political and economic systems allow some individuals to accumulate wealth, sometimes at the cost of others and the environment, and then give back a small portion through philanthropy.

The importance of building trust through dialogue and transparency was emphasized as a means to overcome the power dynamics between a giver and a receiver. Many philanthropists also believe in the importance of supporting systemic change and some focus on supporting organizations to make their own decisions, while others prefer a more orchestrated approach. Some professionals see a growing willingness to engage with systems change but estimate that nevertheless, systems change philanthropy accounts for only 5% of Brazilian philanthropy. Others doubt the level of sophistication for systems change philanthropy in Brazil and believe that philanthropists don't fully embrace the power of civil society as a change maker.

All interviewees concurred that while inequality is the biggest issue in the country, philanthropy alone cannot change the entire socio-political and economic system. They view philanthropy's role as supporting the development of a thriving and independent civil society that works towards equal opportunities for all Brazilians and addresses the structural discrimination in society. The professionals emphasized the importance of understanding the existing power structures, having a systemic view, and recognizing one's role in the problem. There is certainly a small yet growing group of progressive philanthropists who are supporting systems change and are willing to address the power dynamics in their giving by supporting civil society. Most interviewees wished for more grantmaking and more support for civil society organizations.

7. The philanthropic sector has become more professional with strong backbone organizations, while the non-profit and civil society sectors need further support and development.

The philanthropic sector in Brazil has grown and become more professional in recent years. Organizations supporting philanthropy in Brazil include at least four recognized membership organizations, research and academic organizations, and consulting entities. The sector is seen as mature, strong, professional, and utilizing best practices, but

also as operating in a small “bubble” that concentrates funding in a few areas. Some challenges include the lack of training opportunities, the need to further recognize the sector’s power, and the need to develop a unique Brazilian identity while learning and sharing with other parts of the world.

Furthermore, most interviewees also identified additional challenges faced by non-profits such as the pervasive lack of trust or confidence in the sector and being held to different standards than businesses. They agreed that the non-profit and civil society sector in Brazil has several developmental needs, including improving the quality of management in the sector, accessing additional unrestricted long-term funding, and receiving training on how to influence the government.

8. Increasing meaningful collaboration and improving the legal and tax environment for philanthropy could spur considerable growth.

Most interviewees (34 of 42) wished for further collaboration. Brazilian philanthropists overwhelmingly believe that greater collaboration, meaning co-funding or pooling funding, is a key priority and they recognized the need to align their work and reduce the dispersion of efforts in the sector. At least 16 of them are already engaged in co-funding. As a matter of fact, at least eight different examples of collaborations that involve co-funding by at least one philanthropic funder from Brazil were mentioned spanning diverse topics including early childhood development, climate change, and social justice. While many

philanthropists prefer to start their own initiatives, many are now considering collaboration as there is a belief that it can lead to better results.

Brazilian professionals and experts agree on the need for greater collaboration in terms of efficiency and accountability. However, they have more nuanced views on whether collaboration is happening in practice and pointed out that oftentimes, when philanthropists say collaboration, they mean somebody else giving to their own project. Many spoke of the difficulties in collaborating due to issues such as ego, attribution, and control.

Most interviewees (33 of 42) agreed that a better legal and fiscal environment can increase giving, but the specific recommendations varied, such as removing the extra tax on donations, making donations tax deductible, raising inheritance tax, or raising taxes for wealthy people. The overall consensus is that the government needs to create conditions and incentives for philanthropy to thrive in Brazil.

9. Fostering the learning and development of philanthropists, promoting a culture of giving, and increasing the visibility of philanthropic role models, could also lead to significant growth.

At least six robust efforts to promote greater giving through initiatives aimed at wealthy philanthropists, middle-class professionals, and givers in general, were cited, including

innovative mechanisms for funding as well as associations, pledges, and movements.

Most interviewees (32 of 42) saw the need to foster philanthropists' development. Philanthropists learn and develop their approach through personal involvement and experiences, exposure to the reality of people in need, deeper connections with social entrepreneurs, and through training and advice. Almost all philanthropists interviewed spoke about their own learning process and some seek alignment in various aspects of their lives, including how their businesses are run, as well as how their wealth is being invested. Engaging in philanthropy is seen as a deeply personal choice that requires a level of personal development, conscious reflection, and self-awareness.

The need to promote a culture of giving from a young age was emphasized by a majority of interviewees (32 of 42) who also noted the absence of social pressure to give. Many philanthropists explained that they often knew each other socially, but do not usually discuss their philanthropic projects. The importance of giving more visibility to philanthropic role models was also noted (26 of 42). Some philanthropists prefer to remain private due to modesty or safety concerns or to prevent further fundraising asks, yet some also believe that their visibility and recognition can inspire others to engage in philanthropy.

10. There is hope that philanthropy could have a more significant and sustainable impact for a fair Brazil with opportunities for all.

While this report has focused on what more philanthropy in Brazil could do, it is important to reflect on the fact that there are already some philanthropists and foundations who are giving generously with a systems mindset. Interviewees believe that philanthropy will always occupy a structural place in Brazilian society, but the hope is that overtime it shifts from addressing the basic needs of the population, protecting the environment, or addressing historic inequalities to funding the pursuits of human ingenuity such as the arts, sciences, and philosophy.

There were various reasons cited to believe in the future of Brazil, starting with the generosity of certain families and individuals, the rise of the desire for a more inclusive society, and the huge progress that, despite everything, Brazil has made as a democracy and in terms of reducing poverty.

Nevertheless, interviewees in Brazil wish for wealthy individuals to change their mindset, with a focus on increasing giving, understanding their responsibilities, and engaging in philanthropy more actively, with an increased focus on structural changes. The majority of the interviewees wished for philanthropy to focus more on climate change, civic education, and support for democratic institutions.

1. Context and Motivations



Brazilian philanthropy is growing though there is no common definition and the biggest motivators are family values, a sense of responsibility, and observing injustice and inequality.

Exploring Brazilian Philanthropy

Philanthropy in Brazil has seen significant growth, almost doubling in the last decade. The GIFE census from 2010 reported R\$ 2 billion⁷ which adjusted for inflation would be around R\$ 2.7 billion in 2020⁸ (circa US\$ 532 million) and the GIFE Census 2020 showed R\$ 5.3 billion⁹ (circa US\$ 1 billion). For a historical perspective on philanthropy in Brazil, other reports¹⁰ have described the history of colonization, the role played by the Catholic Church, the state control during the 30s, and the military dictatorship from the mid-60s onwards and their impact on civil society and giving. More recently, philanthropy is gradually moving away from the charity approach and becoming a more professional sector.

If you go back to native people in Brazil, there was always giving and gratitude towards each other in nature. And then with colonization, we adopted the colonizer's way of thinking and way of giving, especially through

the Catholic Church. At the beginning of the last century, we started having more organized movements, and at the end of the last century, the non-profit sector was born in Brazil very influenced by Western philanthropic practices. More recently, we have moved from a culture of helping to a culture of looking into the root causes of problems, but not necessarily wanting to change systems. - Philanthropist

In the past, people refrained from using the term philanthropy and that has changed slightly. We have seen an evolution in the past thirty years, from providing support and help for the ones in need with an assistance-based approach linked to the churches, to philanthropy that is going beyond the basic needs and exploring the different roles in our society. - Professional



Defining philanthropy

There is not a common definition of philanthropy. For most, it is giving away money and volunteering, yet for some, it is about solving the problems the government cannot solve. When asked about how they defined philanthropy, many philanthropists reverted to the classic definition of philanthropy as using private wealth for the public good, or the love of humanity, and others added the angle of social justice and reducing inequalities. It was clear that philanthropy was focused on both human beings and the environment. Most think philanthropy is about giving money but many included volunteering, lending their business expertise, and other forms of support as part of philanthropy. At least 17 of the 21 philanthropists put forward this perspective.

Many acknowledged that 'giving back' was a responsibility and some also included the idea of being able to help or assist

from a position of privilege or power. A couple also mentioned how much philanthropy gives meaning to their existence. Where there was more of a discrepancy and this matters for the perspective of whether philanthropy in Brazil is supporting systemic change, is whether philanthropy is about solving problems, especially those the government can solve. Only 11 philanthropists interviewed included this as part of their definition.

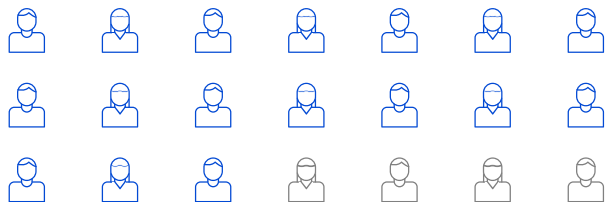
It also emerged that the term philanthropy has some negative connotations as well, linked to some scandals from the 90s and that it is also confused with the idea of charity. Some philanthropists cared to point out that philanthropy is a more strategic or structured approach to giving, and hopefully also a more sustainable way of giving than charity.

- ▶ **Largest country in Latin America**
- ▶ Population of **214 million**
- ▶ **87th** on the **Human Development Index**
Upper-middle-income economy
- ▶ **Largest share of global wealth** in South America.
- ▶ **High inequality** 48.9 Gini coefficient (100 total inequality)
- ▶ A **history** of colonization, slavery, and military dictatorship
- ▶ **Philanthropy historically influenced** by the **Catholic Church and the state**



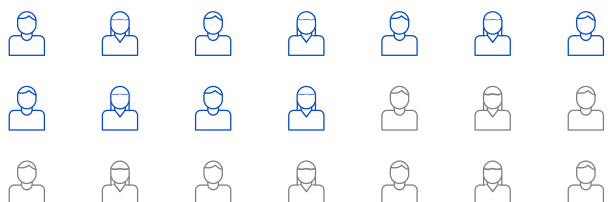
17 of 21

Philanthropists - giving money plus volunteering, business expertise, and other supports



11 of 21

Philanthropists - about solving problems, especially those government can't





Philanthropy is giving back to society and giving back to nature. It's part of the democratic values and it is not just giving money but sometimes providing talents as a volunteer or opening doors and your network. – Philanthropist

Philanthropy needs to be care for human beings and care for the environment. Some people think if they help their workers or maids that is enough. That's not enough. Charity is not enough. We need Philanthropy. – Philanthropist

Philanthropy is a way to help change the things in the society. The government and the states can't solve all the problems. Society needs to help and philanthropy is one way that society can help. – Philanthropist

Philanthropy is being able to give back to society a little bit of what you have, either giving money or services. – Philanthropist

Philanthropy gives meaning to my life. It makes my life worthwhile and that of my children, knowing that when I pass from this world, I left something and I had a reason to exist. – Philanthropist

Charity is just giving. Philanthropy is a more sophisticated way of giving. – Philanthropist

Philanthropy is helping and assisting the person who needs to be helped, who is less able than you at that moment to get out of a difficult situation or to have an opportunity to develop. – Philanthropist

Philanthropy is a way to help change the things in the society. The government and the states can't solve all the problems. Society needs to help and philanthropy is one way that society can help. – Philanthropist

Philanthropy means social justice. Some have more opportunity and privilege, and philanthropy is where we try to recalibrate that equilibrium – Philanthropist

A way of giving back a little bit of what you received, balancing giving and receiving. It means, to really think of the actual problems and try to solve them in some way. – Philanthropist

Philanthropy has to be rooted in the culture of a people and support some ideals of society. To be able to do a little more than what the state already does as the state can't do everything. Philanthropic initiatives must help a country to become a more inclusive society. – Philanthropist

Philanthropy is to give back, not only money but can be volunteering as well. It is to try to balance a little bit the differences in society because I am in this fortunate position I can give back – Philanthropist



The biggest motivators are:

Family values

A sense of responsibility

Observing injustice and inequality

Exploring the motivations for philanthropy

The biggest motivators identified for philanthropy in Brazil are family values, a sense of responsibility, observing injustice and inequality in Brazilian society, as well as personal experiences. Some philanthropists spoke about how their parents took them to visit orphanages as kids, or to volunteer from a young age, which meant they grew up knowing that is important. This is in line with most studies for the motivations of philanthropists around the world the author has been involved in. Usually, it comes down to values or specific experiences, as well as the recognition at some level that their privileged position is not exclusively down to their own qualities or actions, but to an element of luck or blessing.

“

Here in Brazil, you can live in your bubble, and not even know. But I always had this calling - why am I here? We have a very big and generous family and we went to this favela to distribute Easter eggs. It was exactly on the other side of my school, so I knew what was on the other side of the wall. At fifteen I already started to do volunteer work. - Philanthropist

Philanthropy was a choice for me because I understood that I already had enough, I did not have to focus on making more money, so I could donate my work and I'm donating myself to see how I can be more effective.
- Philanthropist

When my mother died and I got a lot of money and I started to help some organizations, mainly those more linked to the defense of democracy and partly linked to public security as well. And when my father died, I inherited even more money. And I thought well, I have a very big responsibility by having much more money than I need and then my children will later need, and I want to use it to help people.
- Philanthropist

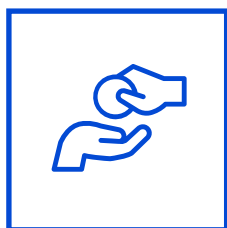
My father was a very successful entrepreneur so I had the opportunity to make use of this money in a way that would be valuable for society. Also, the inequality, seeing how so many people have no opportunities and live in poverty, and others living with wealth and luxury, always created a problem in me because I think that's not healthy for anyone. My father, when he was quite old, asked me to start a foundation. - Philanthropist

I came from a family where philanthropy is not just a speech. My father was a workaholic and also doing volunteer work. Since I was a kid, I saw him visiting hospitals, so for me this is very natural.
- Philanthropist

Poverty isn't the lack of money, it is the want or the lack of almost absolutely everything, of opportunities for self-development. And if you talk about education in the deepest sense of the word, it is about forming people, forming citizens and family members which is the base of everything else. Philanthropy must support changing from the inside out.
- Philanthropist

”

2. Estimated Giving



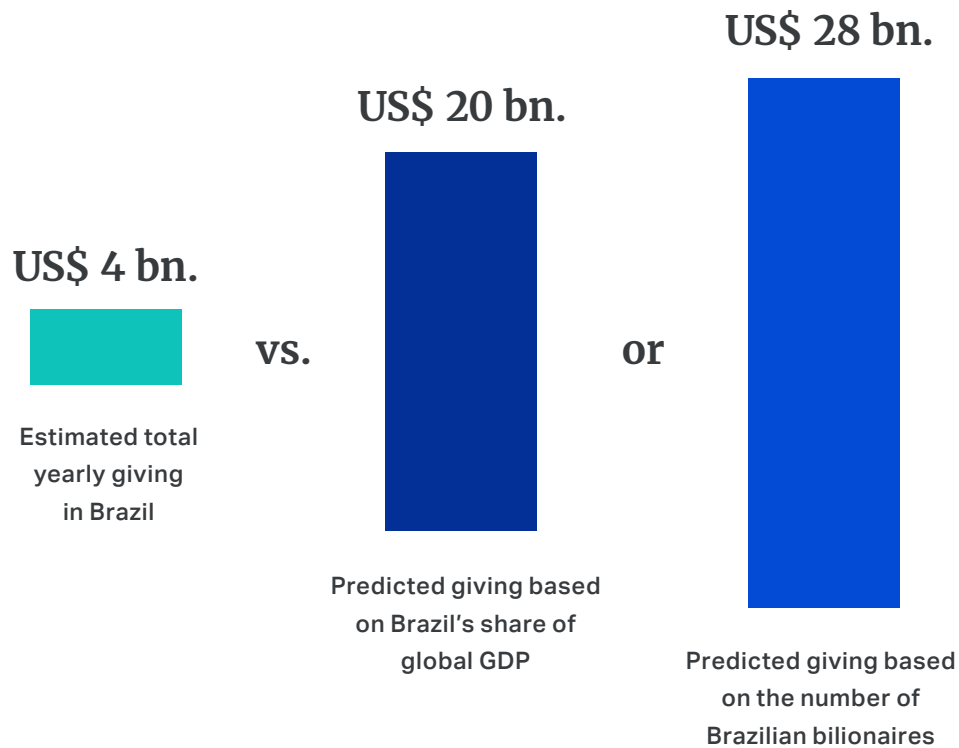
- **Giving increased during COVID-19** pandemic - surge in donations appears temporary
- **Much philanthropy is informal**, in-kind support to extended family, community, or workers
- **Monetary donations** are **not always counted or go through legal vehicle**
- **Giving is common** across **socioeconomic levels**, with **middle class giving proportionally more**
- Perception that there is **not a lack of wealth in Brazil**, but rather a **lack of willingness to give significantly among the wealthy**

Estimating overall giving in Brazil

Virtually all interviewees agreed that the level of philanthropy in the country remains relatively low. According to GIFE, in the last census from 2020 the total amount of giving among its 161 members, was R\$ 5.3 billion¹¹ which is approximately US\$ 1 billion. The GIFE figure is likely underestimating total giving in Brazil given that it is only based on member organizations from GIFE, which do not represent the totality of philanthropic organizations in Brazil, especially some newer family- or individual-led philanthropies. Furthermore, much philanthropy in Brazil is informal – such as in-kind support to extended

family, community or workers, and even if it involves a monetary donation, it does not necessarily go through a legal vehicle, so it is not always captured in figures. Finally, vis-à-vis the US, arguably the most developed philanthropic market in the world, there are no tax deductions for philanthropic giving and the culture of giving is possibly not as developed. If we take all of this into account and assume that the GIFE figure is underestimating giving by a factor of four we arrive at an estimate of US\$ 4 billion¹² for yearly giving in Brazil.

Taking the figure of giving in the US for 2021 by Giving USA¹³,



worldwide giving can be estimated to be roughly three times that number around US\$ 1.2 trillion¹⁴. Brazil has a GDP of about US\$ 1.6 trillion¹⁵, and counts at least 65 billionaires¹⁶ in dollar terms. Brazil's predicted giving based on its share of global GDP is US\$ 20 billion. Furthermore, Brazil's predicted giving based on the number of Brazilian billionaires¹⁷ is US\$ 28 billion.

Giving increased during the COVID-19 pandemic, especially among big corporations and wealthy families, but it also exhausted resources. Preliminary data from around the world shows that the pandemic led to increased giving in 2020 and up

to a certain point in 2021, but already some figures show that 2022 giving is reverting to pre-pandemic levels. Some experts have written about how the impulse of giving that started with the pandemic was of an emergency nature and does not necessarily lead to a long-term change or the development of a giving culture.¹⁸

Discussing giving by the wealthy

People are generous everywhere in the world, but what counts as philanthropy and how it is measured varies considerably. All interviewees concurred that philanthropy in Brazil is still generally low and that the overall amounts were not enough, especially given the levels of wealth in Brazil. Some suggested giving while living was a better choice than to leave significant wealth to their children. But some philanthropists who wanted to increase their giving also had pushback from their families. Professionals added that not only do they think the wealthy give little, but that sometimes they believe it is done as an offset for their privilege.

Describing giving by the non-wealthy

In Brazil, people give across the socio-economic spectrum. As in many parts of the world, the middle classes give proportionally more. In the CAF research published in 2022, Brazil is ranked number 18 in the Global World Giving Index. The country also ranked 38th in terms of donating money, 11th in helping a stranger, and 48th in volunteering time.¹⁹ Some interviewees confirmed the view that the less wealthy give more and give differently to the wealthy, but others noted, that it should not be only the wealthy that are expected to give in Brazilian society, and that the opportunity should be available to everyone.

“The society is actually a **filling gap**. They help each other, but they are not givers. It is very **difficult to raise money in Brazil**, but if you ask someone to help, they all help. If you go into the communities everybody helps each other even more.”

– Philanthropist



The first wave of Covid-19 was amazing in terms of lots of people helping. And the second time donations were less. Everybody switches to other topics now. – Philanthropist

The pandemic drew a lot of attention to what big corporations and families were doing, but it also exhausted resources. People who could give, gave and now there is a kind of hangover and it's very difficult to find resources for NGOs. – Philanthropist

The pandemic really awakened philanthropy in Brazil. All of us from the business families gave more than R\$ 7 billion. The hunger was so big that the whole family immediately had to donate because people were starving. We mainly helped with hunger and health during Covid-19. – Philanthropist

We had a very positive surge of donations during the pandemic, towards the most vulnerable populations here in Brazil. What has been demonstrated is that there is an enormous capacity to mobilize resources. This surge unfortunately has fallen in 2022. The state of the country is back to hunger again which we had overcome for almost 10 years. – Professional

The poorest people donate the most if you consider what they have and what they give. They share the little that they have – there's always space for another at their table in their house. – Professional

Researchers have shown that the middle class gives more in relation to their income. The reason is that they're closer to the problems themselves. So, they're more aware and empathetic with other people facing difficulties. They live there, they see the challenges more closely so they understand. – Professional

I lived in the US where everyone in middle class is giving money back to society. And here in Brazil they think that only the ultra-rich need to give money back to society, and it's not the case. – Philanthropist

The ordinary people who are not foundation founders find it difficult to find institutions they can trust and donate US\$ 20 a month. The retail aspect of philanthropy is very poor. The public in general has the right to be part of it. – Philanthropist

I see our high class getting more conscious about the inequalities in Brazil and hope it's going to continue, but they donate very little. It's a question of culture and it takes time to change and to evolve. To live with such inequalities every day is not easy, especially in a country that already has so much wealth and it's growing.
- Philanthropist

I wanted to give away 50% but my children strongly disagreed - they said their grandfather had worked so hard to create that wealth and that giving it away would be unfair. - Philanthropist

I get very sad when I see non-profits talking about competition. They say it's so scary there is so little money. There's not little money in Brazil - there's tons of money. It's just that people who can are not giving it away yet. - Professional

Ultimately, it's private money and what people want to do with it. 'Oh, you'll keep it for the next generation?' then you're going to hurt them. Or you give it to causes in your life. It's simple, you don't have so many choices. - Philanthropist

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3. Developments in Philanthropy



Yet there is limited consensus about the nature and role of philanthropy, especially vis-à-vis the public sector, and in terms of influencing politics and democracy.

Moving beyond corporate towards family philanthropy

A previous report on philanthropy in Brazil from 2015 characterized the corporate sector as a leader in social investment.²⁰ Many of the philanthropists, professionals, and experts interviewed, expressed the view that while corporate philanthropy is quite professional, it has certain limitations, among others with regards to the fields it can focus on, and it tends to focus on more traditional themes such as education. Corporate philanthropy is estimated to account for 80-90% of total philanthropy.

A key development in the last few years has been the creation, especially by the second or third generation of wealthy families, either individually or sometimes with part of the family, of new foundations or institutes as they are often called in Brazil. They are willing to focus on issues more closely associated with human rights and social justice, which most corporate foundations either do not have the capacity or willingness to address. Part of the explanation is that these next generations have the money, but they don't usually have a business role, and

are free to dedicate themselves to philanthropy.

The full 21 philanthropists interviewed for this study have their own philanthropy separate from the corporate philanthropy of their family, or family-owned business. They are moving beyond the traditional sectors of education and health, and the less funded area of environment and climate change, and are now embracing topics as varied as early childhood development, fairness in the criminal justice system, hunger, homelessness, mental illness, drug addiction, policy reform for human rights, citizenship and democratic values, the election of diverse (black Brazilians and women) candidates, gender-based violence, and also focusing on non-traditional constituencies such as elderly people or incarcerated women, among others. The professionals explained the shortcomings of corporate philanthropy as companies have to be careful with their brands, be accountable to their Boards, and include corporate social responsibility objectives tied to internal programs.

Becoming more professional
moving away from a **charity approach**

Family philanthropy growing
21 of 21 philanthropists have their own
philanthropy separate from **corporate**

Increasingly diverse themes including
human rights and **social justice**

Increasingly grantmaking
8 of 21 philanthropists **grantmaking**
completely or in **large part**

Social impact investing growing
7 of 21 philanthropists **brought up**
unprompted and **viewed as**
complementary

Focusing on increased grantmaking

Traditionally most foundations operated their own projects²² as implementing foundations. That is beginning to change and most interviewees noted that philanthropy is increasingly grantmaking. Of the 21 philanthropists interviewed, at least eight are grantmaking completely or for a large part of their philanthropy. Grantmaking is

estimated to account for 20-30% of total philanthropy. Part of the explanation for this shift has to do with the impact of the Covid-19 pandemic. In the context of a humanitarian emergency, operating foundations had to distribute cash or goods directly to relevant organizations trusting that they would be well utilized.

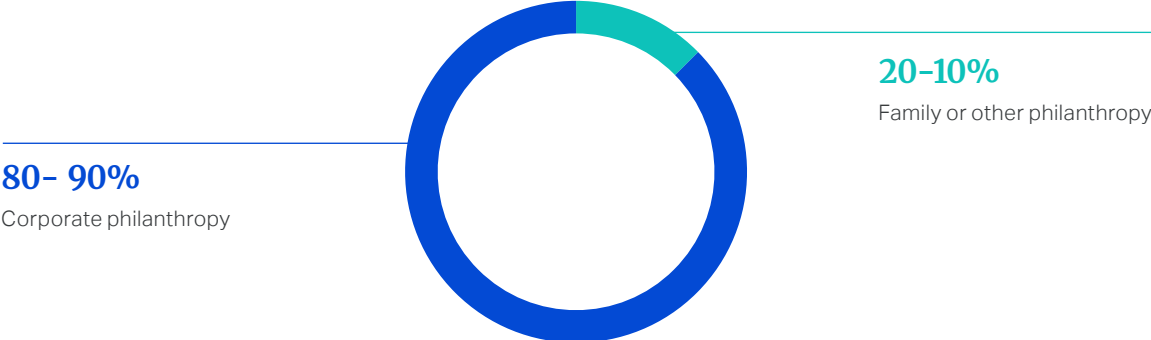
Increasing the focus on social impact investing

In a previous report from 2015, much of the charity or philanthropy in Brazil was categorized as 'social investment'²³, especially by corporates. Furthermore, practices like sustainable and impact investing are gaining additional ground, even as Brazil has already been a leader in the region for many years. At least seven of the philanthropists interviewed brought up the fact unprompted that they also practice sustainable and impact

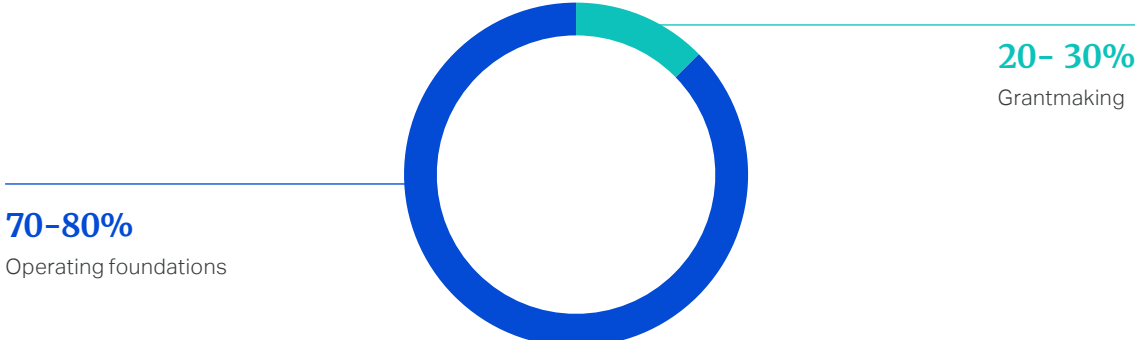
investing. In conversations, the complementarity of philanthropy and sustainable and impact investing was also highlighted, and the need to be clear that neither on its own is sufficient to transform Brazil – they each have a specific role to play. The professionals and experts also noted that especially the next generations of wealth holders tend to be particularly interested in these newer mechanisms for impact.

Philanthropy in Brazil

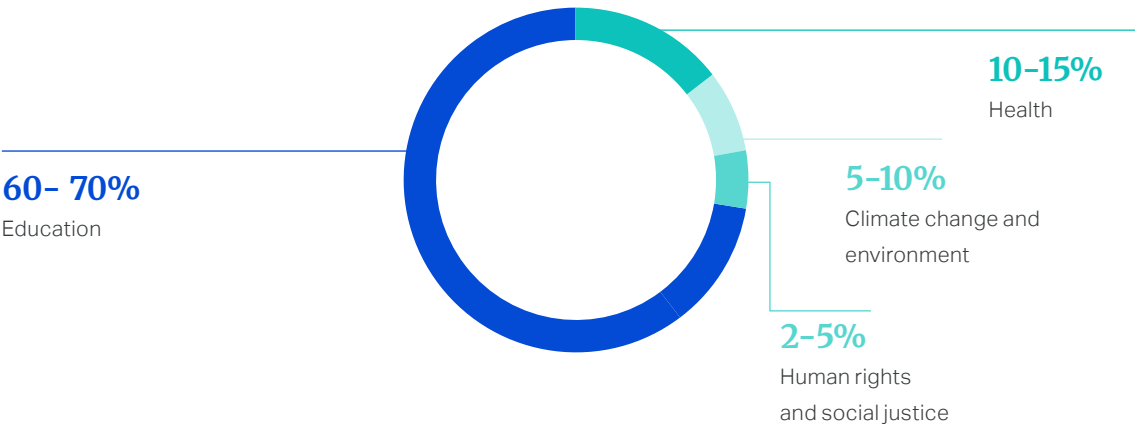
Organization



Type



Areas



Diversifying the fields and themes

Traditionally philanthropy in Brazil supports overwhelmingly education and, to a lesser extent, health. More recently there is growing support for climate change issues and the environment, as well as social justice and human rights causes.

Education - Education is one of the most developed sectors in the country and accounts for around 60%-70% of all philanthropy, according to many professionals and experts interviewed and prior reports consulted.²¹ It is the preferred theme for most larger philanthropies, especially corporate foundations in the country. There appears to be a systemic approach where many are coordinating, collaborating, and promoting large-scale change in the country. The collaboration of Todos pela Educação (All for Education) was cited as an example. This is covered in the box 'philanthropic collaborations with Brazilian philanthropists and foundations.' However, some have raised concerns about the concentration of resources in education and questioned whether people can take advantage of education opportunities when their living circumstances are so dire. Others mentioned that some social entrepreneurs in this sector are very charismatic and as a consequence are getting all the funds.

Health - Health is another major sector for Brazilian philanthropy, and according to some interviewees quite a

developed and mature sector with established philanthropic hospitals and institutions. It is estimated to account for around 10-15% of total philanthropy. Apparently, this is a development of the last couple of decades.

Climate change and environment - Funding in this domain has generally been provided by international funders, especially those focused on the Amazon. It is estimated to account for around 5-10% of total Brazilian philanthropy. Brazilian funders are only slowly beginning to fund in these areas and many professionals raised concerns about limited funding, noting that given the evident systemic nature of the challenges, the field lends itself to collaboration. A philanthropist also raised a perceived conflict between conservation and livelihoods.

Social justice and human rights - Family foundations are moving strongly into themes more akin to social justice and human rights. It is estimated to account for only 2-5% of total philanthropy. They are embracing topics as varied as fairness in the criminal justice system, homelessness, mental illness, citizenship and democratic values, and gender-based violence among others. But the overall amount of funding is still extremely low.



Very few companies had their IPO, which means that families still control and run companies. It is still charity around the company, albeit done in a very professional way, but largely focused on education. For the last few years, the wealthiest families, the second or the third generation, they were able to create their foundations in new fields. They tend to be much more aware and sensitive to causes like human rights.
- Professional

Grantmaking is much better than implementing own projects. It's putting money into civil society organizations and social movements that are more flexible. But the idea to develop your own project is still very strong - at least 70% are operating foundations. - Professional

At first during the pandemic, people said they'll do a collection of money for food packages and send them around the country. I argued that let's send money to the organizations that we know and we trust. This will help develop the local economy and it will be more efficient. They will buy whatever is really needed and not what we think is needed, because we're sitting in air-conditioned buildings in São Paulo.' - Professional

When I started, I wanted the family company to do this, because it would have been much easier if I had the company behind me. But they help young people with education and employability in areas around the company. I understood that I had to create my own project as corporate philanthropy is limited in what it can do.
- Philanthropist

It is the old story of being the social responsibility arm of the companies tied to internal programs still very much associated with marketing and communications. With the name of the corporation, you always attach a premium to the image or brand and can't go very far. - Philanthropist

It has evolved a lot. You see many organizations that are dedicated to grantmaking and others that operate programs and give grants. And the percentage sometimes changes like a particular foundation which used to be totally operational and now they're probably more frequently making grants. Even if overall grants account for only around 20%, there is some recognition of the value of strengthening civil society. - Professional

Philanthropy in Brazil is not yet there in terms of support for human rights and systemic change. The sector is dominated by corporate philanthropy, which is quite conservative in its causes and methodologies. That is why I decided to do my own thing, by myself, not with the family. - Philanthropist

I'm 100% impact and sustainable investing and Brazil is certainly going in that direction. Both ESG (economic, social, and governance) investing or impact investment can potentially lead to philanthropy or philanthropy can lead to impact investment and they should not compete. - Philanthropist

The path for philanthropy is to become more open to financial mechanisms beyond donations. We start testing how to use loans, crowd equity, and guarantees to provide new financial instruments which foundations can use to create social change. - Professional

Many people in the financial market are very skeptical and don't want to donate. Especially next gens focus on impact investing because they think the money comes back and it's better. But impact investing alone cannot solve the problems. - Professional

In impact investment, Brazil is very advanced within Latin America. It's not exactly philanthropy but it connects. Many civil society organizations are also thinking— 'how can I turn into a social business'? Many of them just can't. Many philanthropists think it's good to look at the possibility of return. But philanthropy and impact investing don't have to compete. - Professional

I believe education and health comprise 95% of the focus that we have here in Brazil. Some issues are the hardest ones to find funding for, such as human rights and democracy. - Professional

Philanthropic investment is very concentrated on education, and very low on other social issues, environmental, climate, health, youth, and violence specifically. When you start talking about human rights, then it's so little funding. - Professional

In education, you slowly see results, but in conservation, it is much more difficult. We also have a conflict between conservation and creating livelihoods. You could have both, and manage the land in a way that nature can still persist, and farmers can still live. - Philanthropist

I think that 60% of the money from big philanthropy going to education is bad. When you live in a slum and have no running water, sewage, or not enough food, you are not going to want to make an effort for your education. And if you're the best in school, you're going to have two hundred and forty-seven times fewer job opportunities. We need to take care of the basics first, then people will demand and take advantage of education opportunities themselves. - Philanthropist

I'm concerned about climate justice because many believe that environmental issues are very important but no one is addressing climate justice at a high level here, and we are going to live some big challenges in Brazil and philanthropy is not talking about it as much as it should. - Professional



4. Role of Philanthropy



Providing for basic needs
and alleviating suffering

vs.

Catalyzing **systemic long-term change**

Government impements programs at scale and **sets policies** and legal frameworks

but

Questioning **philanthropy ability to influence** government

Philanthropy should be the **caretaker of democracy, support civil society** and take a position

but

Difficult to associate with **political views**

Debating the nature of philanthropy

At a high level, there is a fundamental debate regarding the role of philanthropy in Brazilian society. Some believe that it should be charitable in nature i.e., alleviating the suffering of the disadvantaged and providing for basic needs. As with most emergency types of funding, this tends to be more short-term, and some believe most of Brazilian philanthropy is very topical and short-term focused. Some also believe that philanthropists themselves want to see the impact soon and are not willing

to wait five, ten, or 20 years. The majority of professionals and experts believe that philanthropy, especially in a country like Brazil, should be catalytic i.e., focused on addressing the root causes of social and environmental problems and driving systemic changes. There is also confusion as to what constitutes philanthropy, and some philanthropists claim that their peers mix the concept of philanthropy with charity and paying taxes.

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Because philanthropy, however big, however rich it may be, will not solve our problem. It can prototype with the third sector, and it can mobilize networks, and knowledge resources, but it can't scale up to a federal level, so it needs to be able to dialogue and influence. - Philanthropist

This is a completely community-based model, but it's very difficult to understand how you would be able to scale it without having the government involved in some way. - Professional

Philanthropy could pressure the government. It could compete with the government and shame the government into doing what it should do because there's no accountability. And it can bring modern policies, which are competitive, and above all, bring results
- Philanthropist

Investing in 27 states is an easier process than investing piecemeal in 5,568 cities. But we have to look at where things are happening. That's why we are looking at cities and NGOs and education departments in small towns to see how broadly they can influence their surroundings.

- Professional

The more independent, family-run philanthropic sector understands that we have to work with the government, with public policies, but it's not an easy relationship. - Philanthropist

In Brazil, as a philanthropist you do not create public policies, you help individual organizations as we helped more than 15 hospitals now, but we do not solve the health problem. - Philanthropist

The idea behind systems change philanthropy is that you use the money from philanthropy to influence government policy or programs. In Brazil, more than 60% of philanthropy is going into education which is always linked with the government. This is very slow and it requires a lot of patience and it's not easy but eventually it works. - Philanthropist

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Discussing the role of government and philanthropy's ability to influence

There is a recognition among all interviewees that, when the objective is to reach significant scale, the government must also play a role, be it in terms of implementing specific programs at scale, or in setting the policies and legal frameworks for certain fields. However, how much

philanthropy can actually influence public policy is debated. Many philanthropists believe that even if it is necessary to work with the government, it is not an easy task.

Some commented on how much philanthropy places the responsibility for all of Brazil's problems with the government.

Exploring the role of philanthropy in politics and democracy

A discussion arose regarding the 'political' dimensions of philanthropy i.e., its interactions with the political system and the democratic institutions within Brazil. Some believe that philanthropy should be the caretaker of democracy. By and large, professionals and experts speak about the need to support civil society as a means to ensure democracy can thrive. While some would like to fund social movements, the prevailing view is that this would associate them with the left of the political spectrum and in some cases, especially for corporate philanthropy, it is difficult to do so. It was also noted that philanthropy can help create spaces for discussion, to foster democratic dialogue, and that by definition, in a country like Brazil, philanthropy needs to take a position. Many professionals and experts agreed and want the philanthropies they are associated with to take a position

regarding democracy, but very few are willing to do so.

Philanthropy is becoming more aware of its increasingly political role. An important topic of discussion within the context of the October 2022 presidential elections was politics and corruption. And the extent to which philanthropy has a role to play in the election process. A few philanthropists spoke about the need for citizenship and democratic values and suggested that this can also be a focus of philanthropy. A handful of philanthropists interviewed are going further and supporting organizations that aim to bring diverse leadership to the legislature, especially black Brazilian women. Philanthropy is becoming more aware that if it wants to really change things it needs to work on the design of the political institutions and the way the voting systems operate.



A lot of wealthy people feel like the government should do everything. The government should take care of education, health, nature, etc., and I'm basically going to wash my hands and continue to earn money and protect my family's capital.
- Philanthropist

I am much more about giving the fishing rod than the fish. As a philanthropist, that's a choice. But there was no way you could not give food when the person is starving, so charity also has a role.
- Philanthropist

We don't invest in changing the mindsets or the system. When rich people arrive in a poor community, they try to give the people what they ask for immediately. With a very short-term thinking, you really cannot develop our society.
- Professional

We need to be willing to give money in a long-term way and make a joint effort in advocacy for public policies, where various actors come together and stick to the same route for a long time to make something much bigger. - Professional

I find it unbelievable how people put all the blame for our failures as a nation always on the government. The fault lies with society. Society doesn't push. Society doesn't ask. And I see this as a cultural problem. We as a society, we do have the resources to solve our own problems - but we need to be united work together. - Philanthropist

Most give the money for the emergency, for the moment, but not really thinking of the long-term. More than half of Brazilian philanthropy is charity-oriented and organizations themselves have that approach - they just receive and spend without a view for sustainability. It's a mindset that is changing now, but still, it is a process. - Philanthropist

When we think about systemic change, something that is larger and will take decades to achieve, people give up. They know we need to do it but it's too complicated and we can't be sure things will change. We live in a volatile economy - you can't do planned giving for fifteen years. - Professional

People think 'I'm already paying taxes and I have a company so I'm already helping society.' The fact that you're employing someone helps that person, but you're doing it because you need employees. This misconception of bundling taxes, philanthropy, and charity in the same bucket is a problem. - Philanthropist





Being a good philanthropic organization is to be that voice, the caretaker of democracy independently of the state. Because of our history, our democracy is fighting against racial discrimination. There is a role for philanthropy that this problem is solved, but over time philanthropy needs to be a caretaker of democracy and the way to do that is to support an independent, thriving civil society. – Professional

We are going into the muddy region of polarization here. Social movements in Brazil started to grow during the military dictatorship. That's why they are associated with the left. Yet social movements are just trying to overcome the huge challenges with children who do not have schools or who experience violence at home. You cannot develop human beings if you have such a terrible infrastructure with no hygiene and no running water. But few funders want to be associated with the left. – Professional

This phenomenon of collective action in the favelas, on the outskirts of big cities all over the country, is very strong. We have this intersectionality of gender race and socioeconomic issues too. – Professional

We have many projects with social leaders, and philanthropists are starting to realize they should fund them directly, and that some big NGOs don't have the legitimacy sometimes to speak for them. So, supporting civil society, not just organizations but individual leaders, matters. – Professional

The ones who don't think in a systemic way are taking a position by default. It's not about whether a party is to the left or right. Inequality, racism, etc. are political. We don't need this kind of philanthropy in Brazil where you think that the main role is just to support some projects and be impartial. If you are in this field, I'm sorry you are in this field. - Professional

We had this dream and we thought that civil society in Brazil would address all the social and environmental problems. If I were younger and I would start all over again, I would start going into politics. It's amazing how so many young want to go into politics. They are idealistic and want to change the country, especially the corruption that plagues us. - Philanthropist

We have a political problem because many philanthropists are putting money into campaigns of politics that go against what they are supporting with their philanthropy, against a fair country. As long as it supports their economic interests, they will support any candidate.
- Professional

These elections are showing for the first time a greater involvement of society with the nation. It doesn't matter if it's to defend one side or another of politics. You can see that there is an awareness and a willingness to participate in the decisions of the country itself. Even if the nation decides right or wrong, it is deciding, and this puts some responsibility in the hand of each Brazilian.
- Philanthropist

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5. Equality in Philanthropy



Racial and gender equality, trust-based philanthropy, and prioritizing local knowledge are increasingly discussed yet practiced to different degrees.

Promoting racial and gender equality

Brazilian society is dealing with the legacy of colonialism, and discriminatory social structures remain largely in place. At a fundamental level, not everyone believes that being Brazilian, or being born in the country truly means everyone is equal and deserves the same rights and opportunities. Some believe that philanthropy by and large still reproduces colonial forms. As one expert expressed it: **I think the Portuguese came here, and we were always servants. They considered themselves explorers. That's the relationship and in a way, it's replicated in society. We have been debating a lot recently structural racism, but it has its roots in our collective psychology and colonization. - Professional**

Most philanthropists interviewed said that racial equality, in some cases with intersectional factors such as gender and income, was one of the biggest issues in Brazilian society. At least 18 agreed with promoting racial equality and at least 14 reflected it in their own organizations or were actively hiring for greater diversity and inclusion. At least seven are actively funding initiatives that promote racial equality, while only three expressed that equality was not a lens for their philanthropy.

In this context, it is important to note that out of the 42 interviewees, only three could be considered non-white from an appearance perspective. Some noted this lack of diversity in the sector itself.

In effect, privilege is usually invisible to those who have it. Some philanthropists do not embrace the idea of intersectionality or compounded discrimination, while others were actually aware of their lack of understanding about what it means to be black in Brazilian society. Yet for very few, racial equality with intersectionality is not a lens for their philanthropy.

On their side, the professionals and experts concurred largely with the views expressed by philanthropists, that while some progress is being made, it is generally slow. They explained the myth that there is no racism in Brazil because everyone is mixed. Some expressed concern that the philanthropists were not sufficiently recognizing the deep consequences of racism and its political dimensions as well. Most agreed that more needs to be done to diversify the philanthropic sector itself and they mentioned the issues of gender equality and women in leadership more often than philanthropists.

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We started it, the racial equality, 20 years ago or so with a report, and at the time nobody paid attention. Now it's nice to see many foundations are doing it. – Philanthropist

I was at this philanthropy event last week and again all white people – yes, many women because we're in the social sector. I've been saying this for years now – how do we open the circle to include people who are different from ourselves?
– Philanthropist

Gender equality and racism are big and structural problems in Brazil. I see a lot of projects moving forward, but I don't think the mindset is fully looking at that.
There is a huge gap. – Philanthropist

I don't like this concept of 'empowering women' or 'empowering black women'. They do not need anybody else to 'empower them' – they just need the conditions to be fair for everybody. They can do it for themselves. – Philanthropist

I think it's slowly happening, particularly since the media is teaching a lot about racial equality. But that's not going to change quickly as this goes back centuries. We don't even perceive or realize that we are being racist. It goes very deep.
– Philanthropist

We are fully committed. You have to bring all the opinions, and in this case race, gender, age, and whatever else to create an inclusive society. In the past, we did something in our white minds where we had to say 'it's wrong because they have a different approach and we didn't even check on that.' But many Brazilians have a deep problem with racism. They think it's not a problem, it is just the culture here. But when you go a little bit deeper, you see that a lot of our problems have their roots in racism. But some, even in my own family, do not think it's very important. They think it's something that goes along with economic development, that you don't have to focus on.
– Philanthropist

I am funding these organizations that work on racial equality in Brazil. They have a hard time raising money. What is also important is reflecting in the foundations and non-profits the profile of the people that one is working with. I have seen more efforts in the enterprises to hire more black people, but not enough into philanthropy. – Philanthropist

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Equality

18 of 21 philanthropists **agreed with promoting racial equality**

(with gender and income intersectionality)

14 reflect or try to **reflect diversity in their own organizations**

7 are actively funding initiatives that promote **racial equality**

Only 3 expressed that equality was not a lens for their philanthropy

Trust

15 of 21 philanthropists agreed with the **importance of trust-based relationships**, and recognizing the **expertise and** knowledge of **local organizations**

21 of 21 professionals and experts agreed with the **need for more trust-based relationships**

Embracing trust-based philanthropy and prioritizing local knowledge

The idea behind trust-based philanthropy is that philanthropic organizations should trust their partners, especially those that have lived experience or proximity to the communities and the issues being addressed. It implies a certain recognition that philanthropy is not meant to be directive, but rather supportive of civil society and that local organizations most likely have more expertise in certain issues than philanthropic organizations. While the six practices contained in the Trust-Based Philanthropy Project's approach - give multi-year, unrestricted funding; do the homework; simplify and streamline paperwork; be transparent and responsive; solicit and act on feedback; and offer support beyond the check - are helpful, it is still difficult to fully describe the quality of the relationship philanthropy should establish with the organizations it supports.²⁴

Overall, interviewees had mixed opinions as to whether Brazilian philanthropy is embracing trust-based philanthropy. Among philanthropists, only three out of 21 mentioned trust-based philanthropy unprompted. There is also a general misunderstanding in the philanthropic sector overall that trust-based philanthropy means you just give the money and do not care for the results, or that the organizations have no accountability.

However, at least 15 philanthropists interviewed agreed with

the importance of trust in relationships with organizations one supports and also the importance of recognizing the expertise and knowledge of the local organizations. It is worth remembering that the sample of philanthropists interviewed tend to be the more progressive and are probably not representative. Some raised a concern about who is deemed trustworthy, based on the philanthropists' ideas of accountability, and some also connected this to the wider idea of systemic change. Finally, a few raised the difficulties in trust not just towards non-profits, but in general towards institutions in Brazil.

Professionals and experts also added their perspectives regarding trust in non-profits and the need to value local knowledge and expertise. 21 of them expressed the need for more trust-based relationships by lowering controls, listening more, valuing local knowledge and expertise and having an overall more horizontal relationship. Some mentioned the difficulties in describing a real partnership, and the fact that funders can usually contribute beyond funding, not by controlling but by constructively challenging and offering a different perspective, and acting as a thought partner to the organizations they support. One professional in particular, expressed very poignantly how trust is apparently usually reserved only for peers by philanthropists.

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I hope that everyone understands that as long as racism and gender discrimination are not solved, we won't solve anything else as all the other issues are connected to this, and the changes have to be structural. You can't solve everything, but at least aim to strengthen the leadership, and civil society and encourage public agencies to consider this.
- Philanthropist

We need to understand that the system we live in generates social inequality and social inequality generates the system we live in. And the ones who are going to get us out of this are the black and poor people when they can articulate the solutions they know. Because I think that we understand very little about how oppressive this system is. - Philanthropist

There was a whole historical movement since the end of the 19th century, to make people believe that 'here there is no such thing as black and white, here in Brazil we are all mixed'. So, an idea was created of a racial democracy that doesn't exist. - Professional

You only understand privilege when you are on the other side, and white men have never been on the other side so they resist it. And the decision about the money is in the hands of the men of the family, the old men. It's not in the hands of the women or the new generation. - Professional

Then I ask the foundation: 'This is your team? This is the team who is taking the decisions? You are thinking to change the world with this team?' I'm not talking about if they are clever or not - they're not representative of our society.
- Professional

No matter how much the foundations recognize, for example, racial and gender inequality, when you look at the structure of the organizations, they are still mostly run by white men. That is, you have little openness for diversity in decision-making positions. The third sector has many women but few women in leadership. - Professional

On gender we are doing better in Brazil. From a business perspective, in terms of participation in the workforce, we are getting there. From a race perspective, I think we are on the other end of the spectrum. Social justice for race is probably the biggest target. - Philanthropist

It is important but it's not critical. I will not judge a project or an organization because of that. Not my topic. - Philanthropist

'No, we are not racist because we treat everyone well. Here, there are no conflicts like in the US. South Africa was so much worse. And here in Brazil, we are a very mixed country.' But there is certainly racism - but we can't admit it. We like to help the most disadvantaged ones but we don't truly want to change things. - Professional

Philanthropic institutions in Brazil are extremely white. Very few philanthropies have an internal diversity policy. And philanthropists also tend to be white and privileged. In our Board, the discourse is stronger than the action. - Professional

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We have a very close link with our communities. That's because we have constructed our work from the start with them. To control does not make sense - we just don't do that. Our check-in, in the middle of the project, for instance, it's not framed as control it's 'how can we help?'. And it's helping to develop our citizens.
- Philanthropist

To my surprise, recently I found that trust-based philanthropy as a subject is being raised in seminars and I could participate as a philanthropist, but I don't think that it is a trend. It's something that's just starting of giving money without so many restrictions and trusting that the organizations will be able to solve their own problems. - Philanthropist

We started to shift from charity to philanthropy, towards more professionalization and to focus on social development. And now we've been talking a lot about trust-based philanthropy. I am hearing more and more about it but I think I'm in a bubble also of the people who are more like me, usually women, more mature philanthropists, who want to engage and get into a relationship, exchanging with the organizations they support. - Philanthropist

Trust-based philanthropy has always made a lot of sense to me. On the other hand, we also seek to monitor results. And there must be still a certain rigor. I think this is also part of the contradiction of philanthropy. - Philanthropist

I prefer a relationship of trust and I always donate unrestricted institutional money so they do whatever they want as they have more knowledge of where the money can have the most impact. I like to do this because very few people donate like that - nobody wants to pay for the rent! - Philanthropist

We have this project in a different region of Brazil, and we thought, we have the best system in that field and we have to go there and show them. And then you go there and you find out that the locals know the culture, and if you don't include them and give them the leading position, they always feel that this comes from far away and it is not their culture. Everything has to be bottom-up and has to come from the people to succeed. - Philanthropist

I think that the only way that accountability is done is by numbers and written briefings. Leaders from the communities usually don't know how to do that and only organizations which are very well prepared, and have people available to write those reports, are deemed trustworthy to receive money. And in that gap, I try to enter with my way of doing philanthropy. - Philanthropist

I am working on a specific topic with a large alliance of leaders to be able to talk and build a shared vision, and produce knowledge to support the changes. Many grassroots organizations are connected with their reality and thinking about solutions. So, you give access to those who wouldn't have access to this circle of financial resources and knowledge. To act systemically, you need to act in a network. - Philanthropist

I worked at a non-profit, and I could feel it in my veins, the lack of trust. I couldn't understand why people would look at us and try to control us, and always look at us with this lack of confidence.
- Professional

The distance from reality is for many philanthropists very big and the solution that they think is the solution is not the solution. - Professional

Because philanthropy is independent of the rules of the political and financial system, it has a freedom of action and could be more radical in the way it allocates its resources. Here in Brazil, trust-based philanthropy manifests itself as patrimonialism- it means only trust is in one's peers. I worked for a foundation and was called into a meeting where two white men spoke to the philanthropist 'Ah, my son is at your granddaughter's school, you know?' In one meeting, they get R\$ 1,000,000 approved without a business plan, budget, or delivery schedule. For other organizations, we would require many meetings, and an elaborate proposal with detailed budgets. And the ceiling of support was R\$ 400,000. But others can walk out with R\$ 1,000,000 - they should not even be potential grantees because they are already accessing resources from a very privileged place. This trust that is reserved for philanthropist peers guarantees the maintenance of inequality even in philanthropy. - Professional

We are an extremely unbelieving nation because we never see money being well spent. There's also that culture of 'if I'm going to give money, who knows what they'll do with it'. As Brazilians, we just can't trust. - Philanthropist

Doesn't matter if it is family or corporate philanthropy, but philanthropy behaves as if it has more knowledge, more capacity, and knows what's best. We need to recognize that there are people that know the solutions much better than us.
- Professional

Trust-based philanthropy means lowering the controls, listening more, and having a more horizontal relationship with the organizations. Also understanding that an organization has no obligation to do things in the time we want. And trust enables innovation and the capacity of organizations to change for more impact. - Professional

In human rights there is a strong recognition that organizations need to have more agency, more autonomy, longer-term and more funding, more flexibility, less restrictive projects, and low reporting requirements. Those are all descriptors of our grants but there's more when we talk about trust-based. When you can create a space for exchange not to justify the existence of the funder, you can have a very significant role listening and giving a different perspective. It's not directing, it's a real partnership, but the elements that make up for a trust-based relationship are not so easy to identify - they are very subtle things. - Professional

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6. Systems Change Philanthropy



Some progressive philanthropists are recognizing their privilege, addressing power dynamics and inequality, and encouraging systemic changes, by supporting a strong and independent civil society.

Recognizing privilege

Most interviewees across the board understand the fundamental contradiction at the heart of philanthropy. Our socio-political and economic systems allow some individuals to amass fortunes, in some cases without regard for the environment and fellow human beings, and then 'give back' a relatively small portion of their wealth through philanthropy. An important element to be willing to support systemic change on a larger scale is for philanthropists and their foundations to confront their own privileged position in the system, regardless of whether they benefited from the system actively or passively. Among all interviewees at least 33 brought

up their privilege unprompted. At least 15 philanthropists were fully aware of their privilege and many said that their engagement in philanthropy was motivated by this awareness. Some also saw their own privilege, not only in levels of wealth but even in their ability to engage in philanthropy and volunteering, or other forms of privilege. At least 18 professionals and experts brought up the realization that they too are in privileged positions unprompted.

33 of 42 interviewees recognized their privilege

and brought up unprompted

15 of 21 philanthropists believe in supporting systemic change

and do for at least part of their philanthropy

5% estimated part of Brazilian **philanthropy that focuses on system change**

12 to 15 is the estimated number of progressive philanthropists

Are supporting systems change

Are willing to address the power dynamics in their giving

Are supporting the development of a strong and independent civil society



I became a philanthropist, as I understood I should share my privilege because I have money to fund the things I care about. – Philanthropist

I see a lot of doing, but not addressing the most profound issues of our culture, our history, and our way of being, and that has to change because there's so much privilege, and we have more than we need, definitely much more than we need.

– Philanthropist

This colonizing top-bottom approach is part of the culture in Brazil. Not asking people what they need, what they want, what is important for them, and just assuming from one's perspective that it's the best because I'm giving that so they should be grateful. But this point of view is still, unfortunately, the mainstream.

– Professional

It's difficult to overcome the power dynamics of someone who has a lot of money and one who does not and needs it. We have a group of NGOs working with us with mitigated power dynamics and trust building, working upon an open and transparent framework for development where they choose their own paths. We have the commitment for at least five years with them, with fixed amounts of money and monitoring being done by both sides. Trust building demands dialogue, hearing, sitting down, and talking, and not just coming up with a framework. It is not easy but we strive towards that.

– Professional

We are not talking about changing the whole socio-economic system of Brazil, because changing that is scary. And many of our families and our wealth benefited from that system. – Philanthropist

One of the movements I was part of, it's all white women from the third sector. We started to talk about bringing diversity into the committee, but at this level, we are all volunteers. So, we had to think about it because volunteering is a privilege, and not everyone can do that. – Philanthropist

Poverty is not a lack of money - it's also a mindset. We need to face poverty with empathy and recognize that poor people also have power and dignity. So now we never call them vulnerable anymore. Social transformation only happens when the communities become the protagonists of their own change. – Professional

It's not only how much you're giving and for what you are giving, but how you are giving. If you want to change the asymmetries in power in our society, you have to be able to establish a relationship with less asymmetry. You will always have power. You can acknowledge that, and make that part of your own reflection. And understand how difficult it would be for an organization to which you give money to speak back and tell you that this is not the right way, or you just don't see it because you don't have the experience. What are the channels that you have opened to listen to partners? How many times do you invite people to tell you a different view? – Professional

I realized that what we do as a philanthropic organization impacts the sector. There is the power that philanthropy has to institutionalize practices which is our greatest capacity to influence. What we say, the other does and that will take time to change, because of the power relationship. – Professional

I don't know if it's because of the horrors that we lived in the last four years, but philanthropy has realized it's not enough just to run programs to benefit specific populations and offer the basics. There is more openness to talking about difficult issues, such as racism, sexism, or the naturalization of violence. They start to embrace structural and systemic issues in our country. We cannot move forward with democracy, with social justice, if we don't address these issues. – Professional

Systems change is the biggest trend. Over the last ten years, it has really become a conversation among our peers, more evident, clear, and vocal. We push for public policy change, to address root causes. We have become more humble and understood that it's not about projects and that we might need to work alongside our peers and other actors. We have learned to not just sit in our high chairs and say what needs to be done without understanding the local realities and without establishing that trust relationship that is so important. – Professional

I see two ways of approaching systems change: one is that you support organizations as you understand that change will happen when actors are more empowered and have the means to make their own decisions to promote change at different levels. The other is a more orchestrated approach, developing large and comprehensive strategies with various players. I honestly don't know which would be more effective, but we have chosen the former. – Professional

We need to discuss systems change, and understand what kind of change we want. So, we create another way of thinking about a collaborative approach. Let's bring together a group of not only philanthropists but also organizations with a common view, that we really try to measure impact and try to create knowledge that we are going in the same direction. – Professional

I see a willingness to move in that direction. But systems change? We are far from it. Our plans are very short-term.
– Professional

In Brazil, I don't think there is that level of sophistication for systems change philanthropy. We are just so pleased that anybody's giving any money. And if you see how little they're giving for civil society it's really hard. I think Brazilian philanthropists don't believe in the power of civil society as a changemaker. – Professional



Addressing power dynamics

The power dynamics in giving were discussed with the professionals and experts. The giver usually has the power, and many times, despite the best of intentions, it is difficult for funders to understand how this power imbalance affects their relationships with the organizations they support. Part of the answer lies in listening more and also asking more to

genuinely understand what partners want, as opposed to making assumptions based on what they think they need or believing that as funders they know better. The importance of recognizing philanthropy's ability to influence others and shape the sector was also noted.

Supporting systemic change in specific fields

Concerning systems change philanthropy, 15 out of 21 philanthropists believe it is important and at least part of their philanthropy could be said to use that approach. Their philanthropy aims to either move government resources or support a viable commercial solution for significant scale and sustainability. But not all believe it is being practiced sufficiently. It was argued that while many would agree with the concept of systems change philanthropy, this approach

probably only accounts for around 5% of all Brazilian philanthropy. When philanthropy supports systems change, it usually focuses on a specific sectoral system e.g., systems change for early childhood development or primary education. Professionals and experts are divided in their views, as some see that systems change philanthropy is happening, and even discuss the detailed approaches to systems change, while others doubt it is happening.

Addressing inequality by changing the system

Most interviewees concurred that the biggest issue in the country is inequality, but very little philanthropy focuses directly on it. Yet philanthropy cannot be asked to change the whole socio-political and economic system of a country, and by itself, it couldn't possibly play such a large role in wealth redistribution as to have an impact on inequality in a country the size of Brazil. Nevertheless, initiatives like unconditional cash transfers, or universal basic income²⁵ have been cited as one way in which philanthropy can help address poverty, and indirectly inequality. Many of the philanthropists interviewed understand these issues and noted that sometimes they do not believe their resources are sufficient to address inequality directly. Many also believe that true philanthropy is not about 'charity' towards poor people, it is addressing at a structural level the provision of equal opportunities for all Brazilians.

While philanthropy can take on various roles, in a country like Brazil, with its particular history and stage of development, a key part of its role is supporting a thriving and independent civil society. Civil society is the backbone that helps societies to develop and to institutionalize progress. Philanthropy can

certainly have a role in funding the development of strong and independent civil society organizations, who over time will demand the rights that all Brazilians deserve and will demonstrate different ways to deliver what Brazilians need.

On their side, many of the experts and professionals spoke about the power structures in society and the importance of having a systemic view, as well as being aware of their own roles in the system. They recognized the role of philanthropy is not to 'paternalistically' help the poor or disadvantaged – rather to address the structural discrimination of Brazilian society and that the best use of philanthropy in such a context is to support civil society. Overwhelmingly, most interviewees spoke of their wish for more grantmaking and support for civil society.

There is certainly a group of philanthropists, some estimated around a dozen, who are progressive and are supporting systems change. Some interviewees described them as those that are willing to take an active role and address the power dynamics in their giving by supporting the development of civil society, rather than imposing their visions.

The **biggest issue** in the country: **inequality**

But **philanthropy alone cannot change** the entire **socio-political and economic system**

Yet it **can support** the development of a **thriving and independent civil society**

Which can **help address structural discrimination**

And provide **equal opportunities for all** Brazilians



I think it is challenging, because even if I tell you inequality is the biggest problem, all my money and my whole family's money is not enough to change it, and all the others are not contributing either. - Philanthropist

I think philanthropy can push some agendas, but it's not a revolution in the city. It is a result of the accumulation of wealth and we cannot look at it without this idea of inequalities and poverty that is part of the system. It's the bad dimension of philanthropy, and we have to take this into account. - Philanthropist

The realm of philanthropy could take on these structural issues that create a lack of opportunity for all of us Brazilians. If it's pure philanthropy, it's not just about helping poor people, it's simply making up for this lack of opportunity. It's getting people to organize themselves to make it happen. It's supporting civil society. - Philanthropist

We always think that the problem is not ours. The problem is the poor people. The problem is the north of Brazil. The problem is this politician or that politician. The problem is the rich. But we are society and we all together are the problem. We need to make choices, and own our role in the problems. We need to be inside the problem so we can construct a solution. - Professional

Just trying to be fair with people understand that no one is born as a felon, but we are exposed to a broken system and some are more exposed and some less. And how can I make a judgment on somebody that grows up in a slum with no sanitary conditions? We have to reframe our mindset because if we don't, we're not going to be paying for the kind of justice that we want to see. - Philanthropist

I think that many wealthy people in Brazil think they deserve to be in that position. Why should they deserve it? 'Oh, I worked so hard to get to where I am and everybody can work hard like me.' If only they could understand that every Brazilian 'deserves' opportunities. It's not charity, it's not philanthropy, it's their right. - Professional

I think that it reflects how they see philanthropy as just this small side of their life, as in 'I'm doing some good here and it's all I can do'. Let's face it, it would be very difficult for philanthropists to take on the whole system. - Professional

It is a challenge to have a systemic view. It's easy to have a foundation and get to do nice work in your sector or agenda. But we are doing philanthropy in Brazil where we have races and inequalities, and civil society organizations that must be strengthened. Many philanthropists just want to contribute to projects and don't want to take a position. But I think it's not enough anymore because not taking a position is already taking a position. - Professional

We have a huge concentration of wealth in the hands of a few people and we also have the resurgence of forces that are authoritarian and anti-democratic. Some philanthropists operate as in 'I need to put more money in some fields and I need to distribute a little more resources in some places. So I'm going to distribute basic food baskets to people, or build a school in a favela.' This doesn't change the structure. We can't address inequalities without facing the problem of asymmetry in the distribution of power and access to power in Brazilian society. The social base, civil society, and philanthropy could walk together. Some people believe that within today's political process philanthropy is playing a role in maintaining the status quo itself. - Professional

The main value of philanthropy in Brazil is to support civil society organizations and to be a partner of the government to implement new public policies with transparency. I still hear from philanthropists about the idea of doing what the government cannot do, but that is not it. If I put a lot of money into civil society organizations, they will be strong enough to talk with and if needed stand up to the government. - Professional

Philanthropy has to do a more political role for me. They should be talking about how is wealth distributed. Our minimum salary here should be B\$ 6,000. It is B\$ 1,000. First, we need to get the people a guaranteed minimum income. There are a lot of projects for minimum income and they are not approved. But we need to guarantee that. It's about human dignity and there is more than enough money in Brazil. - Professional

More grantmaking, more money to progressive causes or more systemic changes. - Philanthropist



We need stronger, more influential social organizations, capable of creating an equitable society, a fair Brazilian society. – Professional

There is a more traditional philanthropy, a philanthropy that works with an assistance-based character, and a different, more progressive, more frontier philanthropy, where philanthropy is responsible for nurturing a fertile field for action, for society to develop in its diversity, and for supporting systemic shifts. It is not necessarily responsible for implementing actions according to the vision of each philanthropist, from his economic power, because that can even be dangerous. –Philanthropist

We have a very small group of donors, maybe ten or twelve persons, whom I call the progressives. They support deeply not only financially, but also by being members of the Board. They are very committed, they work with trust, they listen more, they are well connected, and they open doors in government. They support advocacy and organizations that are changing systems. These organizations were only supported by international funders in the past and now they get support from these Brazilian donors.

– Professional

One good thing is that we have progressive philanthropists who are using their names and their political power. They are spreading the word and trying to convince others to do things differently. They are trying to push towards what we call systems change, in a more critical view, looking at the externalities of their actions and not just the traditional mindset that says 'Okay, I'm getting richer and donating a small part of my assets.'

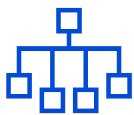
– Professional

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It is simply that **our social and economic structures do not value equal opportunities. Philanthropy is purely and simply correcting the structural problems,** for which, in some way, **we are all responsible. So, everyone can have opportunities they** deserve to be the authors of their own destinies ”

– Philanthropist

7. Philanthropic Sector



The philanthropic sector has become more professional with strong backbone organizations, while the non-profit and civil society sectors need further support and development.

Professionalizing the philanthropic sector

Most interviewees agree that the philanthropy sector in Brazil has certainly grown and become more professional over the last few years. Furthermore, there are strong organizations that support philanthropy in a strategic way, as described in the box 'organizations supporting philanthropy in Brazil' which includes key organizations such as membership organizations, research and academic organizations and consulting entities.

The philanthropic sector has been described as mature, strong, professional, qualified, and utilizing best practices. But on the other hand, it has also been described as a small sector that operates in a 'bubble', where sometimes deeds do not align with discourse,

that tends to concentrate funding with a narrow focus in a few areas, and in some cases, on a few large non-profits. Some have raised issues with lack of training opportunities for people going into the field and those already in it. They have also raised the need to recognize the sector's own power to institutionalize practices and convene others. A key point was also made about the unique nature of Brazilian philanthropy – in terms of developing its own identity, which can learn and share with philanthropy in other parts of the world, as well as remembering the huge diversity in Brazil.

The philanthropic sector

Seen as

Mature, strong, professional, and utilizing best practices

With strong organizations supporting philanthropy

But operating in a small “bubble” and facing challenges

Lack of training opportunities

Need to further recognize sector’s power

Need to develop a unique Brazilian identity

The non-profit and civil society sector

Faces additional challenges

- Pervasive lack of trust and confidence in the sector
- Being held to different standards than businesses

Priority developmental needs

- Improving the quality of management across sector
- Accessing additional unrestricted long-term funding
- Additional training on how to influence government

Developing the non-profit sector and civil society

Most interviewees concurred that non-profits and civil society overall face a number of challenges and have developmental needs. A previous report from 2015 identified several barriers to greater giving, including a lack of confidence in the non-profit sector²⁶ which still appears to be prevalent. At the same time, a key reflection is the level to which non-profits are held to different standards than businesses, and the fundamental lack of trust or confidence that has been cited previously. Most important would be to develop the ability to raise additional unrestricted, longer-term funding, and countering conservative ideas regarding not paying for marketing or not incentivizing managers of non-profits.

The need to improve the overall quality of management in the sector has been acknowledged. Non-profits in Brazil are

also not sufficiently putting forward well-developed systems-changing proposals, while simultaneously, there would not be many funders willing to support them in this way. This issue is true not only in Brazil but globally. Professionals and experts commented on the fact that now, a fundraising market exists in Brazil for non-profits. However, few non-profits are willing to raise issues such as the low level of funding offered and the level of restrictions imposed on them for fear of losing donations. There is also a need to provide training to non-profits about how to work on influencing government or changing public policies. Related to this is a concern about how to make the contributions of the sector more visible, given the lack of data.

“ I think we have a **mature field** where you have a lot of contributions, but also good practices and examples of how you can deliver a philanthropy at its best. But at the same time, **it's a very restricted field** and **we're speaking to ourselves in a very small group as a bubble.**”

– Philanthropist



We have the big foundations and company foundations and family foundations, and most of them are very well organized and they hire good, professional people.
- Philanthropist

I would say, we now have stronger foundations and organizations, but we don't have capital really moving in low-income communities. - Professional

Philanthropy in Brazil produces another type of concentration of resources. When they go to make their donations, they look for organizations that are already big, that already show great results. So, there are very few organizations that receive a lot of resources in some specific agendas - Professional

Some parts of civil society have become very professionalized, they have created methodologies, they have gathered experiences, they produce knowledge, and they are still very connected to the movements. The agendas that are created, the support lines, are totally linked to the needs of the field and that is great. On the other hand, new concepts start to appear and people incorporate them in their speeches, in their narratives, but not in their actions. - Professional

The teams of the funders have limited knowledge about how to do philanthropy, how to have more impact and have long-term investments. There isn't a big offering in Brazil for a person who is going to work in the philanthropy sector to be trained in a university to learn about their role and the best methodologies that exist.
- Professional

We need to coordinate sectors for solutions, together with the public sector and the third sector, all together. Philanthropy and philanthropists can arrange discussions, because they are in a very privileged place to say 'Come here for the mayor. Let's talk together what we can do together. You do this, and we'll do that, and together maybe we can move on' - Professional

They do not believe in non-profits because we had terrible examples in the past, and when there is bad practice, everybody says. 'Do you remember?' I say, 'Wow! But do you remember the many corporations that also had problems? And you are investing in the stock market in New York?' So, we have a confidence problem. - Professional

We should learn with others' experiences, but we should not just import practices. We should build this specifically Brazilian mindset. It's not even Brazil as a country, but it's the specific regions and circumstances, because there is a very big difference with a Federal country like Brazil. - Professional

The people working in philanthropy are pretty qualified. It's more than in the non-profit sector in general, there are some dogmas like, you're not supposed to spend so much on marketing, you're not supposed to spend a cent in your core organization or head office, which is ridiculous. I know no one wants to fund the not-fun part of it, the operational side of it. And we don't get incentives for the best managers to go into non-profits. - Philanthropist

I still don't see inside these organizations a lot of capabilities for working with public policies. It is important to work on issues that mobilize society and to work with the underlying infrastructure of society, such as an independent media - but working on these issues is not fancy. - Professional

They tend not to put their standards to the philanthropists and do not say 'Well, you're giving me R\$ 50,000 for one year and this doesn't work. We need at least this amount and we need it for multiple years.' Most organizations are just so grateful to get something that they do not come back and say, 'well, it could be better'. I also think civil society needs to step up. - Professional

A problem is the lack of data - not just in specific fields but overall. E.g., how big is the third sector in the economy of Brazil? How many employees it supports? Where are the people that need help? We just don't have numbers. - Professional

The quality of the management is not great in most non-profits and it's just a challenge. - Professional

The other thing is, ten years ago there wasn't a market for fundraising, so there was no crowdfunding site. There were very few consultants and organizations that could add a giving button on their websites. There is now this structuring of the field and it's very important. - Professional

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Organizations Supporting Philanthropy in Brazil

The summaries below cover the key organizations that support the philanthropic sector in the country, which include membership organizations, research and academic organizations and consulting entities.

Grupo de Institutos, Fundações e Empresas (GIFE) (Group of Institutes, Foundations and Companies).

Created informally in 1989, and formally in 1995, it currently has a network of more than 160 members who together contributed R\$ 5.3 billion in social investment in 2020, according to data from the GIFE Census. The organization understands private social investment as the voluntary transfer of private resources in a planned, monitored, and systematic way to social, environmental, cultural, and scientific projects or organizations of public interest. GIFE operates with a mission to improve and disseminate concepts and practices of the use of private resources for the development of the common good. It aims to contribute to the promotion of sustainable development in Brazil, by means of political-institutional strengthening and support for the strategic performance of institutes and foundations and other private entities that make voluntary and systematic social investment in the public interest.

www.gife.org.br

Instituto para o Desenvolvimento do Investimento Social (IDIS) (Institute for the Development of Social Investment, or IDIS)

is a public interest civil society organization founded in 1999 with the mission of inspiring, supporting and expanding private social investment and its impact, they work with individuals, families, companies, foundations and corporate and family institutes, as well as civil society organizations in actions that transform realities and contribute to reducing social inequalities in the country. Their work is based on the tripod of generating knowledge, consulting, and carrying out impact projects, which contribute to strengthening the ecosystem of strategic philanthropy and the culture of giving. IDIS defines private social investment as the voluntary and strategic allocation of private resources, whether financial, in-kind, human, technical, or managerial, for public benefit. IDIS believes that to promote social transformation, this investment needs to be made with strategic planning anchored in data, with predefined indicators, careful execution, monitoring of results and evaluation of its impact.

www.idis.org.br

Stanford Social Innovation Review (SSIR) - Brasil.

Launched in 2022, Stanford Social Innovation Review Brasil is the Brazilian edition in Portuguese of the worldwide reference publication in social innovation.

Originally published in 2003 by the Center for Social Innovation at the Stanford Graduate School of Business, SSIR has been published by the Stanford Center on Philanthropy and Civil Society (PACS) since 2010. It was brought to Brazil by a group of philanthropic institutional sponsors, including Humanitas360 Institute, José Luiz Egydio Setúbal Foundation, Samambaia Filantropias and Movimento Bem Maior. With deep local knowledge and accessible language, the magazine SSIR Brazil will publish translations of some of the best articles from SSIR USA, other international editions of SSIR, as well as Brazilian articles. SSIR Brasil aims to become a platform that brings together the academic community, professionals from the third sector, private social investment, social movements and the broader public interested in social innovation in Brazil.

www.ssir.com.br

Worldwide Initiatives for Grantmaker Support (WINGS).

Launched in 2000, WINGS formalized its organization in 2010 and is headquartered in São Paulo, Brazil. It is a network of philanthropy development and support organizations committed to ensuring philanthropy reaches its fullest potential as a catalyst for the transformative social change necessary to build a more just, equitable and sustainable world. Their growing community of thought leaders and changemakers includes more than 190 member organizations across more than 50 countries. WINGS works to ensure philanthropic actors around the world have the knowledge, tools and supportive environment to create transformative change at an individual, local and global level. Specifically, their work is organized in three impact areas which in their view, together, offer the greatest potential for creating lasting systemic change: collective intelligence, strengthening ecosystems and advocacy and policy. Although WINGS is a global organization, the decision to be headquartered in Brazil also helps the Brazilian philanthropic sector.

www.wingsweb.org

8. Increasing Philanthropy



Increasing meaningful collaboration and improving the legal and tax environment for philanthropy could spur considerable growth.

Increasing meaningful collaboration

Most interviewees (34 out of 42) wished for further collaboration. Brazilian philanthropists overwhelmingly believe that greater collaboration is a key priority and they recognized the need to align their work and reduce the dispersion of efforts in the sector. Some pointed out that they are part of some new WhatsApp groups that aim to promote more collaboration in philanthropy. Globally, there is an increase in collaborative philanthropy, and this trend is also present in Brazil.²⁷ However, collaboration in philanthropy means different things to different people and it is not the same as cooperation. There is a whole spectrum of collaboration, from knowledge exchange to aligning strategies but funding independently, to pooling funding, and many options in between. The form of collaboration that can most support systems change philanthropy is co-funding or pooling funding. In our sample of 21 philanthropists, at least 16 are already co-funding with others. Some philanthropists pointed out the huge dispersion of efforts in the sector and the need for greater collaboration. They also raised the fact that most philanthropists prefer to do their own thing, and usually launch their own initiative without first considering if somebody else is already doing something

similar. Among the professionals and experts, at least 18 cited collaboration as the most important development for Brazilian philanthropy. The box 'philanthropic collaborations with Brazilian philanthropists and foundations' includes several examples of collaborations that involve co-funding by at least one philanthropic funder from Brazil. They span diverse topics including early childhood development and ending violence against children, climate change, conservation, education, social change, and social justice.

The professionals and experts all agreed with the need for greater collaboration which could help in terms of efficiency and accountability, as well as hopefully lead to greater impact. However, their views were more nuanced as to whether collaboration is really happening in Brazil, and whether when philanthropists say 'collaboration' they really mean somebody else giving money to their own initiatives. Some were quite honest about how difficult it is to collaborate in practice – due to issues of ego or attribution and ultimately giving up some degree of control if you work with others. Overwhelmingly, most interviewees spoke of their wish for further collaboration in philanthropy.

Aligning the legal and fiscal environment

While most agreed that the fiscal regime should not be the main driver for philanthropy, 33 out of 42 interviewees argued it can help increase giving and saw the legal and fiscal framework as one of the top three issues holding back philanthropy. While the decision to give is not usually influenced by tax deductibility, the amount given tends to be higher where there is a tax deduction, and sometimes a specific organization is chosen because of its ability to provide a tax deduction. There was broad agreement across

interviewees that a better legal and fiscal environment could help encourage more giving, yet the specifics varied. Some argued to remove the extra tax that people have to pay on top of donations. Some argued that while tax deductibility is desirable, in Brazil it would be subject to corruption and difficult to certify. Yet others argued for a higher inheritance tax, or in general just raising taxes for wealthy people.

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I think there are a lot of Brazilian entities, most of them are very small, driven by one person or a small group and always struggling. But really there are very few, very good bigger organizations. Organizations don't get together because each one thinks he does it best and does it his way. I think there is a huge opportunity to put these organizations together, work together for the same thing, much bigger in scale, much more efficient. This is something we could improve a lot.

- Philanthropist

I think that a lot of philanthropists want to make their own initiatives so they don't look to the side and try to see there's someone doing the same thing, and if they can join. Maybe they should stop and think about why I'm going to start a new foundation. People are starting to think more about it. - Philanthropist

I decided I wanted to make grants from the start. So, with my kids, we did research and arrived at four areas. And I hired professionals to do it the right way. I thought we are entering a place where there are many people already inside. 'What are we going to do and with whom are we going to unite?'

- Philanthropist

Three of us joined forces and were the seed donors just to get that particular philanthropic initiative started. There needs to be a pooling of resources. There cannot be any ego in philanthropy. Very slowly I'm seeing collaboration growing, but the needs are so big.

- Philanthropist

I think there are many people doing good, but each one is doing their own thing. It is like if you have many people going to a beach but each one is in a single boat. It would be much more efficient to share a bigger boat with many people. It is not only in Brazil; philanthropy goes through this all over the world. - Philanthropist

Sometimes it depends on how the philanthropist starts, if he does his own project and he has his own idea for his own ego or if he is thinking bigger. We are thinking what is the best we can do? Where can we really make a change? I need to work together with others and bring everybody on board so the results will be much bigger. But I know many people that prefer that little project that won't change anything. I think collaboration is growing but it's growing very slowly.

- Philanthropist

I believe in excellence and collaboration. When you drive for excellence and collaborate with the best, the results come. This is something I believe is changing in Brazil, especially in the larger foundations. - Philanthropist

Many of the foundations talk about collaboration, and they say they are supporting one another. Everybody wants to congratulate one another even if they haven't done anything real together. - Professional

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The idea of collaboration it's that I have my project and I'm going to look for another philanthropist so that he can invest in my project. But collaboration is not that. - Professional

We are in a discussion with another family - they're doing something similar but it is not clear yet how we could collaborate. More so than the ego of having your name, it is the idea that this is my initiative and each side thinks that the other should fold into theirs. And it is more complicated than one family doing everything by itself, which would have certain results. - Professional

They cannot collaborate, even inside is really hard because most organizations need to ensure that there will be attribution to their work. But if you look at systemic challenges it's impossible to address them alone. You can bring your uniqueness in a piece of the work, and have others complementing with research, advocacy, public education, campaigning, or communications. But collaboration doesn't happen enough as it's very hard. - Professional

People want to be protagonists. They want to say 'Oh, I did this'. This creates a lot of inefficiencies because you replicate multiple structures and you are not fully critical about the results as it is your baby project. You don't want to analyze it independently and find out whatever is wrong, so you keep funding it. I think that collaboration would increase efficiency and accountability as multiple donors would want to measure the performance of philanthropic efforts. - Professional

As a funder, you don't have to create your own project. You can fund others, support diversity in the field and expand the number of organizations working on certain agendas. When you create your own project, you are competing with organizations that already have more experience and sometimes you have two organizations running very similar projects. And because we don't have collaboration, it creates a waste of money. - Professional

I would change the way people work together. – Philanthropist

I would enhance the collaboration model. For people to sit down and dialogue more, to put things up front. It's difficult as in our culture people are not straightforward. It's not only more money we need, it's a culture change.
– Professional

Until Brazil creates conditions and incentives for people to help, we will absolutely not be able to get out of the stage where we are in. You can't deduct it from your income tax. It's something the government does nothing about, it could create conditions for people to get involved in philanthropy. – Philanthropist

I would like more deep collaboration, towards systemic change and less polarization within the philanthropic sector. More deep listening, and having that capacity to understand different visions and understanding that diversity is not just about gender and race. It's about a point of view as well. People only come closer to the ones they can relate to, and that's not going to bring us the best outcomes. – Professional

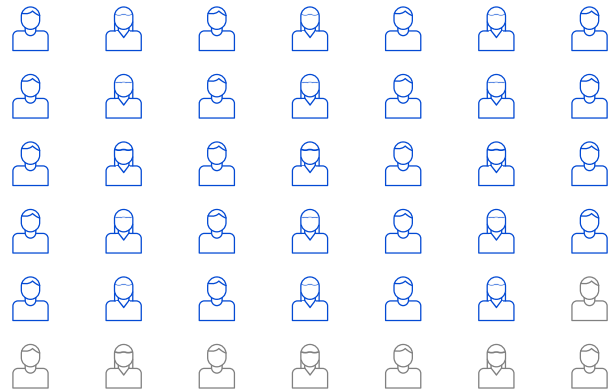
Let's tax huge fortunes, and let's give more incentives to donate. We are one of only three countries in the world that taxes donations. If we don't put some kind of incentive to build a better society, it's not going to happen. – Professional

If you have money and you die, the inheritance goes through your family without paying almost anything. On the other hand, if you have 40% taxes, it's much better to have a foundation, because then you can carry on your family name as a foundation. I would raise the inheritance tax to create an incentive for the creation of foundations. – Professional

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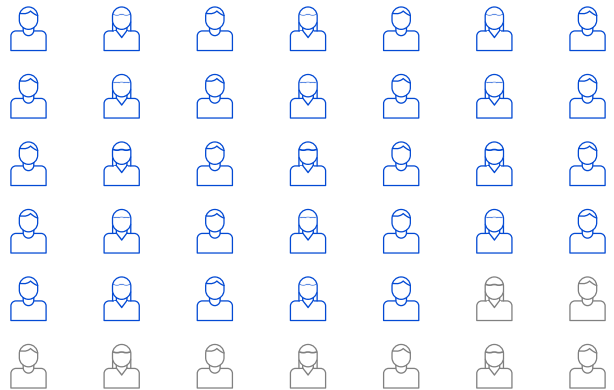
34 of 42

Focusing on increasing meaningful collaboration such as co-funding or pooling funding or at a minimum aligning efforts



33 of 42

Improving the legal and tax environment for philanthropy but the specific recommendations regarding taxation varied



Philanthropic collaborations with Brazilian philanthropists and foundations

Below are several examples of collaborations that involve pooled funds with the participation of at least one philanthropic funder from Brazil. They span diverse topics including early childhood development and ending violence against children, climate change, conservation, education, social change, and social justice. This list is by no means exhaustive.

Co-Impact

Co-Impact is a global philanthropic collaborative established in late 2017 that sources and supports locally-rooted coalitions working to achieve impact at scale in the Global South. To achieve this, leaders with powerful ideas need the size and nature of support to go beyond singular interventions and allow them to focus on deep systemic change. Co-Impact has one Brazilian philanthropist within its donor community and overall, over 45 philanthropists from 16 different countries who have pooled hundreds of millions of dollars. Co-Impact is funding a number of initiatives in Brazil in the themes of education and gender equality.

www.co-impact.org

End Violence Against Children

Formally called the Global Partnership and Fund to End Violence Against Children, it is a platform for collective evidence-based advocacy and action created by the United Nations Secretary General in 2016. It constitutes a coalition of over 700 organizations including NGOs, foundations, research institutions and private sector groups, all working together to achieve Sustainable Development Goal 16.2: ending all forms of violence against children by 2030. A number of Brazilian philanthropies are part of it including Instituto Alana and the José Luiz Egidio Setubal Foundation, and in Brazil they work together with many other organizations, as well as the Government of Brazil.

www.end-violence.org/partners

Grupo Mulheres do Brasil (Women of Brazil Group)

Created in 2013 by 40 women with diverse backgrounds it seeks to engage with civil society and promote change in Brazil. In promoting change, they also aim to stimulate and encourage female participation in their different working areas, which include expanding access to labor, security, education and health to all. The group is presided by businesswoman and philanthropist Luiza Helena Trajano, and includes over 98,000 members across Brazil and internationally. During the Covid-19 pandemic, the group and its President have been credited for mobilizing the communities across Brazil for the vaccination efforts.

www.grupomulheresdobrasil.org.br/nossa-historia/

Instituto Clima e Sociedade (Climate and Society Institute)

The Instituto Clima e Sociedade founded in 2015 has consolidated a large partnership network with the aim of encouraging dialogue and building solutions for the imminent climate crisis through good economic, environmental and social practices. They work with a range of national and international philanthropic organizations, including Arapyáú Institute and are members of Group of Institutes, Foundations and Companies (GIFE) and of the Philanthropy Network for Social Justice. They exchange experiences and learning, and explore co-financing with other institutions.

www.climaesociedade.org/parceiros/

Núcleo Ciência Pela Infância (Brazilian Center for Early Child Development - NCPI)

Founded in 2011, the NCPI is a coalition bringing together six organizations with diverse goals and specializations all working on early childhood issues. Together, they are able to provide finance resources, infrastructure, and technical as well as strategic support to initiatives aimed at early childhood development. Partners include Brazilian academic institutions including the Faculty of Medicine of the University of São Paulo, and Insper, as well as philanthropic foundations such as the Maria Cecilia Souto Vidigal Foundation, and international funders.

www.ncpi.org.br/en-us/workstreams/brazilian-center-for-early-child-development/

Onçafari Pantanal Conservation Initiative

The Onçafari Association was created to promote environmental conservation and contribute to the socio-economic development of the regions in which it operates through ecotourism and scientific studies. This initiative involves purchase of strategic or threatened areas of the Pantanal region in Brazil to ensure their preservation through the management by Onçafari. A number of Brazilian philanthropists jointly support this initiative, including Teresa and Cândido Bracher, Roberto Klabin, as well as at least three other philanthropists interviewed for this report.

www.oncafari.org/o-oncafari/

Rede de Filantropia para a Justiça Social (Philanthropy Network for Social Justice), renamed Rede Comú

Created in 2012, the network brings together funds, foundation and grant makers all mobilizing resources to support groups, collectives, movements and civil society organizations working on in the fields of social justice, human rights, citizenship and community development. By collectively engaging with these different actors, the network also allows for producing and sharing of knowledge as well as the common monitoring of the initiatives. The network includes the Fundo Baobá, the Fundo Social ELAS+, the Fundo Casa Social Ambiental, the Instituto Clima e Sociedade and over ten others. They are all examples of collaborative philanthropy in action. three other philanthropists interviewed for this report.

www.redefilantropia.org.br/

Todos pela Educação (All for Education)

Founded in 2006, Todos pela Educação is a civil society organization with the goal of transforming primary education in Brazil by promoting and demanding educational public policies ensuring equal learning and opportunities for the country's youth. In seeking to be independent from political power in order to challenge it and push for change, it is funded entirely by private sources, which include over 30 philanthropic organizations. Amongst these we find Itaú Social, the Lemann Foundation, the Maria Cecilia Souto Vidigal Foundation, and the Roberto Marinho Foundation, as well as other philanthropic organizations such as Arredondar. Its efforts have been commended by Global Giving, who ranked it among the top organizations in the world in 2021 and 2022.

www.todospelaeducacao.org.br/

9. Promoting Philanthropy



Fostering the learning and development of philanthropists, promoting a culture of giving, and increasing the visibility of philanthropic role models, could also lead to significant growth.

Promoting a culture of giving

The box 'initiatives promoting philanthropy in Brazil', describes a number of initiatives aiming to increase philanthropic giving in Brazil including some dedicated to promote a culture of giving. They comprise innovative mechanisms as well as associations, pledges, and movements. They are focused on wealthy philanthropists and also on middle-class professionals and givers.

The need to promote a culture of giving from a young age was emphasized by a majority of interviewees (32 out of 42) who also noted the absence of social pressure to give. Some philanthropists explained that many times they know each other socially in circles of a certain level of wealth, but they don't really know about the philanthropic projects of each other because it is

not the focus of their conversations. Some professionals pointed out that philanthropists do not want to expose themselves to further fundraising asks and put forward the idea that if wealthy individuals understood how much better their daily lives could be, they would give more. There has been a concerted effort by several organizations to promote greater giving. Some interviewees remarked on the importance of teaching a culture of giving from a young age and a couple of them compared this to what they had observed in the US.

Some spoke about bringing in a business mindset or growth to their philanthropy, as well as engagement beyond financial giving. But there is also a downside of bringing too much of a business mindset, which can sometimes prioritize short-term gains.

Fostering the learning and development of philanthropists

Most interviewees (32 out of 42), saw the need to foster philanthropists' development. Philanthropists learn and develop sometimes starting with charity but moving onto more strategic forms of philanthropy, with more institutionalized and professional approaches over time. Many learn by engaging deeply in philanthropy beyond providing the funding. Of the limited sample of 21 philanthropists, every single one of them got involved beyond check writing, most were quite involved personally and a few hired professionals to be involved on their behalf. Most adults usually learn by doing, so it is important to encourage people to have experiences that expose them to the reality of people in need and bring them closer to see how others go through life. Engaging in particular experiences, like learning journeys, or site visits can have a profound effect, as can having a deeper connection and interaction with social entrepreneurs. In addition, many philanthropists also underwent training and sought advice from trusted and experienced peers or advisors, especially when starting out. Almost all philanthropists interviewed spoke about their own learning processes.

Some of the discussion also covered the fact that many

philanthropists seek alignment in various aspects of their life. And when they engage in philanthropy, they also look at how their businesses are run, as well as how their wealth is being invested, and what their overall impact is on the causes they are aiming to move forward. Though some pointed out this is what should happen but doesn't always occur.

More fundamentally, many philanthropists are working on their own personal development and moving into topics of consciousness and connected thinking. Some mentioned how engaging in philanthropy is a deeply personal choice, almost a mission or their purpose in life. Some also commented on how among siblings, only some chose to be philanthropic despite having similar upbringings. Furthermore, only experienced philanthropists engage in systems change according to a different report.¹⁷ In effect, the personal journey of the philanthropist, and their willingness to support systemic change requires a certain commitment to personal development on their part to assume their own role and responsibility in the very system they are hoping to change.¹⁸



In the beginning, I helped with what they asked for and it was just giving the money. I didn't know if I could measure the impact. Only later we made it more institutional, with yearly plans and reaching scale and thinking of influencing the system. - Philanthropist

A lot of people are doing a lot of things, but sometimes, and here I'm talking about myself, I don't want to talk about that. I believe in humility. I met that lady at a lunch and have seen her socially but I do not know about her philanthropy. She is working on a difficult topic.
- Philanthropist

I see some families trying to demonstrate they are doing something. Yet people are afraid that others would approach them on the street and ask for money. It's better to have a corporate foundation. 'Don't talk to me - my company is doing all this beautiful work'. - Professional

I initially got a little bit worried as I thought they only want me because of my money. And then I realized that the biggest value that I can contribute to this non-profit is my manager experience to help them create a business plan, to communicate better, to gain more supporters. - Philanthropist

What influenced me the most is the business approach. You always try to grow things, to increase the next year, to do more.
- Philanthropist

People know each other socially because they know who they are, or which family they are from, but they rarely talk about their philanthropy. I always ask as I try to find out if there are some synergies. But I believe there is a bit of a bubble as even for fundraising events always the same people go and always the same people give. - Philanthropist

In Brazil, they don't necessarily feel the social pressure like in the US. If you talk numbers, they will probably be embarrassed. They like to show to the neighbor their helicopter or new holiday house, but when it comes to philanthropy, there's just not this culture. - Philanthropist

Some studies show very concretely how much wealthy people benefit when society gets better. How their everyday lives would be better, if they lived in a country with less inequality, less poverty, and therefore less violence, more safety.
- Professional

These donors want to make a change fast as they come from business. So many go for the smaller problems in particular regions, to make the results useful in a period of time that is OK to them. - Professional





I give a lot together with my family, I choose projects where I can get involved and this personal involvement is critical.

It's very easy to give a donation, and then turn your back. Once you get involved, it opens up a huge door, and then it just increases. - Philanthropist

Some people study to be philanthropists. I did courses too, to do it right, as you have a huge responsibility to spend this money for the best impact. We forget that educating the haves is as important as helping the have-nots. - Philanthropist

There is a paradigm that is to train philanthropists so that they understand their space, their place, and their power and challenges. - Professional

And I see these wealthy families and how poor they are in experience like they are so protected, and we live and work in our bubbles with the fear of being robbed or so. - Professional

I was taking people one by one, to visit the reality in the favelas. I had a very important lawyer who sat on the floor and cried because he saw a little girl, the same age as his daughter, in an absolutely unacceptable situation. Because we watch television about Ukraine, about Ethiopia, about crimes in Brazil, etc., but psychologically, everything is in the same package in the TV and it's far even if only one kilometer away.
- Philanthropist

We have a challenge to connect the big philanthropy with low-income entrepreneurs in Brazil as they don't talk with each other, especially entrepreneurs outside São Paulo. Some organizations arrange field trips and they can be transformational for philanthropists. - Professional

The minimum salary is not enough to live. Why don't we pay more if we can afford it? That would be much better philanthropy than just donating. Also, one of the foundations which is based on a business, if you see the truck drivers outside the factories, you would start a social project there to help them as they are being treated terribly. - Philanthropist

To be willing to do philanthropy systematically requires a level of personal development and it doesn't give you the nice immediate benefit, but it is what we need. - Philanthropist

I noticed this a few years ago because all my brothers and sisters saw my father doing this too and they do not give so much. If I ask for help, they do it, but it's different. I think it's a mission in my life. - Philanthropist

It's growing a sense that we are all interconnected because of the pandemic. And all these environmental issues that are raised help us think that nature nurtures itself in a very interconnected way, and we shouldn't accept that two miles from here people are starving.
- Philanthropist

**My intuitive path has taken me down a path of connectedness, linkages, evidence, and mobilization for power. Getting the right people together to think about strategies and talk to the government to be able to scale and produce systemic changes. Why isn't philanthropy capable of committing to something that is structural?
- Philanthropist**

Philanthropy for me is a self-realization that we are part of the system and we need to have self-awareness. You don't give because of obligation. You give because you understand you're a part of the world that you create, and you try to tackle problems or help in areas connected to your purpose in life and what is needed in the world. - Professional

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Increasing the visibility of philanthropic role models

The importance of giving more visibility to philanthropic role models was also noted by 26 out of the 42 interviewees. While discussing role models that can help to promote further philanthropy, some claimed the reason they are not public is either because of modesty and humility or in other cases because of safety considerations. One philanthropist eloquently questioned these views and explained that everyone knows they are wealthy already and she feels much safer when she donates money than when she doesn't because if she's rich and she does nothing for her country,

that is much worse. Role models stepping up is one of the best ways to promote and inspire others to do more philanthropy. And ensuring that for wealthy people it becomes socially desirable to engage in philanthropy. When asked which are the most admired Brazilian philanthropists or foundations, most interviewees coalesced around a handful of philanthropists and their foundations, yet they are only known within philanthropic circles. It would be helpful to explore how to offer additional recognition in a culturally acceptable way that can lead to inspiring others.

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We don't want to be too public about our giving, so we're more private, and we don't want to take credit or anything like that, because I really think because we're doing it for the cause and not for our ego. I actually don't even call myself a philanthropist. - Philanthropist

It took me 20 years to come to terms with that. It's my money, my family's money but it's not about saying 'Oh, look at me!' but it's about inspiring others. I've heard this very much that there's a religious idea that you should not talk about giving. But sometimes we should. - Philanthropist

The big philanthropists in Brazil are not so well known because philanthropy occupies a very small space in their lives. They do not recognize their power or see themselves as being able to intervene, influence, and act as role models for others.
- Professional

If you have more organizations pushing for it, you're going to have more people doing it and more role models, then other people are going to follow. They will do it if they see their peers doing it. - Professional

**For 70% of the Forbes list, we don't know anything about their philanthropy. Maybe they are doing it quietly. But it's good for you to tell that you donate as that can inspire others.
- Professional**

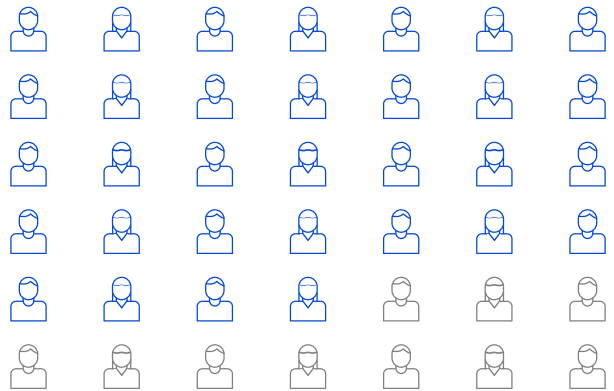
Yes, role models are important, and I have many in my life that inspired me. But the problem is that a lot of the good philanthropists don't want to show up either for security reasons or because they don't want to be on the front page. I'm not doing this to get an applause. - Philanthropist

There's always a need for recognition and the thought of legacy. We need to recognize philanthropists in a way to also make it socially acceptable and desirable to give more.
- Philanthropist

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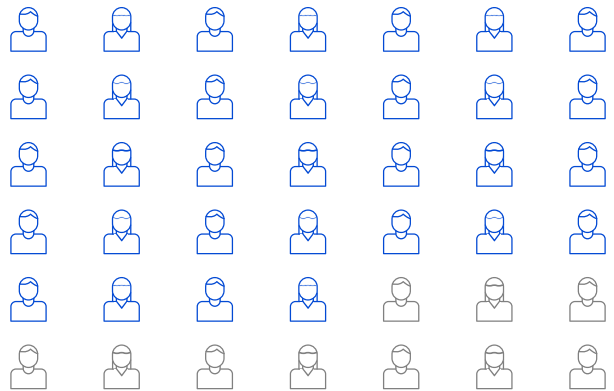
32 of 42

Fostering the learning and development of philanthropists through personal involvement and experiences, developing consciousness, and training and advice



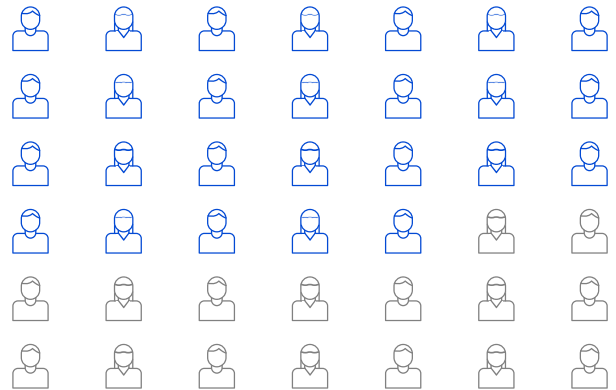
32 of 42

Promoting a culture of giving from a young age and making it socially desirable to engage in philanthropy



26 of 42

Increasing the visibility of philanthropic role models that can inspire others, yet some prefer to remain private due to modesty or safety concerns



Initiatives promoting philanthropy in Brazil

This box includes several initiatives aiming to increase philanthropic giving in Brazil such as innovative mechanisms as well as associations, pledges, and movements. They are focused on wealthy philanthropists and also on middle-class professionals and givers. A couple of initiatives that have been discontinued for various reasons are also included.

Arredondar (To round up)

Founded in 2011, Arredondar is an NGO that aims to expand the culture of donation in Brazil and strengthen the financial sustainability of certified NGOs working on a range of social and environmental challenges. Through an innovative and transparent platform, they have created a channel through which retail customers are able to round up their purchases and donate the remaining cents to their partner NGOs, thus collectively generating social and environmental impact. They have been working with a wide range of partners in the technology, legal, and physical and online retail business sectors. The success of these partnerships and of their general efforts has led to them receiving several awards, including from the Google Impact Challenge and from Fundo BIS.

www.arredondar.org.br/

Confluentes (Confluences)

Founded in 2019, Confluentes is a platform that aims to strengthen individual philanthropy in Brazil. They bring together individual donors and NGOs with demonstrated capacities and high transformation potential to pursue better results in the fight against social inequalities. Through these interactions, they not only provide their partners with strategies, support, and proven management solutions in facing social challenges, but they also strengthen the networking within the philanthropic group and towards transformational agents within Brazilian society. In their short history, they have already supported six organizations together with their institutional partners which include Instituto Betty e Jacob Laffer and Instituto Ibirapitanga.

www.confluentes.org.br/

Generation Pledge

Generation Pledge, co-founded in 2018 by a Brazilian, Marina Feffer, constitutes a community aiming to improve the quantity and quality of philanthropic donations globally. They focus on obtaining a pledge from wealthy inheritors committing to donate a part of their inheritance to effective social causes whilst also mobilizing their personal economic, social, career, and political capital to produce a larger impact. These efforts seek to promote collective efforts to 'reduce suffering and increase flourishing whilst addressing environmental social and existential risks'. So far, the group has gathered commitments pledged by 87 individuals across 25 countries representing an estimated \$1.5. billion to be donated.

www.generationpledge.org/

Movimento Bem Maior (MBM) (Greater Good Movement)

Founded in 2018, Movimento Bem Maior is a nonpartisan, nonprofit social organization that aims to strengthen the philanthropic ecosystem in Brazil. Their mission is to build bridges as they believe in a society where all are co-responsible. They invest in, support, and enable initiatives that act on the roots of Brazilian social inequality. They articulate partnerships and weave networks to promote the culture of donation and multiply the positive impact on causes in Brazil. They work by investing in ideas with high systemic impact, identifying leverage points, supporting strong leadership, centering learning and adaptation, valuing enabling contexts, dialoguing with key players, and allowing ideas to develop, spread and evolve.

www.movimentobemmaior.org.br/

Movimento por uma Cultura de Doação (MCD) (Movement for a Culture of Giving)

Movimento por uma Cultura de Doação was created in 2012 and formed by individuals and companies that organized themselves voluntarily, in an informal and organic way, to sow and germinate ideas to promote giving in Brazil. Their aim is to inspire and mobilize people and organizations to make giving part of Brazilian culture. Their five strategic guidelines are educating for a culture of giving, promoting engaging narratives, creating the conditions which are favorable to giving and the infrastructure of the sector, strengthening civil society and strengthening the ecosystem to promote a culture of giving. Dia de Doar (Donations Day) and the Fundo BIS, are examples of initiatives supported by MCD.

www.doar.org.br/

Other Initiatives that were discontinued

Instituto Azzi was founded by Marcos Flávio Azzi in 2007 with the general purpose of reducing economic inequalities in Brazil whilst improving and expanding the culture of giving through a focus on strategic results. They worked with wealthy individuals and families from identifying their motivations and goals to the selection, vetting and actual funding of well-performing organizations. They aimed to expand grantmaking practices in the country for social and environmental development. Our research found that they closed down. Similarly, Instituto Geração was founded by Daniela Nascimento Fainberg in 2007, as the first organization in Brazil to focus on privileged young individuals and encourage and assist them to rethink their role in relation to the promotion of social change. They offered these individuals spaces in which together with their peers, they could broaden their understanding of the social realities in Brazil and develop individual or collective social action initiatives. Unfortunately, Instituto Geração closed down a few years ago, though some of the individuals involved continue to offer consulting to wealthy individuals.

Pledge for Brazilian philanthropy

In 2010, Bill Gates and Warren Buffet created the Giving Pledge movement to encourage wealthy individuals or families to give at least 50% of their wealth to social causes. There is also the Pledge 1% initiative launched in 2014, which is building a movement for corporate philanthropy and asks signatories to commit 1% of equity, time, product, and profit. Only one Brazilian has joined either of these movements, businessman Elie Horn. Within this context, the Instituto para o Desenvolvimento do Investimento Social (IDIS) has been engaged in ongoing efforts to create a Brazilian pledge, at a lower percentage than 50% focusing on wealthy Brazilian individuals and families.

www.givingpledge.org/

www.pledge1percent.org/

10. Future Outlook



There is hope that philanthropy could have a more significant and sustainable impact for a fair Brazil with opportunities for all.

Practicing philanthropy for the long-term

While this report has focused on what more philanthropy in Brazil could do, it is important to reflect on the fact that there are already several philanthropists and foundations who are giving generously, who have embraced a systems change mindset, and are working to further develop the sector. In discussions with interviewees, one key point of reflection was whether Brazil would forever need philanthropy. While different opinions emerged, and some philanthropists mentioned that their

foundations' goal was to run out of business, the general view was that philanthropy would have a place in Brazilian society for a very long time. Yet, hopefully its role would not be to ensure the provision of health, education, economic opportunities, protection of the environment, or to address historic inequalities, but rather to focus on the pursuits of human ingenuity such as scientific research, the arts, or philosophy.

Reasons to believe in the future of Brazil

Generosity of certain families and individuals

Rise of the **desire** for a **more inclusive society**

Progress Brazil has made as a **democracy** and in **poverty reduction**

Professionalization of the **philanthropic sector** overall

Resilience and continuing **strengthening of civil society**

Reaction of the whole country **during the Covid-19 pandemic**

Wishing for mindset and behavior shifts

Furthermore, many of the wishes from philanthropists focused on changing the mindsets, attitudes and actions of wealthy individuals. This included increasing their giving, understanding their responsibilities and getting fully engaged, and thinking more collectively and less individualistically. On their side the professionals and experts wished that philanthropists get to experience being from a group that faces structural discrimination, increasing their focus on structural changes, and increasing the consideration for the legacy they want to leave for the country.

In terms of the themes that interviewees wished philanthropy would focus more on, the overwhelming majority mentioned more focus on climate change, followed by a greater focus on civic and citizenship education, and support for democratic institutions. Scientific research and specific segments of the population, like the elderly, were also cited. When asked what interviewees wished that philanthropy could do or could support, the majority spoke about ending inequality and racism. Some also referred to achieving gender equality and offering quality education to all children.

Imagining what Brazil could be

There were many reasons cited to believe in the future of Brazil, starting with the generosity of certain families and individuals, the rise of the desire for a more inclusive society, and the huge progress that, despite everything, Brazil has made as a democracy and in terms of reducing poverty. Interviewees placed their hope on the next generation of philanthropists and bringing new perspectives as well as the resilience and continuing strengthening of civil society. Furthermore, they also cited the professionalization of the philanthropic sector overall and the reaction of the whole

country during the Covid-19 pandemic.

When asked what could Brazil look like, with contributions from philanthropy, civil society, business, and the public sector, the picture that emerges is one of a fair and wonderful country, where every Brazilian can live out their full potential, in line with their own culture. A country with social justice and more equality, where all citizens have access to quality education, good health, good access to public services, human rights, and respect for the environment as well as opportunities for economic development.



I believe philanthropy can always be applied. I'm not sure we will get in my lifetime to a world where we don't need philanthropy. - Philanthropist

I can't imagine Brazil without philanthropy and it would take a very long time. - Philanthropist

Philanthropy always occupies a structural place in any society. I do not believe that if Brazil were a more equitable country, it could do without philanthropy. 30 years ago, people did not even talk about LGBT rights. Tomorrow we will talk about other types of rights, so there will always exist the need for philanthropy. - Professional

In traditional societies a long time ago and in more developed societies, philanthropy exists, but it's not focused on the basics of life for the population.

It's usually the arts, sciences, some level of philosophy, and funding things that are good for humanity.

- Professional

I would change the mentality of the rich people to understand their responsibilities. - Philanthropist

I would like them to know what it means to be an indigenous black woman - or any other group that faces structural discrimination. Because I think that would create a lot more empathy and understanding. - Professional

For them to embrace looking at what legacy we want to leave for this country. What are the problems, and what is the vision for the country that we wanted to build for a Brazil with resilience and what's their role as philanthropists. - Professional

The first wish is for rich people to really decide to do more philanthropy; the second for people to understand that philanthropy is not just giving money, but it's giving their talents to the communities in which they work. And third, that they understand that by getting involved in philanthropic projects they will be hooked and want to do it more. - Philanthropist

Wealthy people to think more collectively and not just individually. To have a more patriotic country, where you think about the whole and not only about yourself. - Philanthropist

I would change the mindsets of Brazilian philanthropists. I would try to make them human-centered, focused on structural changes, and patient with the process. - Professional

I would give people what was stolen from them, internally and enable them to live anywhere and be citizens with a good and dignified life. - Philanthropist





Our democracy was just tested to the limit and survived. So, it gives me hope. I'm very proud as a Brazilian that it survived. It's our very flawed democracy, but it's our democracy. - Philanthropist

I have hope for the next generation to learn more about what's going on in the world in philanthropy as well, trying to move it forward through a more modern way of doing things. From my father's generation to my children's generation, there has been a huge leap forward in terms of efficient foundations and philanthropy. - Philanthropist

I have hope when I see some of the rich families in Brazil who have a lot of money, and they are very important players, and they are doing philanthropy in Brazil. They have the key, maybe, to change the mind of someone else or to inspire others too.
- Professional

**All the things we talked about, an independent and resilient civil society, more grant giving, moving towards trust, valuing the wisdom of local communities, it is all growing and that can only be good. Yes, it is changing slowly, but it gives me hope.
- Professional**

A Brazil where people have a dignified life. Where the law works for everyone. Health works for everyone equally. And the basic human rights are the same for everyone and there's accountability.
- Philanthropist

A country that respects people, a country without poverty.
A community, and it is fabulous. - Philanthropist

**Brazil would be a fair society that is also fun and happy as we
have such diversity, we're full of music and color and culture.
- Philanthropist**

**A country where people can
live well in any part of the
country exercising their
culture and way of life.
- Professional**

A society that takes its role with empathy and respect, and that works collectively to create a fair country with ethics and identity. A Brazil that is no longer poor, and can teach other countries to do the same. This is my dream. I know that I will not see it in my life, but it doesn't matter, I work every day to build a country like that. - Professional

Then we would have a paradise on earth.
- Philanthropist

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Notes

Author

Silvia Bastante de Unverhau is a global philanthropy expert and executive with over 20 years of experience working across the business, international development, non-profit, and government sectors. She has extensive experience in grantmaking for education, health, economic opportunity, human rights, and gender equality, as well as enabling philanthropists and foundations to utilize their investments for positive impact. She is a regular writer and speaker on philanthropy and has been quoted by leading publications including the Financial Times and Forbes.

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Silvia provides philanthropy advisory and consulting

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Research

The 42 interviewees included 21 philanthropists (of which six were 'next generation'), 13 women, and eight men. Most are based in São Paulo and/or Rio de Janeiro with one in North America and two based between Europe and Brazil. There were also 21 professionals and experts interviewed, 14 women and seven men. Most are based in São Paulo and/or Rio de Janeiro, one in a different part of Brazil and two in North America. Across

42 interviewees, only three could be considered non-white from an appearance perspective. Interviews lasted between 45 and 60 minutes. 24 were conducted by teleconference and 16 were conducted in person between the 24th of August and the 1st of December 2022. This report was published in April 2023.

Endnotes

¹ World Bank, Population, total - Brazil, 2021.

² Chatham House, Democracy in Brazil, 2021

³ United Nations Development Programme (UNDP), Human Development Insights, 2021.

⁴ German Alarco Tosoni, Concentration of Wealth in Latin America in Times of Covid-19. Harvard Review of Latin America, 2022.

⁵ World Bank, Gini Index, World Bank, 2020.

⁶ World Bank, Population, total - Brazil, 2021.

⁷ Group of Institutes, Foundations and Companies (GIFE), Censo GIFE 2009-2010, 2010, p. 8.

⁸ Adjusted for inflation measured by the consumer price index (CPI) for Brazil from OECD 2023, Inflation (CPI) indicator.

⁹ Group of Institutes, Foundations and Companies (GIFE), Censo GIFE 2020, 2021, p. 29.

¹⁰ See, Paula D. Johnson et al., From Prosperity to Purpose Perspectives on Philanthropy and Social Investment among Wealthy Individuals in Latin America – Brazil Chapter, Harvard University, 2015, p.3-4, and Ana Biglione and Joana Mortari, A contemporary look into philanthropy | Regenerative Giving Practices, Philó Práticas Filantrópicas, 2022, p.5-6.

¹¹ 131 members answered the census. See Group of Institutes, Foundations and Companies (GIFE), Cens GIFE 2020, 2021, p. 9 and p.28.

¹² This report uses the higher GIFE as the basis for this estimate, as Paula D. Johnson et al., in the Global Philanthropy Report from 2018 used a smaller figure of US\$ 900 million and focused only on a subset of institutional foundations.

¹³ According to Giving USA, the Annual Report on Philanthropy for the Year 2021, reports that individuals, bequests, foundations and corporations gave an estimated 484.85 billion to US charities in 2021, as quoted by The Indiana University Lilly Family School of Philanthropy in their article.

¹⁴ The US represents about 25% of the world economy while it is one of the countries with most data on philanthropy, so three times the US figure seems reasonable. Another estimate comes from the report Funding trends 2022: Climate change mitigation philanthropy by the ClimateWorks Foundation which estimates total philanthropic giving worldwide to be US\$ 810 billion in 2021. However, the basis for this estimate is not evident. A lower estimate comes from Paula D. Johnson et al., in the Global Philanthropy Report from 2018, which claims that among the 157,064 foundations in 23 countries and Hong Kong from its cohort, annual expenditures topped US\$ 150 billion. But this is only institutional philanthropy and the study disclaimed that here are certainly a greater number of philanthropic institutions globally.

¹⁵ World Bank, GDP (in current US\$) - Brazil, World Bank, 2021.

¹⁶ Giacomo Tognini, The Countries With the Most Billionaires 2021, Forbes, 2021.

¹⁷ Total 2,755 billionaires around the world. Ibid.

¹⁸ Ana Biglione and Joana Mortari, What the pandemic told us about giving, GIFE, 2021, p.3.

¹⁹ Charities Aid Foundation (CAF), World Giving Index 2022: A global view of giving trends, March 31 2022, p. 21.

²⁰ Paula D. Johnson et al., From Prosperity to Purpose Perspectives on Philanthropy and Social Investment among Wealthy Individuals in Latin America – Brazil Chapter, Harvard University, 2015, p.6.

²¹ 70% of survey respondents in 2015 stated it is a current giving priority, see Paula D. Johnson et al., From Prosperity to Purpose Perspectives on Philanthropy and Social Investment among Wealthy Individuals in Latin America – Brazil Chapter, Harvard University, 2015, p.9.

²² Paula D. Johnson et al., From Prosperity to Purpose Perspectives on Philanthropy and Social Investment among Wealthy Individuals in Latin America – Brazil Chapter, Harvard University, 2015, p.13.

²³ Ibid., p.6.

²⁴ See the website for the Trust-based Philanthropy Project.

²⁵ See the websites of the Partnership for Economic Inclusion and of the Stanford Basic Income Lab and also consider the role that the government program Bolsa Familia had in reducing poverty in Brazil from 13% to 3% in the period from 2003 to 2015 according to a case study from 2019 from the Centre for Public Impact, a BCG Foundation.

²⁶ Paula D. Johnson et al., From Prosperity to Purpose Perspectives on Philanthropy and Social Investment among Wealthy Individuals in Latin America – Brazil Chapter, Harvard University, 2015, p.15-16.

²⁷ See Perspectives for Brazilian Philanthropy in 2022 where the Institute for Development of Social Investment (IDIS) noted that collaborative and partnership work was increasing.

²⁸ Silvia Bastante de Unverhau et al., Promoting Higher-Impact Philanthropy: What We've Learned, Co-Impact, p.7-9.

²⁹ Ana Biglione, and Joana Mortari, What the pandemic told us about giving, GIFE, 2021, p.12.

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is a fair, just, and
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where all Brazilians
can reach their full
potential.



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