

# ADVANCING EQUITY & UHNW GIVING FINAL REPORT

UNIVERSITY OF WASHINGTON STRATEGIC ANALYSIS,  
RESEARCH & TRAINING (START) CENTER

REPORT TO THE BILL & MELINDA GATES FOUNDATION

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# Executive Summary

The Philanthropic Partnerships Team at BMGF engaged the START Center to recommend definitions for three core types of equity giving: racial, gender, and SDG-aligned. BMGF also requested adaptations of these definitions for the India and China geographies, as well as for an assessment of where in the philanthropic lifecycle the proposed definitions should be used and measured against. The motivation for this project is the Foundation's strategic shift from being issue-agnostic towards being more intentionally engaged with their network of Ultra-High Net Worth (UHNW) individuals regarding giving to promote equity.

The START Center conducted a literature review of gray and white literature, as well as 12 key informant interviews in order to synthesize recommendations for each of the three objectives. We conducted additional analyses on the literature review to present takeaways beyond definitions currently in use, and combined those with our analyses of the major KII themes to arrive at our proposed definitions.

We conclude that, while it is challenging to come up with prescriptive definitions of the three core giving types, the additional context provided in the report is a useful resource for continued discussion at the Foundation about how to best define equity giving for the Foundation's purposes.

This report is a follow up to a Final Presentation given to BMGF on September 7th, 2022.

## Key Findings

- Objective 1: While we were able to find some field definitions for each core giving type, we present additional analyses to offer context for when definitions were not explicitly available, and to pull out major characteristics that could inform our final recommendations.
- Objective 2: While we do not provide explicit adaptations of the proposed definitions for each of the international geographies, we do provide country-specific context for each of the three core giving types. Our final recommendations in this objective are informed mostly by our KIIs.
- Objective 3: While we broadly recommend a centering around the end beneficiary/proximate partners, we offer dependencies on organizational approaches so as to be as context specific as possible. Our final recommendations in this objective are informed mostly by our KIIs.

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# Introduction

## Project Overview

The Bill & Melinda Gates Foundation's (BMGF) Philanthropic Partnerships Team (PPT) engaged the Strategic Analysis, Research, and Training (START) Center for the Summer 2022 quarter to support their strategic shift from being issue-agnostic towards engaging more deeply and intentionally with Ultra-High Net Worth (UHNW) individuals. Specifically, BMGF would like to understand and encourage giving that promotes equity. The overarching goal of this project is to develop recommendations that could inform BMGF's internal strategy to achieve higher levels of equity giving amongst the world's wealthiest individuals.

The challenges that this project in particular hopes to address are, firstly, the need for more durable and expansive definitions of "equity giving." Secondly, because they might not be particularly well-fitted, current definitions of equity giving can unintentionally allow gaps in data and the under or overrepresentation of progress in this sector. And lastly, there are differing opinions on where philanthropic dollars have the most impact in terms of increasing equity.

## Project Objectives

To achieve this goal, the project centered around three primary objectives:

1. to produce a set of definitions that captured the core types of equity giving: racial equity, gender equality, and Sustainable Development Goals (SDG)-aligned giving
2. to understand where there is space for global alignment within equity giving definitions, and leverage geography specific contexts, specifically for India and China, and
3. to explore where in the philanthropic lifecycle these definitions should be applied and measured against.

## Methodology

Our methods for this project included a literature review, key informant interviews, analysis and synthesis, and then a compilation of our final recommendations:

1. We conducted a literature review to identify "field" definitions that are currently in use, and also to get a sense of the different themes within the equity giving landscape.

2. We then conducted a series of key informant interviews (KIIs) to supplement the literature review. This step had a particular emphasis on investigating country-specific insights for definition adaptations and understanding equity giving within the philanthropic lifecycle.
3. We then analyze both the field definitions and the KIIs in order to summarize some key characteristics and themes.
4. Finally, we synthesized all of the information to create our final recommendations.

## Field Definitions

Since we were particularly interested in how equity giving was being defined by other philanthropic institutions, we decided to focus our literature review primarily on gray and white literature. This allowed us to develop a better understanding of the landscape of definitions among the three core types of interest: racial equity, gender equality, and SDG-aligned giving. Over the course of our review, we found that most definitions of equity and equity giving came from one of the following four types of organizations: philanthropic institutions, bilateral and multilateral organizations, consulting groups (typically groups that have been hired by philanthropic institutions), and think tanks centered around philanthropy or equity.

In the case that explicit definitions were not found, we navigated to an organization's history, mission, vision, value statements, program areas, and/or communities served. We found that these could be used as proxies for definitions and provided us with some understanding of the organization's approach to equity and equity giving.

For our analysis of the field definitions, we chose to summarize key characteristics, highlight organizations' areas of focus, and/or identify specific words or concepts that were most prevalent across all definitions. This additional layer of analysis provided some meaningful takeaways that we could incorporate into our final recommendations.

Once we felt we had reached thematic saturation, determined by the observation of repeating definitions and concepts, we shifted our focus from the literature review to KIIs, which we felt would give us better insights into objectives two and three, regarding global alignment and the philanthropic lifecycle.

## Key Informant Interviews

Before beginning our KIIs, we first identified the categories of individuals that we were most interested in hearing from and then reached out to individuals who fell within each of these categories. This approach, in contrast to interviewing individuals and then categorizing them, allowed for a more streamlined interviewing process since we could come up with a set of

preliminary questions for each category. By disaggregating the set of questions by category, we could begin analyzing data while the KIs were still in progress and could also synthesize the resulting information in a disaggregated format by category, which we felt would provide an additional layer of insight.

We identified four overarching categories, informed partially by our literature review and partially by an internal discussion regarding the most logical way to synthesize and present the resulting information (Appendix 1). We then set up 30 - 60 minute interviews with 12 individuals across all 4 categories (Appendix 2). We sent each key informant an Interview Guide ahead of time, which included both the Project Overview and Objectives, as well as a list of client-approved questions to guide the interview. All interviews were conducted over Zoom and, with explicit permission from each key informant, were recorded for internal note-keeping purposes. We assigned one START team member to lead each interview, and another to capture notes from each interview against the Interview Guide. These notes form the basis of our KI analysis. While we attempted to get explicit answers to as many of the predetermined questions as possible, we kept the interviews largely informal and exercised discretion in improvising new questions depending on the key informant's specific area of expertise.

For our analysis of the KIs, we summarized key themes that arose for each of the four categories. These themes inform our final recommendations.

## Synthesis

By supplementing the results of our literature review and KIs with further analysis of their key characteristics and themes, we synthesized final recommendations that reflect both what is in the literature as well as what is happening in the practice of equity and equity giving (Appendix 3).

When synthesizing our proposed definitions, we felt it was more appropriate to form a conglomeration of various existing definitions than to pick a single definition that was already in use as an "exemplar," since this would allow us to incorporate the most successful or important parts of different definitions, adapting the typically specific application of any particular definition into a broader context, and also to incorporate the learnings from our KI analysis into the proposed definitions.

# Results

## Field Definitions

### RACIAL EQUITY

We drew upon publicly available gray and white literature to understand how racial equity is defined across various institutions. We found that the term is communicated uniquely by each organization and is more likely to be included as an approach or within value statements rather than as an explicit definition. In our analysis, we focus specifically on the distinctions between racial *equity*, *justice*, and *healing*.

### EXAMPLES

- **Annie E. Casey Foundation (Philanthropic Institution).** “Racial equity (or racial justice) is the systematic fair treatment of all people, resulting in fair opportunities and outcomes for everyone. Racial equity is not just the absence of discrimination but also the presence of values and systems that ensure fairness and justice. Systematic equity, which affirmatively and continually supports and ensures the fair treatment of all people, is needed to supplant the system of racism” (1).
- **W.K Kellogg Foundation (Philanthropic Institution).** “Racial equity is an aspirational pursuit insisting that all people, regardless of their racial/ethnic group identification, skin color or physical traits, will have equal opportunity to experience well-being in a just society. Achieving racial equity means that an individual’s identity would not be predictive of their day-to-day experiences or their life outcomes. Racial equity is a two strand approach that focuses on systems transformation and racial healing. The social construct of race has been used to sustain a false hierarchy of human value that favors some racial groups over others (privileging “Whiteness”) and determines access to resources and opportunities” (2).
- **Aspen Institute (Philanthropic Institution).** “Racial equity refers to what a genuinely non-racist society would look like. In a racially equitable society, the distribution of society’s benefits and burdens would not be skewed by race. In other words, racial equity would be a reality in which a person is no more or less likely to experience society’s benefits or burdens just because of the color of their skin. This is in contrast to the current state of affairs in which a person of color is more likely to live in poverty, be imprisoned, drop out of high



school, be unemployed and experience poor health outcomes like diabetes, heart disease, depression and other potentially fatal diseases. Racial equity holds society to a higher standard. It demands that we pay attention not just to individual-level discrimination, but to overall social outcomes” (3).

- **Race Forward (Think Tank).** “Racial Equity is a process of eliminating racial disparities and improving outcomes for everyone. It is the intentional and continual practice of changing policies, practices and systems, and structures by prioritizing measurable change in the lives of People of Color” (4).

## KEY CHARACTERISTICS

Through our landscape analysis for racial equity, four characteristics arose:

1. Descriptions of racial equity are most likely to be included within an organization’s Diversity, Equity and Inclusion (DEI) statement.
2. When foundations explicitly defined racial *equity*, definitions were often accompanied by additional terms such as racial *justice* and/or racial *healing*, which further tailored the institution’s approach. These terms either accompany racial equity definitions or, in some cases, are used interchangeably to add an action-based approach or to center the organization’s work around specific populations:
  - a. Racial *justice* usually requires a landscape and/or strategy analysis of an organization’s approach and programs. It focuses on inclusive practices and the reinforcement of an equitable approach. It is action-based and centers around people of color (POC).

**Race Forward (Think Tank).** “Racial justice is the proactive reinforcement of policies, practices, attitudes and actions that produce equitable power, access, opportunities, treatment, impacts and outcome for all” (4).

- b. Racial *healing* is based on reflection. It focuses on reparations and the acknowledgement of a racist society. It usually takes a group approach and centers around transferring agency to POC to own their journey.

**W.K Kellogg Foundation (Philanthropic Institution).** “Racial healing is a process that restores individuals and communities to wholeness, repairs the damage caused by racism and transforms societal structures into ones that affirm the inherent value of all people. This process provides an opportunity to acknowledge and speak the truth about past wrongs created by individual

and systemic racism and addresses present day consequences for people, communities and institutions. Racial healing on internal, intragroup and intergroup levels are supported through: respectful dialogue; recognition and affirmation of people and their experiences; connectedness to one's cultural ways and practices; and the sense of agency nurtured through racial justice activism and organizing" (2).

3. Racial equity is intersectional, and the approach to it is often "hidden" within an organization's approach and strategies rather than as an explicit definition. Meaning that, while an organization that is interested in advancing racial equity might explicitly mention their focus on equity and justice, it will also strive to include racial equity implicitly in all of its practices and areas of focus and will see racial equity as an approach to all programming.
4. Finally, racial equity is mostly recognized within a US context. However, organizations that work globally still attempt to address related inequities by making investments that challenge hierarchies, structures, and policies that perpetuate disparities based on race, ethnic diversity, location (urban vs. rural), and disabilities. They take this approach with the goal of reaching a similar outcome: to provide equal opportunities and a level playing field. Additionally, within the humanitarian response and sustainable development contexts, racial equity tends to fall under the human rights umbrella.

## AREAS OF FOCUS

For those organizations that have a racial equity approach but that do not explicitly define racial equity, we assessed their approach and areas of focus instead, as proxies for how they viewed and defined racial equity. All of the specified organizations work in a global context:

- **Open Society Foundation.** Works on justice, democratic governance and human rights. Racial justice is placed at the center of initiatives to achieve lasting social and political change (5).
  - Criminal justice reform
  - Voting rights
  - Power-building
  - Economic opportunity
  - Arts, culture & narrative
- **Ford Foundation.** Empowers leaders in the areas of process. Recognizes the progress and challenges around gender, race, class, ethnicity and disability (6).
  - Immigrant rights

- Criminal justice
  - Power-building
  - Reproductive & gender justice
  - Gender-based violence
- **Skoll Foundation.** Catalyzes social change through investments in social entrepreneurship and innovation. Focuses on racial *justice* issues resulting from disenfranchisement, economic inequity, health disparities, violence and genocide, racism, colonialism, sexism and slavery (7).
    - Proximate solutions (indigenous communities)
    - Civic participation
    - Elevating voices & narratives
- **Thousand Currents.** Focuses on grassroots solutions and on partnerships with women, youth and indigenous people who are living and working closest to the inequities (8).
    - Food sovereignty
    - Economic justice
    - Criminal justice

Overall, many of these organizations are working to achieve systemic change. And while there are differences in approach (for example, the Skoll foundation focuses on social innovation while the Open Society Foundation focuses on political activism), there are important overlaps in the areas of focus. Criminal justice, civic participation/voting rights, and elevating narratives are some of the most prevalent areas of focus. There is also repeated use of the word “justice,” which reaffirms the importance of an action-based approach for reaching a more equitable balance of power. Finally, many organizations are recognizing the importance of racial equity for more than just POC. There is an acknowledgement and inclusion of immigrants and indigenous peoples as central to advancing equity.

## GENDER EQUALITY

We drew upon publicly available gray and white literature to understand how gender equity and equality is defined across various institutions. Importantly, we used this core type of giving as our vehicle to explore the distinctions between *equality* and *equity*. Since the importance of *equity* over *equality* within the racial context has been established for some time, we believe that this distinction is especially important to understand within the gender context (9). We also attempt to explore the use of “gender” for groups beyond just men and women.

- *Gender equity*
  - Accounts for differences between people and the uneven playing field
  - Process-focused
  - Ensures equal chance at both starting point and finishing line
  - Often requires built-in measures to compensate for historical and social disadvantages
- *Gender equality*
  - Different genders are not the same, but do have equal value
  - Outcome- and impact-focused
  - Measurable and equal political representation, status, rights and opportunities.
  - Recognizes that all human beings are free to develop their personal abilities, without the limitations set by stereotypes and prejudices

## EXAMPLES: EQUITY

- **CORO India (Grassroots NGO).** “To create a society based on equality and justice with no discrimination based on caste, gender, class, religion, ethnicity, sexual orientation, and age, amongst other factors” (10).
- **United Nations Population Fund (Multilateral Organization).** “Gender equity is the process of being fair to women and men. To ensure fairness, strategies and measures must often be available to compensate for women’s historical and social disadvantages that prevent women and men from otherwise operating on a level playing field. Equity leads to equality” (11).
- **The Global Fund (Multilateral Organization).** “Gender equity means fairness of treatment for women and men, according to their respective needs. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities. In the development context, a gender equity goal often requires built-in measures to compensate for the historical and social disadvantages of women” (12).
- **UNICEF (Multilateral Organization).** “The process of being fair to men and women, boys and girls, and importantly the equality of outcomes and results. Gender equity may involve the use of temporary special measures to compensate for historical or systemic bias or discrimination. It refers to differential treatment that is fair and positively addresses a bias or disadvantage that is due to gender roles or norms or differences between the sexes. Equity ensures that women and men and girls and boys have an equal chance, not only at the

starting point, but also when reaching the finishing line. It is about the fair and just treatment of both sexes that takes into account the different needs of the men and women, cultural barriers and (past) discrimination of the specific group” (13).

## EXAMPLES: EQUALITY

- **Peace Corps (Bilateral Organization):** “Gender equality means that men and women have equal power and equal opportunities for financial independence, education, and personal development” (14).
- **UNFPA China (Multilateral Organization):** “Gender equality is a human right. Women are entitled to live with dignity and with freedom from want and from fear. It is also a precondition for advancing development and reducing poverty. Empowered women contribute to the health and productivity of whole families and communities, and improve prospects for future generations” (15).
- **UNICEF (Multilateral Organization):** “The concept that women and men, girls and boys have equal conditions, treatment and opportunities for realizing their full potential, human rights and dignity, and for contributing to (and benefitting from) economic, social, cultural and political development. Gender equality is, therefore, the equal valuing by society of the similarities and the differences of men and women, and the roles they play. It is based on women and men being full partners in the home, community and society. Equality does not mean that women and men will become the same but that women’s and men’s rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men and girls and boys are taken into consideration, recognizing the diversity of different groups and that all human beings are free to develop their personal abilities and make choices without the imitations set by stereotypes and prejudices about gender roles. Gender equality is a matter of human rights and is considered a precondition for, and indicator of, sustainable people-centered development” (13).
- **Akshara Centre (Grassroots NGO):** “Gender equality is the state in which access to rights or opportunities is unaffected by gender. It’s not only women who are affected by gender inequality—all genders are impacted, including men, trans and gender-diverse people. This in turn impacts children and families, and people of all ages and backgrounds. Equality in gender does not mean that women and men will have or need the exact same resources, but that women’s, men’s, trans people’s and gender-diverse people’s rights, responsibilities and opportunities will not depend on their assigned gender at birth” (16).

- **Human Rights Careers (Independent Enterprise):** “Gender equality means that all genders are free to pursue whatever career, lifestyle choice, and abilities they want without discrimination. Their rights, opportunities, and access to society are not different based on their gender. Gender equality does not necessarily mean that everyone is treated exactly the same. Their different needs and dreams are valued equally” (17).

## KEY CHARACTERISTICS

Through our landscape analysis for gender equity and equality, four characteristics arose:

1. The majority of definitions emphasize that equitable opportunities and outcomes are a human right.
2. Definitions are often contextually and geographically dependent, and shift based on the organization’s mission and role in philanthropy. For example, in the Indian focus, there is a consistent focus on gender-based violence and the caste system; in the Chinese context, the focus is on poverty and education.
3. Many definitions target a “systems shift” in gender norms and societal expectations placed on those who identify as women. There is consensus on needing to shift norms around gender roles in society, and that an organization working to achieve gender equity will not reach desired success without first addressing root causes.
4. Definitions underscore that equity cannot be achieved in a silo and must address other underlying societal standards. Organizations working in this space have intersectional and multifaceted approaches to achieving gender equity. This also makes it hard to define and outline exactly when an organization is working on gender equity, since it permeates many fields, including education, health care accessibility, and political freedom.

We also ran a “word analysis,” to identify specific words or concepts that were most prevalent across the specified definitions. This was an exercise to emphasize the words that are recognized as important across many organizations and to inform which keywords should be considered for inclusion in our final recommendations:

1. **“Discrimination.”** Definitions often highlight the importance of addressing forms of discrimination in society that place certain individuals at a disadvantage in comparison to others, based on one’s gender identity. This word was most often used in the context of gender *equity* definitions.

- a. **JASS.** “Social and political change efforts often seek to ensure equality of opportunity without consideration of the huge power differentials and the use of privilege and discrimination in societies that put some people in a better position than others to take advantage of an opportunity” (18).
  - b. **Human Rights Careers.** “[*Equity*] addresses discrimination and imbalances in society so that *equality* can become a reality” (17).
2. **“Opportunities.”** Definitions often highlight the importance of equal access to opportunities in society across a broad range of areas, including politics and education. This word was most often used in the context of gender *equality* definitions.
  - a. **United Way.** “Gender *equality* is the state in which access to rights or opportunities is unaffected by gender” (19).
  - b. **Peace Corps.** “Gender *equality* means that men and women have equal power and equal opportunities for financial independence, education, and personal development” (14).
3. **“Rights.”** Almost every definition, for both gender *equity* and *equality*, included this word.
  - a. **Global Fund.** “Gender *equity* means fairness of treatment for women and men, according to their respective needs. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities” (12).
  - b. **UN Women.** “*Equality*...refers to the equal rights, responsibilities and opportunities of women and men and girls and boys” (20).
4. **“Dignity.”** While used less frequently than the three terms listed above, dignity emerged as one of the most common words used in the gender context. Since “dignity” is defined as “the state or quality of being worthy of honor or respect,” we felt it important to be included in any definition we recommend moving forward.
  - a. **Center for Reproductive Rights.** “...a world where every person participates with dignity as an equal member of society, regardless of gender” (21).
  - b. **UNICEF.** “The concept that women and men, girls and boys have equal conditions, treatment and opportunities for realizing their full potential, human rights and dignity, and for contributing to (and benefitting from) economic, social, cultural and political development” (13).

## AREAS OF FOCUS

Similar to our analysis of approaches and areas of focus in the racial context, we assessed some approaches and focus areas for the gender equality and equity context as well:

- **Ford Foundation.** Empowers leaders in the areas of process, and recognizes the progress and challenges around gender, race, class, ethnicity and disability (6).
  - Strengthening feminist ecosystems
  - Facilitating global coordination and investments
  - Shifting narratives and social norms
  - Expanding knowledge, evidence and practice
- **Akshara Centre (India).** Enhances societal consciousness on gender inequality through empowering women and youth (16).
  - Gender-based violence
- **Cartier Foundation.** Focuses on improving the lives of vulnerable communities in low-income countries with a focus on women and children (22).
  - Improving access to basic services
  - Women's social and economic development
  - Sustainable livelihoods and ecosystems
  - Emergency response
- **UN Women.** Focuses on promoting gender equality and empowering women worldwide while delivering green results, with an emphasis on transparency and effectiveness (20).
  - Women in leadership
  - Gender-based violence
  - Income security
  - Women benefitting equally from prevention efforts against natural disasters

Similar to the foundations we highlighted in the previous section, many of these organizations are working to create systemic change, meaning that they are attempting to address the root causes of gender inequality and gender inequity. For example, the Ford Foundation does this by addressing the need to shift social norms, and UN Women achieves a similar goal with a different approach of increasing the number of women in leadership positions. While many of these organizations seem to address equity in their focus areas, they more often used the word “equality” over “equity” in their externally facing mission statements. One key observation our team found in this analysis is that organizations’ foci shift quite significantly when moving from a local to an international context. For



example, similar to almost every Indian organization we identified, the Akshara Centre explicitly states its mission to address gender-based violence. The international organizations kept their definitions broader without diving into many specific substantive areas to remain applicable globally. Finally, we found that the definitions and foci working in this space rarely used gender inclusive terminology and rather used the binary “women and girls,” when discussing gender equity and gender equality.

## SDG-ALIGNED GIVING

We drew upon publicly available gray and white literature to understand how SDG-aligned giving is defined across various institutions. In our analysis, we focus especially on the distinction between a more traditional *engineering* approach and a more impactful *systems-change* approach to achieving the SDGs.

- *Engineering* approach (23)
  - Often “narrow, focused, precise...linear.”
  - Emphasizes the need for “implementable solutions to be controlled, quantified, and managed” so that they can produce “predictable change.”
  - Results- and solutions-oriented. Plans are designed “with fixed timeline and defined end states (outcomes).”
- *Systems-change* approach (24)
  - Equitable systems change is the “process of shifting narratives, relationships, and power in order to foster equity and self-determination.”
  - Often messy and ambiguous, as systems “may overlap” or be “nested within one another.”
  - Vision-oriented. Efforts strive to “transform the underlying power dynamics, narratives, and histories that built these structures and enable them to thrive” in the first place.

Importantly, an equity lens is essential to systems-change efforts to avoid changes “that reinstitute the status quo or replace one systemic inequity with another” (24).

## EXAMPLES

- **United Nations (Multilateral Organization).** “Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs... [It] is a process of change in which the exploitation of resources, the

direction of investments, the orientation of technological development, and institutional change are made consistent with future as well as present needs” (25).

- **UNESCO (Multilateral Organization).** “The stakes are twofold: The education of girls and women is, first, a fundamental human right and it is also an essential lever for sustainable development and peace” (26).
- **OECD (Multilateral Organization).** “With regard to the definition of alignment... sustainable development investing refers to deploying capital in ways that make a positive contribution to sustainable development, using the SDGs as a basis for measurement.’ Yet beyond creating a net positive impact over the life of the investment, our ambition should also be to aim that investment does no harm across the SDGs” (27).

## KEY CHARACTERISTICS

Through our landscape analysis for SDG-aligned giving, four characteristics arose:

1. The SDGs are all-encompassing. Finding a type of giving that doesn’t fall under one, if not multiple, of the 17 SDGs is a challenge.
2. In addition to their breadth, the SDGs are highly intersectional and interconnected. This is, of course, by design, since they were intentionally selected in recognition “that action in one area will affect outcomes in others, and that development must balance social, economic and environmental sustainability” (28).
3. SDG-aligned giving encourages a systems-change approach. Since the SDGs “can produce counterproductive or redundant efforts,” using a systems-change approach “to evolve economic and political systems into sustainable forms” can drive “substantial or complete achievement of many SDGs” (29).
4. There are preexisting targets and indicators associated with the framework. The 17 SDGs are defined in a list of 169 Targets, and progress towards these Targets is agreed to be tracked by 232 unique Indicators (30). For those interested in SDG-aligned giving, the existence of such specific and widely-accepted indicators allows for easier measurement of progress, but also for comparison against other organizations’ progress.

Similar to our “word analysis” in the gender context, we ran one for SDG-aligned giving as well, to identify specific words or concepts that were most prevalent across the specified definitions:

1. **“Education.”** Of all SDGs, SDG 4, “Quality Education,” has received the most funding from Foundations since 2016 (Appendix 4) (31). Therefore, it is no surprise that it is a big factor in definitions and discussions of sustainable development, and is seen as one of the key SDGs that will “allow many other SDGs to be achieved; with quality education, people can “break from the cycle of poverty” and education “helps to reduce inequalities and to reach gender equality” (32).
  - a. **UNESCO.** “Education is one of the key factors that influence other development outcomes.”
  - b. **UNESCO.** “The education of girls and women is, first, a fundamental human right and it is also an essential lever for sustainable development and peace.”
2. **“Equality.”** While the SDGs address many types of inequalities, there is an especially inextricable link between SDG 4 and SDG 5, “Gender Equality.” Both are highly interconnected to other SDGs, since “when we advance women, we advance equality for all” (33).
  - a. **OECD & UNDP.** “Equality: resources should be mobilized to leave no one behind and fill the SDG financing gaps.”
  - b. **UNESCO.** “Education for gender equality entails building knowledge and skills to empower disadvantaged girls or boys... Students and teachers need to reflect on existing norms and traditions and be encouraged to challenge them.”
3. **“Resources.”** The sustainable use of resources is paramount to those SDGs that are environmentally-focused. SDG 14, “Life Below Water,” calls for the conservation and sustainable use “of the oceans, seas and marine resources for sustainable development” and SDG 15, “Life On Land,” aims to “protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss” (34).
  - a. **OECD & UNDP.** “SDG alignment is both a means to mobilize resources for the implementation of the 2030 Agenda and a value proposition for private sector to preserve the long-term value of assets by doing no harm and contributing solutions to sustainable development challenges.”
  - b. **OECD & UNDP.** Sustainability: resources should accelerate progress across the SDGs.”

4. **“Systems-change.”** There have been numerous attempts to quantify the interactions between the SDGs (35,36). But the most important takeaway is that, “by recognizing the interrelatedness...there is potential for action... to develop integrated approaches to targets;” interconnectivity doesn’t just transmit risk, “it can create synergies” (36). Taking advantage of these synergies through holistic, systems-change approaches can be a far more effective path to achieving the SDGs.
  - a. **Giving Compass.** “The SDGs prompt deep thinking and action on systems change. Funders looking to create deep and lasting impact may turn to a systems-change approach. Such an approach recognizes that any given social problem is caused by a web of different factors. The 2030 Agenda takes systems-change thinking to a higher level and affirms that all the SDGs—and all the problems they address—are interrelated, even if it does not detail exactly how. Nevertheless, the SDGs prompt users to explore the connections among different issues” (37).

## AREAS OF FOCUS

For SDG-aligned giving, our assessment of the areas of focus is better illustrated by the distribution of foundation funding for each of the 17 SDGs (Appendix 4). Funding for SDG 3, “Good Health & Wellbeing,” and SDG 4, “Quality Education,” dramatically exceeds funding for any of the other SDGs.

However, because of the interrelatedness of the SDGs, it is also important to consider where the SDGs overlap and where giving for one area has immediate impacts on other areas. In the UN’s 2020 “Measuring and Monitoring Progress Towards the Sustainable Development Goals” Report, they identify “four nexus areas...where multiple SDGs converge:

- Sustainable use of natural resources
- Sustainable and smart cities
- Sustainable mobility and smart connectivity
- Measuring and monitoring progress towards the SDGs” (38).

## Key Informant Interviews

Our team conducted 12 KIIs over the course of a month. These interviews were an opportunity to include the voices of individuals that have dedicated their lives to advancing equity and challenging the status quo. While there were some differing opinions and approaches depending on individuals’ perspectives and experiences with equity giving, we summarize common themes that arose from

each of the KII buckets in this section. Additionally, most of our synthesis on the global alignment and philanthropic lifecycle objectives is informed by these KII themes, since information on these topics were challenging to find in the literature alone.

## EQUITY CHAMPIONS

The key themes from equity champions are:

- Equity is a living term that should be broad enough to include the population served, outcomes, policies, communities, processes, and structures that lead to inequalities. Equity giving should focus on root causes and barriers of success, while aiming for equal outcomes and the reduction of systemic disadvantages.
- The role of philanthropy in the Global South is to support government capacity, in order to ensure sustainable development. Cutting the ties of colonialism and dependency on the Global North is important. Equitable development will allow an equal playing field in all aspects.
- Transformation of the funding system is required to bridge the gap between UHNW individuals and communities in need. Philanthropists should look to fund as proximately and indigenously as possible, while ensuring the agency of partners and diversity in voices included. Possible actions include the co-creation of programs and initiatives as well as micro-granting, which help to shift the role of intermediaries to capacity building institutions rather than a centralized power that disburses funds.

## UHNW PHILANTHROPY

The key themes from individuals associated with UHNW philanthropists are:

- Equity is intrinsic and central to their work. It is placed as a core value and, although it may not be explicitly stated, it is recognized as highly valuable in the field. Equity is defined as creating equal opportunity for different groups of people.
- Philanthropists must center their work around community, agency and empowerment. These are all approaches recognized as equitable within a global context.
- Asia in particular is hugely diverse. There is a need to build a common lexicon, and to educate philanthropists and society around these terms. There is a focus on systems and transformational change that include the awareness of donors and recipients, and of creating sustainable systems of operations.

## EQUITY-FOCUSED PHILANTHROPIST

The key themes from individuals associated with equity-focused philanthropists are:

- System-change should be a criterion for grant-making. If programs are expected to promote equity, they should be required to create awareness of or to promote system-change. Additionally, the idea of “perfectly executable grants” needs to be actively discouraged, as aiming for perfection can detract significantly from meaningful impact. Creating systems-change is an abstract and messy process, and strict frameworks are barriers to its potential.
- Messaging and language are critical to either bringing people along or alienating them entirely. There is a need to translate any communication to everyday language that people can understand and support, ultimately leading to equitable partnerships and equitable results.
- Pooled resources and platforms for shared knowledge based on “commonalities and complementarities”. Including the space and budget for knowledge sharing between institutions is important, as grantees are often looking for any opportunity to share their challenges and successes. Everybody benefits from a more connected, equitable and visible system.

## BILL & MELINDA GATES FOUNDATION

The key themes from BMGF staff are:

- An *integration* approach: at the foundation, gender is placed at the center of all programming, i.e., gender *integration*. Primarily focused on women and girls, there is recognition and intentional programming for empowerment as empowered women have the potential to transform societies (39).
- A *transformational* approach. This is a definition applied to the Gender Integration approach. Ideally there is a shift in rules of traditionally oppressive partners, and the creation of awareness in donor communities to foster systemic change.
- Diversity, Equity and Inclusion are nascent fields. At the foundation Diversity, Equity and Inclusion are nascent fields. Specific efforts to advance equity giving include building a landscape analysis of current partners and investments, and furthering partner localization.
- Equity giving is most effective and tangible when it's focused on the end beneficiary specially if you are working with proximal partners. Other approaches for research strategies may include other pieces like the organization focus, and leadership and board diversity.

# Synthesis & Recommendations

Through our synthesis, we present first our final recommendations for each of the core types of giving, and then explain some of the overarching concepts and themes that we felt were important to incorporate into each of the definitions. We chose to synthesize new definitions, as opposed to recommending one that already exists, because we felt that the process of assessing and describing the most impactful takeaways from our literature review and KII themes would serve as a more appropriate starting point for BMGF to develop even better definitions internally. We highly recommend that this report not be seen or used prescriptively, and instead for these final recommendations to inform further discussions at the Foundation about definitions and their implications.

## Racial Equity

Considering the literature review, organization approaches, and KIIs, **we recommend the following definition of racial equity:**

Racial equity refers to an approach looking at the process or outcome resulting from the systematic fair treatment of all people. It strives for a society that ensures justice and an equal distribution of benefits, burdens and opportunities. This approach is active about acknowledging the damage caused by racism, is based on the analysis of disparities, restores individuals and community's wholeness and creates awareness at the donor, organizational and beneficiary level about the issue and the solution. The end goal is fair opportunities and outcomes for everyone.

Racial Equity has gained important momentum in the past several years and is becoming increasingly important to the philanthropic world. Many organizations are rethinking their approach, looking to include a racial equity lens. As described in the literature review section, this definition is often accompanied by other language such as *justice* or *healing*. While we recommend that racial *equity* be kept at the center of our proposed definition, it still considers the active approach that racial *justice* brings and the deep acknowledgement of a painful past that racial *healing* includes. Lastly, we emphasize that, in order to see transformational change, philanthropic institutions must increase resources for racial equity, sustain funding in order to facilitate sustainable impact, and ensure that funding is inclusive of approaches beyond equity.

However, racial equity is a journey, and we want to provide a list of characteristics and concepts to further expand the definition included above.

- Racial equity must include a recognition of the historical oppressive systems that have created unequal distributions of burdens and benefits, ensure equal opportunities for everyone, and provide a holistic perspective of race and ethnicity.

From a funder's perspective, it is critical to look at an organization's approach, values and areas of focus. Some of the key characteristics are that:

- Organizations' target populations include a focus on race (nonwhite individuals) and ethnicity; especially those who have been marginalized and are most affected by the issues. Smaller groups with less representation, like Native Americans, immigrants and refugees, need to be recognized. Those being served should be placed at the center of an organization's areas of focus and included in the conversation in order to create agency and sustainable change.
- Racial equity is central to an organization's approach and includes actions and possible approaches. It focuses on inclusive practices, reinforcement of an equitable approach and reparations.

## Gender Equity

While gender equality and gender equity are different and unique terms, we decided to highlight the importance of equity as the central definition. This came from a synthesis of our KII and literature review, in which we overwhelmingly heard and read that one cannot have gender equality without equity. One KII said that, "gender equity is at the heart of gender equality." Therefore, **we recommend the following definition of gender equity:**

Gender equity is a process that involves differential treatment to fight historically imbalanced societal norms. It recognizes that those who identify as men and those who identify as women have different needs and ensures that they are given fair and just treatment, not only in the availability of opportunities, but additionally in achieving outcomes. Gender equity cannot be achieved without a universal understanding of the way in which implicit privilege and power differentials influence both societal expectations and access to skills, education, and resources. It works towards a world in which people are free to live without fear, with dignity, and with agency to make their own decisions without discrimination.

Creating a concise definition of gender equity is challenging, as the word has enormous meaning, and tackling this area will take a dynamic and multifaceted approach. Therefore, we have listed two



key components of the definition below that we believe must be incorporated into any gender equity definition moving forward.

- A thorough understanding of the historical and contextual factors, including modern social norms, historical discrimination, and inequitable power dynamics; with consideration as to how these concepts have come to marginalize those who identify as women.
- Gender equity must actively work to build a world in which all members of society are able to live free of discrimination and fear, have equal rights, benefits, obligations, opportunities, and outcomes.

As it relates to funding and grant creation, gender equity focused work must include the following concepts and ideas:

- Invest in the priorities of women as described by the women themselves.
- Give as proximately as possible and create systems that are equipped to become financially independent and sustainable.
- Equity giving is important at all stages of the philanthropic lifecycle but must be primarily focused on proximate giving.

## SDG-Aligned Giving

Although we recognize that BMGF is an organization that is more aligned with a traditional *engineering* approach, we do not feel that this should preclude it from investing in and recognizing the power of grantees and other partners who use a *systems-change* approach to achieving the SDGs and encouraging their UHNW partners to do the same. Such an approach should be at the center of any SDG-aligned giver. Therefore, **we recommend the following definition of SDG-aligned giving:**

SDG-aligned giving requires an effort to understand as many of the intersectionalities involved in addressing a particular inequality as possible. It does this by taking a systems-change approach to fighting inequalities, and by recognizing the interconnectedness of factors beyond the immediate scope of the effort. Goals, targets, and outcomes are set in alignment with those already defined by the SDG framework (while being cautious and transparent of its limitations) and measured in ways that allow effective comparison against other groups. Lastly, it must maintain an emphasis on the long-term sustainability of any

solution and will achieve all of this by seeing external experts and proximate partners as core to the development of implementation plans.

An SDG-aligned giving approach must acknowledge the many intersectionalities at play across all SDGs and emphasize a systems-change approach and a curiosity for understanding all the factors, and how they are connected, that have given rise to inequalities.

- Additionally, it must focus on sustainability and sustainable solutions, and have goals, targets, and outcomes that are set in alignment with the SDG framework. While almost any type of giving can fall under the SDG goals, we feel that explicit alignment requires that organizations are measuring their success using the Targets and Outcomes already set by the Framework. While sticking to the predetermined indicators may in and of itself have unintended consequences, such as a limited definition of success, we feel that the benefit of more effectively being able to compare efforts across organizations outweighs the associated risks.
- The concept of “doing no harm” came up in both the literature review as well as the KIIs. When making long-term decisions regarding sustainable development, consideration must be made for the short-term impact as well, and to make sure that any action does not lead to unexpected negative outcomes. This can be best avoided by taking a systems-change approach.

## Global Alignment

### INDIA

We interviewed several KIIs with expertise in the Indian context. Among all the interviews, a few key takeaways emerged from each of the core types of giving:

#### Racial Equity:

- There was consensus that *caste* and *religious* inequities are a much more pertinent issue than *racial* inequity in India, and therefore must be incorporated into any definitions of racial equity work in India.

#### Gender Equity:

- The most commonly agreed upon focus areas were reducing gender-based violence, increasing access to education, systemically changing cultural norms around a woman's

place in society, at home, and at work, and focusing on the need for more women in leadership positions.

- Despite a unique cultural awareness of gender non-binary people, equity giving in India currently focuses primarily on women and girls' education and empowerment. There is a sense that by pursuing equity for women and girls, non-binary people will also be lifted by association, but also that until and unless women and girls can reach equal status first, other marginalized groups are simply going to be less of a priority.
- Even beyond equity, legislation in India is strong at face value but poorly implemented. Additionally, there is strong recognition that, because of the huge cultural diversity in the country, what works for one community likely won't work for another or may cause unintended consequences to other communities due to differing intersectionalities. This emphasizes the need for grassroots, proximate work which can target each community independently.

#### SDG-Aligned Giving:

- The emphases are on climate and sustainability. However, like gender, KIIIs described how, despite strong and progressive legislation, implementation of these policies has been suboptimal and often does not translate well into practice. This is likely a result of poor enforcement but also because of bureaucratic inefficiencies.

## CHINA

Before presenting our takeaways for the Chinese context, we feel it is important to note that we were only able to speak with one in-country expert and literature availability was limited; therefore, we are hesitant to draw any conclusions from this data. However, we still present the most pertinent takeaways from that interview. Overall, we learned that the government drives most of the philanthropic strategy in China and, of the three core giving types, SDG-aligned giving is of the highest priority for the Chinese government.

#### Racial Equity:

- Similar to the Indian context, racial equity is not as much of a consideration in China. However, ethnic and religious discrimination do exist (e.g., the persecution of Uyghur Muslims), but is not a focus of in-country philanthropic dollars.

### Gender Equity:

- Gender equity is a nascent giving type in China and has a lot of room for growth. There is an acute need to address gender equity in this country context, with a specific focus on challenging societal norms and family roles.
- The Chinese government “has always given priority to education” and, as a result, gender equity is achieved primarily as a byproduct of increased access to education, rural development, and poverty alleviation (40).

### SDG-Aligned Giving:

- SDG-aligned giving is popular in China and is primarily driven by government priorities. Chinese foundations and philanthropists tend to focus on a specific set of SDGs. The following SDGs have seen a steady increase in funding: SDG 1 (No Poverty), SDG 3 (Good Health and Wellbeing), SDG 4 (Quality Education) and SDG 11 (Sustainable Cities and Communities); however, the environmental SDGs (7 & 12-15) have received the least funding over the last four years, and “foundations are encouraged to forge innovating partnerships... to narrow China’s SDG gaps, especially relating to environmental protection” (41).
- Furthermore, over half of total charitable giving in China was towards government organized charities, and a larger portion of giving goes towards governmental organizations than towards civil society organizations.

## Philanthropic Lifecycle

The final piece was to understand where in the philanthropic lifecycle these definitions should be applied and measured against to maximize impact on increasing equity. Our recommendations are primarily based on our KIIIs, during which we found there was some confusion regarding exactly what the objective was. To clarify, we also presented the following question, to help conceptualize the objective to our key informants: “if someone donated money to Julliard, but the funds were to be used specifically for a scholarship for underrepresented minorities, should that be considered regular institutional giving, or equity giving?” Additionally, we also simply asked “at which level should the work of grantees be evaluated?”

Based on the responses, we recommend that, while impacting the end beneficiary should always be at the center of an organization’s approach, **the answer generally depends on which of two common organizational approaches is being used: *bottom up* or *top down*.** Those organizations

that are primarily employing *bottom-up* approaches: grassroots organizations, community-based work or impact-driven philanthropy, should focus on proximate partners. We emphasize that “proximate partner” does not have an agreed upon definition and should be specific to the context. Such organizations should look for proximity to the problem, staff composition and experience, as well as a community-centered approach when determining which groups to partner with in their effort to increase equity.

On the other hand, institutions using a *top-down* approach, such as government organizations, multilateral organizations and philanthropic institutions, should focus more on the other end of the spectrum, leadership composition and the organization approach. Contracts and grants should be awarded to organizations that have strong capacity and highly-functioning systems in place to ensure equitable distribution of the funds for equity.

The final recommendation we make with regard to the philanthropic lifecycle is to change language from “beneficiary” to “partner” or “grantee.” Many key informants, especially the ones using a *bottom-up* approach, emphasized the need for this change even without being prompted and explained that the word ‘beneficiary’ automatically introduces a power dynamic that might alter grantees and proximate partners view themselves and interact with philanthropists. By altering the language, philanthropists can position themselves as thought partners and can begin exploring an approach of co-creation with their grantees and allowing for more inclusion of those who are being served, encouraging them to be agents of their own change.

## Conclusion

In summary, the discussion around equity-giving definitions is an interesting and complicated one. There is no single definition that can capture all aspects of the discussion and still be effective. While “field definitions” of each core type of giving exist, we found it a more useful exercise to dive into what other additional factors surround that particular organizations’ definition, such as areas of focus and key characteristics. Our key informant interviews provided a lot of context to our literature review by bringing to light how equity giving actually happens in practice, and how it can be better. The interviews gave us a lot of information for the US and India geographies specifically. In the US, racial equity is the primary focus; in India, gender equity takes center stage; and in China, the emphasis on SDG-aligned giving is driven primarily by the government’s priorities.

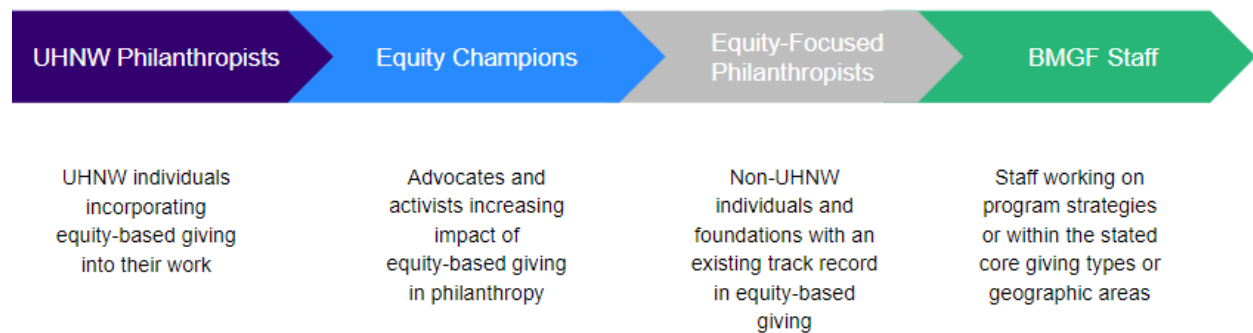
We found that “equity” is a far more inclusive word than equality, although the two are closely tied, and also that a systems-change approach to SDG-aligned giving would lead to the most effective results. We found that “gender” is still almost exclusively used in reference to “women and girls,”

especially in international settings, and that many see the fight for women's rights and equality as an important precursor to the fight for other genders' rights. While we broadly recommend a centering of the end beneficiary in equity work, the assessment of where in the philanthropic lifecycle these definitions should be applied should consider organizational approach. Different organizational approaches impact equity giving differently and being flexible in this aspect allows philanthropists to play to each approach's strengths and weaknesses in a way that increases effectiveness and impact. We also recommend a language shift away from "beneficiary."

Finally, we recommend that the definitions proposed in this report not be seen as prescriptive, and instead that the context and additional information presented in the report be used to inform further discussion at the Foundation regarding how best to define equity giving, depending on the partners and grantees with which equity work is being accomplished.

# Appendix

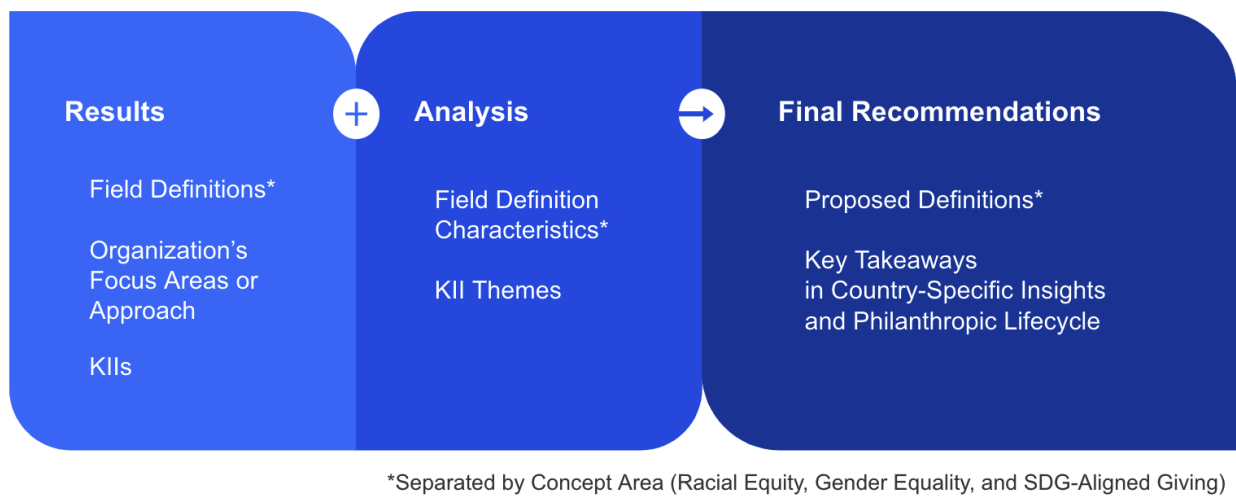
**Appendix 1.** Figure illustrating the four key informant categories and their descriptions.



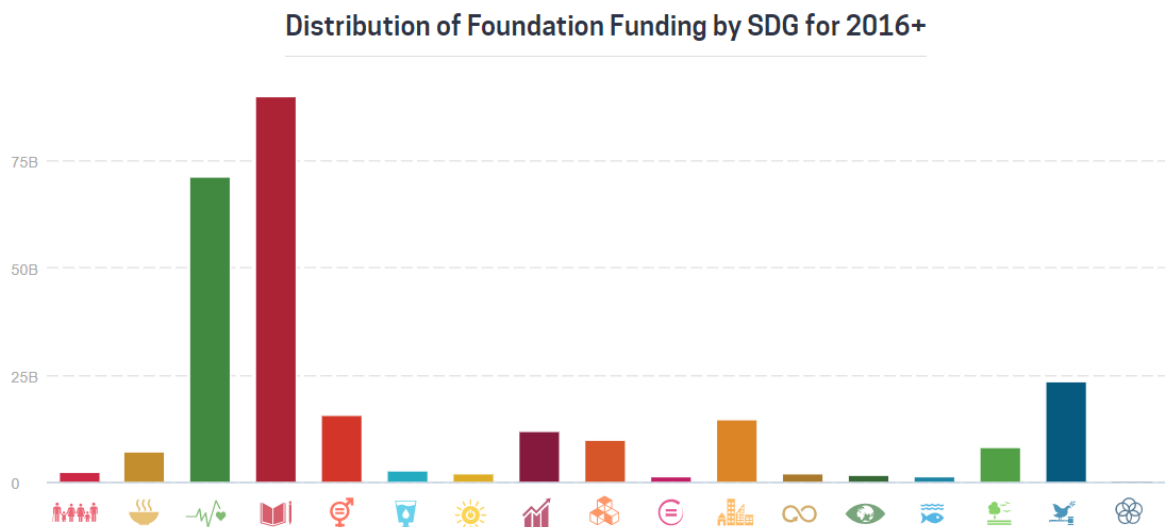
**Appendix 2.** Table specifying each of the twelve key informant's category, organization, and title.

CATEGORY	ORGANIZATION	TITLE
UHNW Philanthropist	Rockefeller Foundation	VP Asia Region Office
UHNW Philanthropist	Nilekani Philanthropies	Director of Strategy
Equity Champion	Adeso	Executive Director
Equity Champion	Indiana University	Associate Dean, Research and International Programs
Equity Champion	Breakthrough	President & CEO
Equity Champion	Giving Tuesday	Chief Data Officer
Equity-Focused Philanthropist	Raikes Foundation	Impact-Driven philanthropy director
Equity-Focused Philanthropist	EdelGive Foundation	CEO
BMGF Staff	BMGF	Gender Integration PO
BMGF Staff	BMGF	DEI Center of Excellence SPM
BMGF Staff	BMGF	Philanthropic Partnerships SPO
BMGF Staff	BMGF	Philanthropic Partnerships PO

**Appendix 3.** Schematic illustrating data synthesis approach.



**Appendix 4.** Graph illustrating the distribution of funding from philanthropic foundations by SDG.





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