

We need to help

Thoughtful philanthropy in response to
humanitarian crises



A humanitarian crisis (also called humanitarian disaster or humanitarian emergency) is defined as a singular event or a series of events that are threatening in terms of health, safety or well-being of a community or large group of people.

"What Is a Humanitarian Crisis" Archived 16 September 2013 at the Wayback Machine, Humanitarian Coalition, Retrieved on 6 May 2013.

Source: <https://www.humanitariancoalition.ca/what-is-a-humanitarian-emergency>

Disease outbreaks. Wars. Climate-related disasters. Food insecurity. We're seeing humanitarian crises, from emergencies to ongoing crises, occur with increasing regularity across the globe. It can leave one feeling utterly helpless.

Humanitarian crises drive people into poverty, disrupt their social support networks and erode their ability to improve their well-being. Poverty, in turn, undermines resilience to shocks. Children – especially girls – miss out on education. Women's rights are threatened. Economic hits at individual, regional and national levels diminish stability. Decades of development are put at risk. The cost of inaction is high.

But it's during the worst of times that we see the best in people, wanting to help however they can. Distance, limited know-how, the need to respond quickly and the sheer number of organizations can make giving decisions overwhelming. Reacting too fast and without the right insight can lead to ineffective giving or – even worse – harm.

By being well informed, donors can fund the right organizations for the greatest impact. And they can make sure their giving helps both during a disaster as well as on the long road to recovery and in preparation for the next crisis.

Our team of Philanthropy Advisors and UBS Optimus Foundation Program Directors, with over two decades of expertise, offer here the most important guidance for impactful giving during humanitarian crises.

At a glance

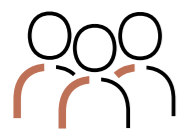


The number of countries experiencing protracted crisis has doubled to 34 in the last six years^I

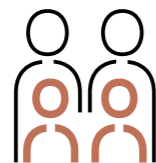


The ten most underfunded emergency situations in 2021 received

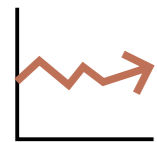
less than half the funding required to meet humanitarian needs.^{II}



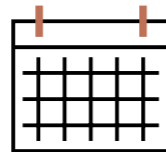
274 million
Estimated people needing humanitarian assistance in 2022^{III}



More than 1 percent of the world's population is now displaced,
about **42 percent** of whom are children.^{III}



The volume of international humanitarian assistance from the largest 20 public donors in 2020 flatlined at **USD 23.1 billion**^I



Over a third of private giving is done in less than the first four weeks of a sudden disaster, **two-thirds** within two months.

Giving stops almost completely after five or six months.^{IV}



In 2019, international humanitarian assistance from private donors grew to **USD 6.8 billion**, 74% of which was from individuals.^I

85% of funding for NGOs comes from private donors^I

^I Development Initiatives. (2021). Global Humanitarian Assistance Report 2021. <https://devinit.org/resources/global-humanitarian-assistance-report-2021/>

^{II} United Nations High Commissioner for Refugees (UNHCR). (2021). UNHCR's Most Underfunded Situations in 2021. <https://www.unhcr.org/news/stories/2021/9/614464ee4/covid-19-tops-list-unhcrs-underfunded-crisis-2021.html>

^{III} United Nations Office for the Coordination of Humanitarian Affairs (OCHA). (Accessed March 21, 2022). Global Humanitarian Overview 2022. <https://gho.unocha.org/intro/glance>

^{IV} William M. Paton (2022), Measuring the State of Disaster Philanthropy Report, Candid & Center for Disaster Philanthropy <https://disasterphilanthropy.candid.org/>

More people than ever need humanitarian assistance. Philanthropy can play a critical role.

Needed more than ever

In 2022, an estimated 274 million people will need humanitarian assistance and protection. This is up from the 235 million people the year prior. The United Nations and partner organizations aim to assist those most in need: 183 million people across 63 countries. But that alone will require USD 41 billion, about a third more than was spent in 2021.^I

Most aid for humanitarian crises comes from government donors. But this aid has flatlined in recent years despite an increase in demand for this kind of aid. Private giving – especially from individuals – is on the rise.

A special role for philanthropists like you!

As a private philanthropist, you have an opportunity to increase funding going to humanitarian crisis. But you also have an opportunity to increase the impact of crisis funding:

Leverage your existing partnerships

First, by making crisis giving an extension of regular giving, you can work with existing partners in your areas of expertise

during times of crisis. Crisis intervention then becomes a part of normal philanthropy rather than a one-off event. Part of this ongoing commitment to crisis philanthropy can include a focus on funding preparedness and recovery – not just immediate crisis response.

Be bold

Second, philanthropists have the power to take risks on new innovations and provide flexible funding than public funders. By finding solutions that work and committing to scale, you can help fund local programs that are ready to succeed once crises hit (or, better yet, prevent disaster from every striking).

Team up

Third, successful philanthropists know that coordination and collaboration increase efficiency and impact. By working collectively with one another, you can reduce duplication of effort and increase the efficiency of the response.



^I See Dalberg Global Development Advisors. (2017). Roles for Philanthropy in the Humanitarian Sector. Conrad N. Hilton Foundation. <https://www.hiltonfoundation.org/learning/roles-for-philanthropy-in-the-humanitarian-sector>

How should you give during a crisis? Here are our top tips.

01

Keep calm and think

There's nothing wrong by being motivated to give out of empathy and compassion. But don't stop there. Your heart can't answer the key questions to make sure your donations have the intended impact. A good dose of critical analysis can make sure you can follow your heart smartly. And don't hesitate to seek advice. Whether it's your philanthropy advisor, peers or other experts, your network will help you make decisions that are good for you and for the recipients of aid.

02

Build on your expertise

Not sure where to give? Think about your focus in your more routine philanthropy. People in emergencies have a wide range of needs – food, shelter, healthcare (including mental health), access to education, resettlement services – many of which will exist beyond the acute phase of the crisis. The closer you can align these needs to your routine giving, the easier it will be to identify the right partners and ensure that your giving will have both an immediate and longer-term impact.

03

Do your usual due diligence

You want to act urgently, but that shouldn't entail abandoning all precautions. Donating within the context of a crisis may require more flexibility and trust than usual with your implementing partners. But there are some key questions you should be asking:

- Does the partner have local knowledge and a network in the crisis area?
- Does the partner have adequate safeguarding in place? Have there been any negative incidents in the past and were they successfully resolved?
- Is the partner's proposed emergency response in their area of expertise?
- Is this an established organization or were they created in the wake of a disaster? If the latter, what can you find out about their structure, their team and their other partners?

Sadly, there can be scams during crisis relief. Be sure to check in with your usual network of advisors.



Donate to those who can act fast and have a proven track record

Find trusted crisis partners with proven track records in their respective fields. Take a needs-based approach, listening carefully to those most affected and the most vulnerable. Prioritize existing development partners working in local communities who can ensure solutions are relevant to the crisis and responsive to the needs of the community. Choose partners who can quickly adapt as needs change and who have experience tracking impact in a crisis situation. And make sure they monitor their performance to guarantee they're delivering real impact for the people affected.

The most efficient organizations have their emergency response and funds working in the field in a matter of hours and days. Work with trusted partners that have demonstrated the ability to deploy rapidly and work with local communities to mitigate the impact of a crisis.

Rapid response requires relationships
When the Ebola crisis struck Liberia in 2014, our existing relationships with Last Mile Health (LMH) and Médecins Sans Frontières (MSF) meant we could expand our funding rapidly as the outbreak grew. We were among the first global funders to directly fund Ebola treatment and prevention efforts as part of a comprehensive medical response. In the areas where we funded Ebola-related interventions, the outbreak was contained and provided hope to other areas that the outbreak could be halted. In addition, overall medical support was provided to ensure that other diseases were treated and essential care provided. Liberia was the first country to be declared Ebola-free. Both MSF's and LMH's responses to the crisis and their highly effective models have been recognized by the international community and the Liberian Government.

“We are tremendously grateful to UBS Optimus Foundation for being the first to provide us Ebola-related funding in early 2014. Thanks to them we were able to contain Ebola and save lives in the communities in which we work.”

Raj Panjabi, U.S. Global Malaria Coordinator and Co-Founder of Last Mile Health

Adapt to make giving unrestricted

Be open to giving unrestricted grants so that organizations can adapt to the situation on the ground as it evolves. By letting your grantees get on with what they do best, they are able to maintain momentum and work more smoothly. Focus on defining common goals together – like the number of refugees placed in new accommodation or number of orphans rescued – and let grantees be creative and flexible about how they achieve them.



“Cash means the people we serve can make their own decisions. When we give blankets or plastic sheeting, what we have often seen over the years is that people just sell them to get cash. There is also a virtuous cycle of investment in local economies when we give our clients cash. When they spend cash on items they need, they give vendors on the ground the opportunity to make money, and to pay their staff.”

Bob Kitchen, Vice President for Emergencies, International Rescue Committee

Give cash

Donating cash – rather than supplies – is often recommended by crisis experts. Cash can be on the ground quickly, allowing frontline partners to direct funds where they're needed most.

Cash is king
Research by the Harvard Humanitarian Initiative, an interdisciplinary center at Harvard University dedicated to relieving human suffering in wartime and disasters, shows that donations of items like food, clothing and toiletries are often the last thing that is needed in crisis areas. In fact, these donations can often interfere with important crisis response efforts by diverting energy toward collecting, sorting, warehousing and distribution (not to mention the delivery challenges in areas with damaged infrastructure). Consensus on best practices is converging on sending money. Those on the ground (and individuals themselves) can buy what's needed. Refugees, in particular, ought to be afforded the dignity and autonomy of determining what they need.²



Watch a video
“Why Cash is Best for Disaster Relief” >



Source: USAID Centre for International Disaster Information, (2018) Smart Compassion series “Why Cash is Best for Disaster Relief”

² Julia Brooks. (2017). “Want to help after a disaster? Give your cash, not your clothing.” Guardian. <https://www.theguardian.com/society/2017/sep/25/disaster-aid-cash-not-clothing-relief-hurricane-harvey>

Current giving along the crisis lifecycle



Source: Center for Disaster Philanthropy and Candid. (2021). Measuring the State of Disaster Philanthropy 2021: Data to Drive Decisions. <https://disasterphilanthropy.candid.org/>

07

Take the long view

The feeling of wanting to act urgently is totally normal. But needs change over time as crisis becomes recovery. When TV cameras move on, it's vital to keep helping affected communities build for a healthy and productive future. Choose partners who look to build local expertise and resilience in-country and consider splitting your donations into strategic milestones in the short, medium and long term. And don't forget about preparedness and mitigation.

There are five major stages on the continuum of crisis assistance (though the lines between them are blurred). What's ultimately important is to stay flexible and responsive to needs on the ground.

1. Response and relief
Immediate responses, particularly for basic human services.
2. Reconstruction and recovery
Restoring infrastructure and systems, as well as supporting the recovery of individuals and families after experiencing crisis, including integration of refugees into host countries.
3. Resilience, risk reduction and mitigation
Preparing for future crises by strengthening systems, responses and people.

4. Preparedness
Training and activities for frontline workers, city planners and community members on responses to specific disasters.
5. Research and convening
Tracking data on what works and sharing lessons learned.

Rebuilding even better

Working with established partners well into recovery can sometimes lead to an even better future. After the 2015 earthquakes in Nepal, we continued to work with partners in the years after to rebuild: In our first phase of emergency response, we supported partners like Save the Children, One Heart Worldwide and We Care Solar to provide immediate support with essential services. But after the initial crisis, our partners Possible Health, One Heart Worldwide and We Care Solar continued to build up quality healthcare for rural Nepali communities. And partners Room to Read and Save the Children advanced programs providing quality education spaces, early childhood services and healthy parenting for children. Their successes illustrate how crisis response doesn't need to hamper long-term development efforts when recovery is prioritized as part of the response plan.

08

Collaborate with other philanthropists

Working together to drive impact can be an extremely powerful way to give more strategically and reinforce each other's efforts.

Collective philanthropy – collaborating with other like-minded donors – is an effective way to maximize your impact. That might mean leveraging your collective expertise towards a particular focus. Or it might mean joining forces for matching campaigns like our own UBS Ukraine Relief Fund.

Partnering to make donations go further

Following the overwhelming response from our employees and clients, we partnered with XTX Markets to significantly extend our matching donation program for Ukraine humanitarian relief. The generous matching pledge of up to GBP 10 million, together with our own new additional pledge of GBP 5 million, means that almost USD 20 million additional in donations from clients and employees to the UBS Ukraine Relief Fund will be matched 100 percent. In combination with our original USD 5 million matching program, together, we'll create a total financial impact of nearly USD 50 million.



09

Ask for transparency, but be considerate

In everyday philanthropy, you know where the money goes and its cost-effectiveness (thanks to framework agreements). Well-run organizations have predefined support areas and budgets. They can track funds to specific projects and can conduct a financial audit on all your funding. As a donor, you should support effective organizations run by professionals and understand how much of your money is reaching affected populations.

But, be considerate. Donors often ask for reports: you might want to ask the organization to send you one that they already have at hand, rather than burdening them with a tailored one.



Be prepared

Preparedness for crises as part of your overall philanthropy planning

Ask the right questions

Crisis philanthropy is much like everyday philanthropy: you need a plan. And you don't need to wait until events happen to have your plan in place. In fact, the best way to make sure you maximize your impact in crises is to develop your strategy well in advance. These questions can help you build an effective crisis response plan:

Planning

- Which kinds of crises already match your current focus?
- What types of crises and in what geography or communities would you support?
- Who would take the lead in your family, company or foundation in triggering and implementing crisis giving?
- What other roles need to be filled and do you have the right team in-house to take on these roles?

Implementing

- How will you decide who will receive your donations on the ground?
- What sources of information and advice will you use?
- In a crisis, will you act immediately in the acute response and relief phase? Or do you prefer to look at giving during the recovery and reconstruction phase? Or both?
- Is there an opportunity to support preparedness and mitigation?
- Do you already have existing trusted partners with local knowledge you could mobilize?
- If you need to create a short list of organizations that fit with your everyday philanthropy, what are your evidence markers for evaluating potential performance?
- Do your current grantmaking processes allow you to act swiftly? What might need to be updated to do so?
- Are you interested in providing unrestricted multi-year and backbone funding for partners to navigate emerging challenges and challenges?

Engaging with others

- Is there a way to make your donation go further?
- Who could you pool funds with to avoid duplication and poor prioritizing?
- Can you offer anything other than cash? Do you have experience or a network that would be beneficial to your implementing partners?
- If you are close to the crisis, what local partners will you collaborate with?

10

Reflect and prepare for next time

In the aftermath of a crisis giving, take the time to reflect on how you can learn and improve on your philanthropy for future crises. Giving during milestones in history and making a difference can often breathe new life into your overall giving strategy. Many philanthropists pose new questions or revisit old ones. Did the crisis change the way you think about giving in general? What would you do differently next time? Is your time, network and funds still aligned with your priority causes or have these now changed? How can you be better prepared for the next crisis?

Teachers as health workers

In 2020, UBS Optimus Foundation launched the COVID-19 Relief Grant Prize for evidence-based interventions that increase the resiliency of children, youth and communities affected by COVID-19. The Foundation awarded Healthy Learners nearly USD 1 million to scale its approach. Healthy Learners trains teachers to become school health workers, offering timely diagnosis and treatment for school-aged children to reduce sickness and absenteeism. With help from the COVID-19 Relief Grant Prize, Healthy Learners scaled its model quickly to all 105 public primary schools in Zambia's capital city of Lusaka, which serve 250,000 children. Thanks to this approach, Zambia was one of the first countries on the continent to reopen schools.

The program has sustained performance: the number of children utilizing school health services has remained high and support for biannual deworming and vitamin A supplementation – interventions which have well-proven benefits on health and educational achievement in children – has continued. Healthy Learners is now working with the Zambian government to scale the program nationally.

Think strategically about crisis response, long before it is needed.



Nalini Tarakeshwar
Head of Programs and
Monitoring & Evaluation,
UBS Optimus Foundation

As an international grant-making foundation, what is your strategy when it comes to responding to humanitarian crises?

Ultimately, we want to see children and their families recover more quickly from disasters and build resilience to cope with future shocks. We aim to act swiftly and mobilize funding from our clients to support immediate relief as well as longer-term recovery and resilience.

We work with trusted partners that have an on-the-ground presence where the crisis occurs. We prioritize those partners with a strong track record of responding to emergencies and supporting local organizations. We also aim to provide flexible funding and remain as responsive as possible to on-the-ground needs.

As budgets allow, we also aim to provide unrestricted support to emergency relief-focused NGOs so that we contribute to strengthening the humanitarian ecosystem; support the development of monitoring, evaluation and learning (MEL) capacities and evidence-based decision making of implementing partners; and support forgotten crises that receive little media attention.

What are the UBS Optimus Foundation's areas of focus when granting emergency relief?

We align our emergency response focus to our routine programming core focus areas: health, education, child protection and climate action. This enables us to grant to our existing, trusted partners. It also helps ensure that we can both respond to the immediate crisis as well as the longer-term recovery and transition (back to) development. We are particularly focused on systems that affect children and families – like health, education and social protection – that can help in recovery and resilience.

How do you answer the sheer number of solicitations to the Foundation for funds in emergencies?

It's challenging! Having a clear strategic framework and areas of focus help us to rapidly evaluate which solicitations are worth pursuing further and which are not.

How do you proactively prepare your grant portfolio for your emergency relief response?

Our grant portfolios are largely focused on strengthening local systems (health, education, child protection and climate action) precisely so that they are more effective every day and more resilient in the face of shocks. In working to strengthen systems today, our partners are developing strong, productive relationships with key government and NGO stakeholders and building deep knowledge of the local context that positions them to mount a swift response to any crisis.

What are the best ways to evaluate your emergency investments so that you can learn for future responses?

It can be difficult to rigorously evaluate emergency response programs given the urgency of the situation and the often-challenging contexts in which the programs are being implemented, but some organizations have done it successfully. So, we look to partner with these organizations so that they can replicate these proven models in additional contexts. We also look for organizations that have evidence-based programs with potential to be implemented in a humanitarian context. We regularly review progress made by our grantees and examine the portfolio as a whole to understand where there may be gaps in our response to fill in the near term and/or to inform our emergency grantmaking approach in the future. We also consult and collaborate with other funders so we don't duplicate efforts and have the opportunity to learn from them.

What are the most effective ways to for grantees to engage donors in emergencies?

Donors are eager to hear about what is happening on the ground from those who are there. Sharing frequent updates from the frontlines and creating opportunities for donors to learn directly from staff in the field through webinars or other events can be very effective in engaging donors. Donors also are eager to hear about how their funding is helping people, so reporting regularly on key performance metrics – like number of people reached with survival supplies or cash assistance – and challenges faced by our partners can be very effective for engagement.



Read our "Monitoring, Evaluation and Learning" white paper >





Whatever your passions and philanthropic goals may be, we can help you understand how and where your resources can be the most effective, giving you more confidence in your giving and making the philanthropic journey even more rewarding for you and your family.

To find out more about...



...what we do as a firm:
ubs.com/insociety



...how we can support you with
your philanthropy:
ubs.com/philanthropy

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