



FUNDERS' BRIEFING: Global Resource Flows Webinar

20 February 2014

Logistics

- + Please help us by muting your own phones (*6)
- + There will be a Q&A after the presentations. If you have a question in the interim, please:
 - + Type it in the **chat feature** at the right-hand side of your screen
 - + **Tweet** them to @FCAA
 - + **Email** them to sarah@fcaids.org
- + The webinar will be recorded and available on www.fcaids.org

Agenda

- + **Welcome & Logistics**
Sarah Hamilton, FCAA
- + **U.S. Global Funding for HIV/AIDS**
Jen Kates, Kaiser Family Foundation
- + **Global Fund Update**
Deborah Derrick, Friends of the Global Fight Against AIDS, Tuberculosis and Malaria
- + **Global Philanthropic Resource Tracking**
Erika Baehr, FCAA
- + **Moderated Q&A**
Erin Hohlfelder, One Campaign



U.S. Global Funding for HIV/AIDS

Funders Concerned About AIDS
AIDS Philanthropy Summit

Jen Kates, PhD

Vice President; Director, Global Health & HIV Policy

Kaiser Family Foundation

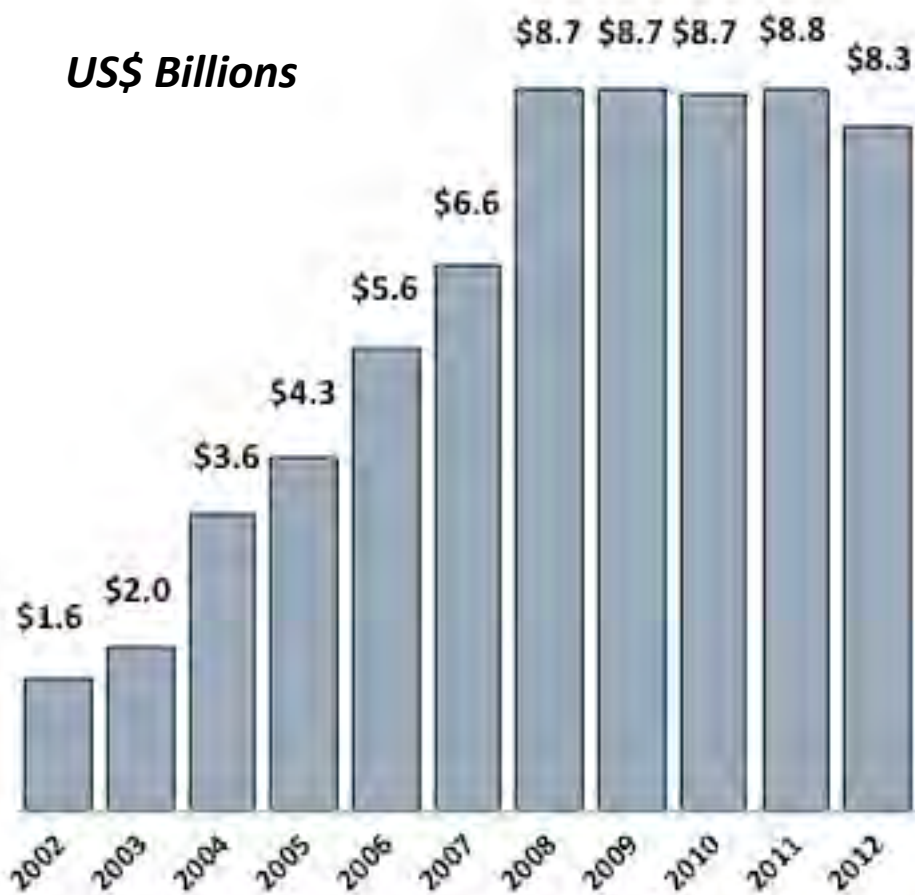
jkates@kff.org

<http://globalhealth.kff.org>

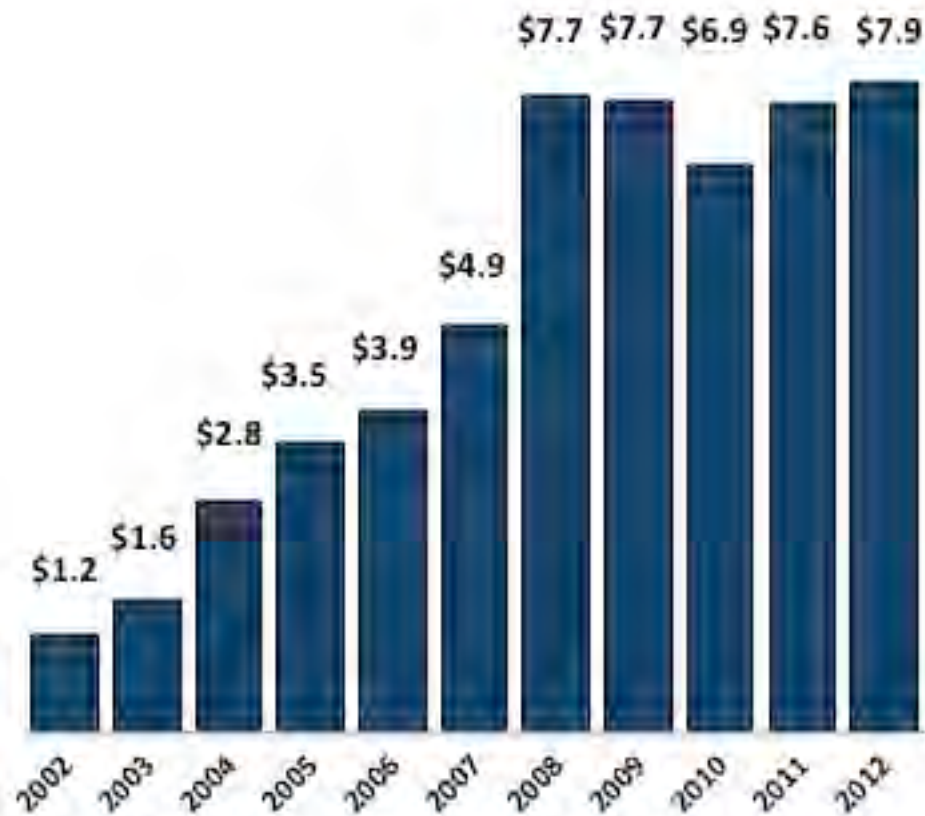
Current Landscape: USG in the Context of Donor Government Funding for HIV/AIDS

International HIV Assistance from Donor Governments: Commitments & Disbursements, 2002-2012

US\$ Billions



**Commitments
(Enacted Amounts)**

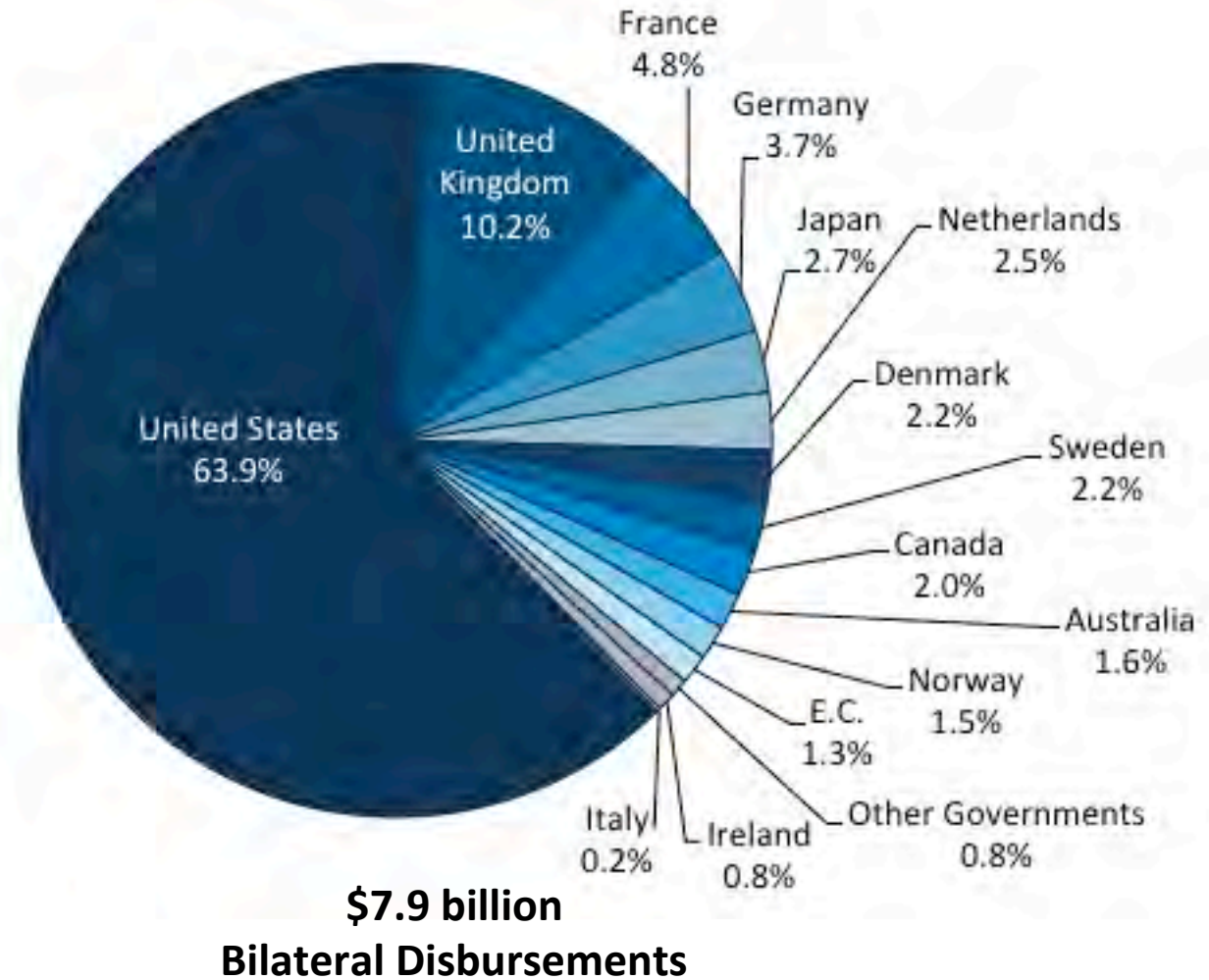


Disbursements

SOURCES: UNAIDS and Kaiser Family Foundation analyses; Global Fund to Fight AIDS, Tuberculosis and Malaria online data queries; UNITAID Annual Reports; OECD CRS online data queries.

Donor Governments as a Share of Total Donor Government Disbursements for HIV, 2012

In Millions



SOURCES: UNAIDS and Kaiser Family Foundation analysis, September 2013; Global Fund to Fight AIDS, Tuberculosis and Malaria online data query, January 2013; UNITAID Annual Report, 2012; OECD CRS online data queries.

U.S. Government Share of Global Resources Available for HIV, 2012

In Millions



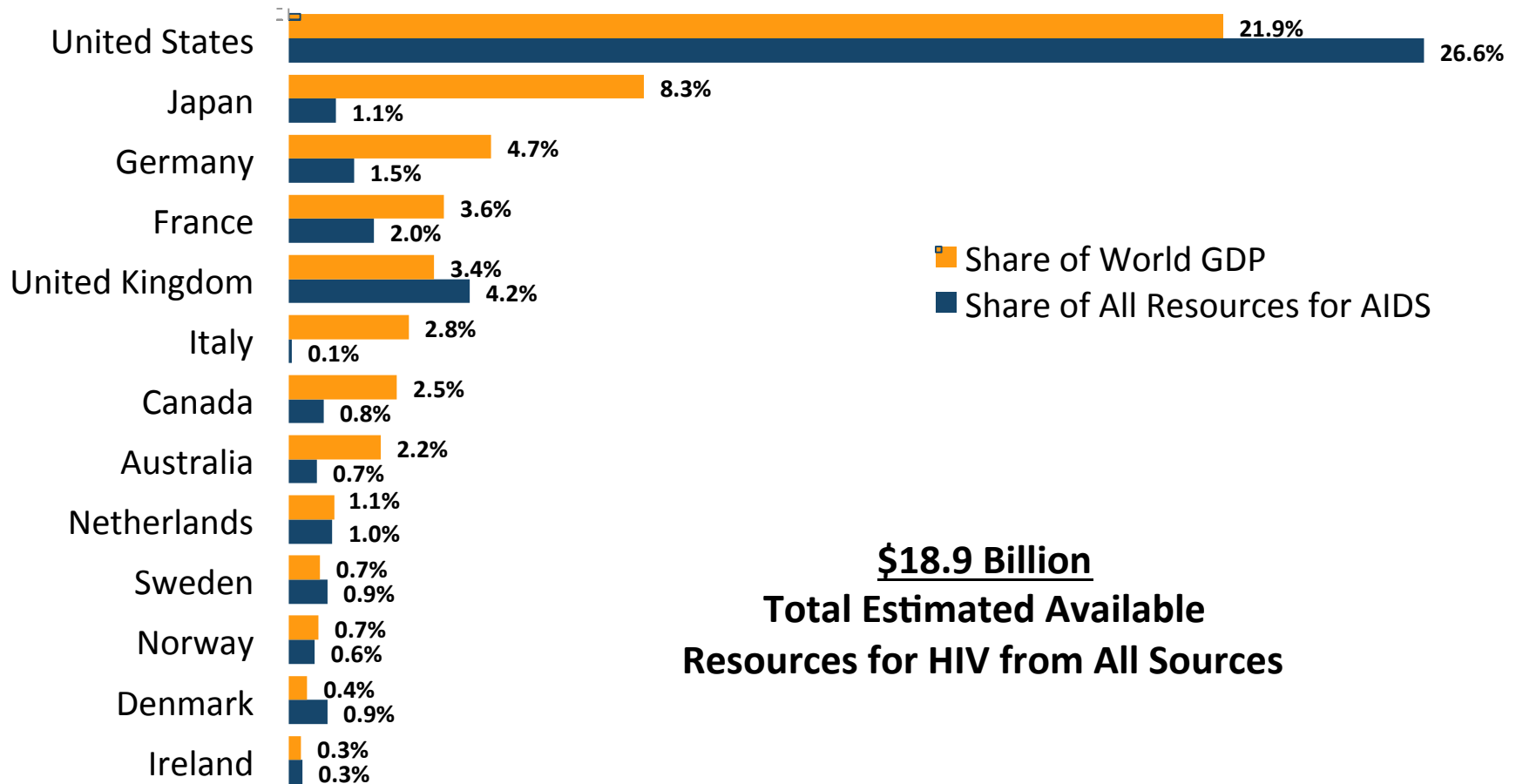
\$18.9 billion

Total Resources for HIV from all Sources

NOTES: Total available resources for HIV from all sources includes domestic public and private spending, donor government bilateral assistance, multilateral organizations and private philanthropic aid disbursements.

SOURCES: UNAIDS and Kaiser Family Foundation analysis, September 2013; Global Fund to Fight AIDS, Tuberculosis and Malaria online data query, January 2013; UNITAID Annual Report, 2012; OECD CRS online data queries.

Assessing Fair Share 1: Donor Government Share of World GDP* Compared to Share of All Resources Available for HIV, 2012



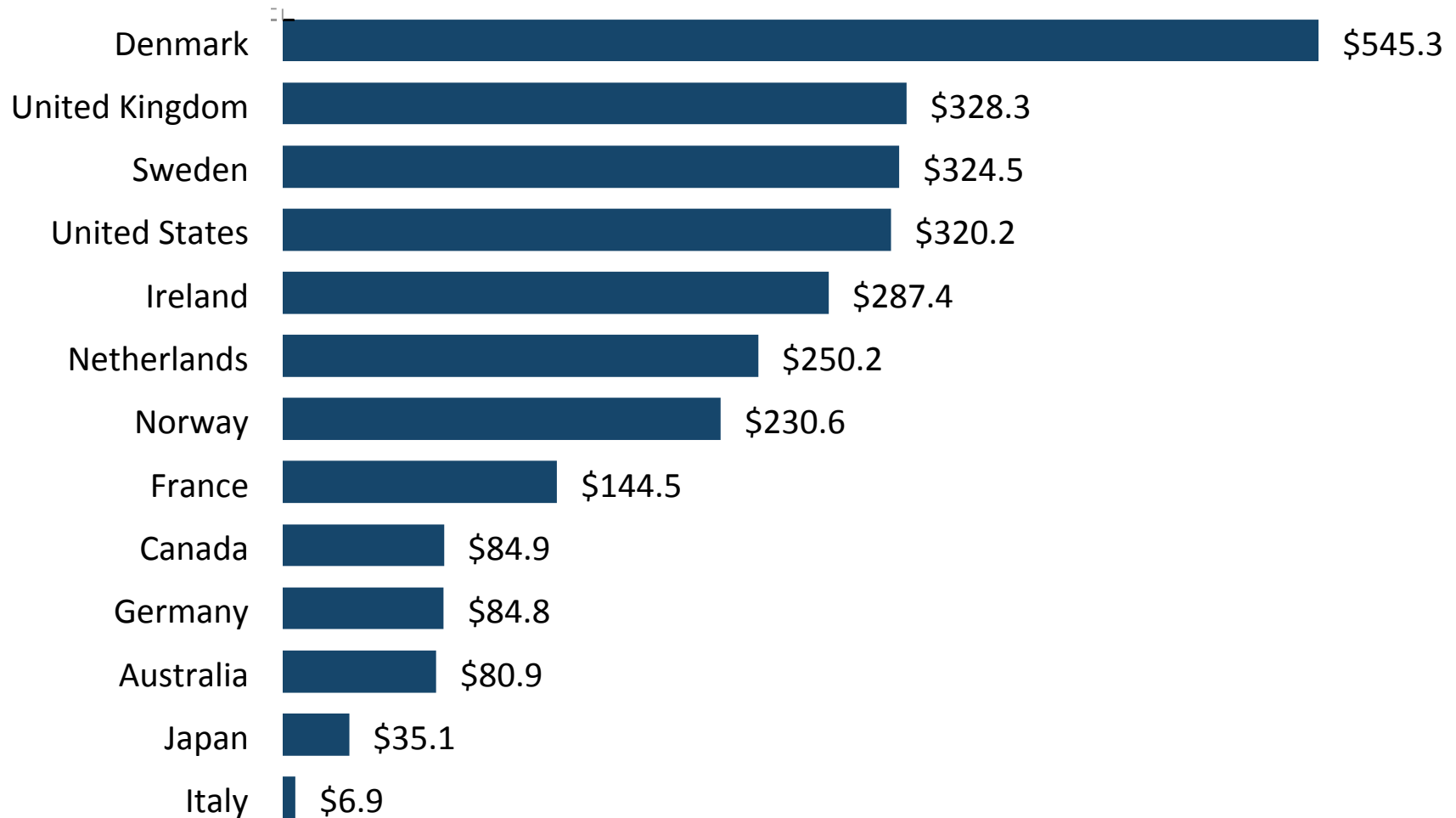
\$18.9 Billion
**Total Estimated Available
 Resources for HIV from All Sources**

*GDP = gross domestic product.

SOURCES: UNAIDS and Kaiser Family Foundation analysis, September 2013; UNAIDS, *2013 UNAIDS Report on the Global AIDS Epidemic*, September 2013; Global Fund to Fight AIDS, Tuberculosis and Malaria online data query, January 2013; UNITAID Annual Report, 2012; International Monetary Fund, World Economic Outlook Database, September 2013.



Assessing Fair Share 2: Donor Government Rank by Disbursements for HIV per US\$1 Million GDP*, 2012



*GDP = gross domestic product.

Sources: UNAIDS and Kaiser Family Foundation analysis, September 2013; Global Fund to Fight AIDS, Tuberculosis and Malaria online data query, January 2013; UNITAID Annual Report, 2012; International Monetary Fund, World Economic Outlook Database, September 2013.

U.S. Global Funding for HIV

USG Bilateral HIV Funding, FY 2001-FY 2014

In Millions

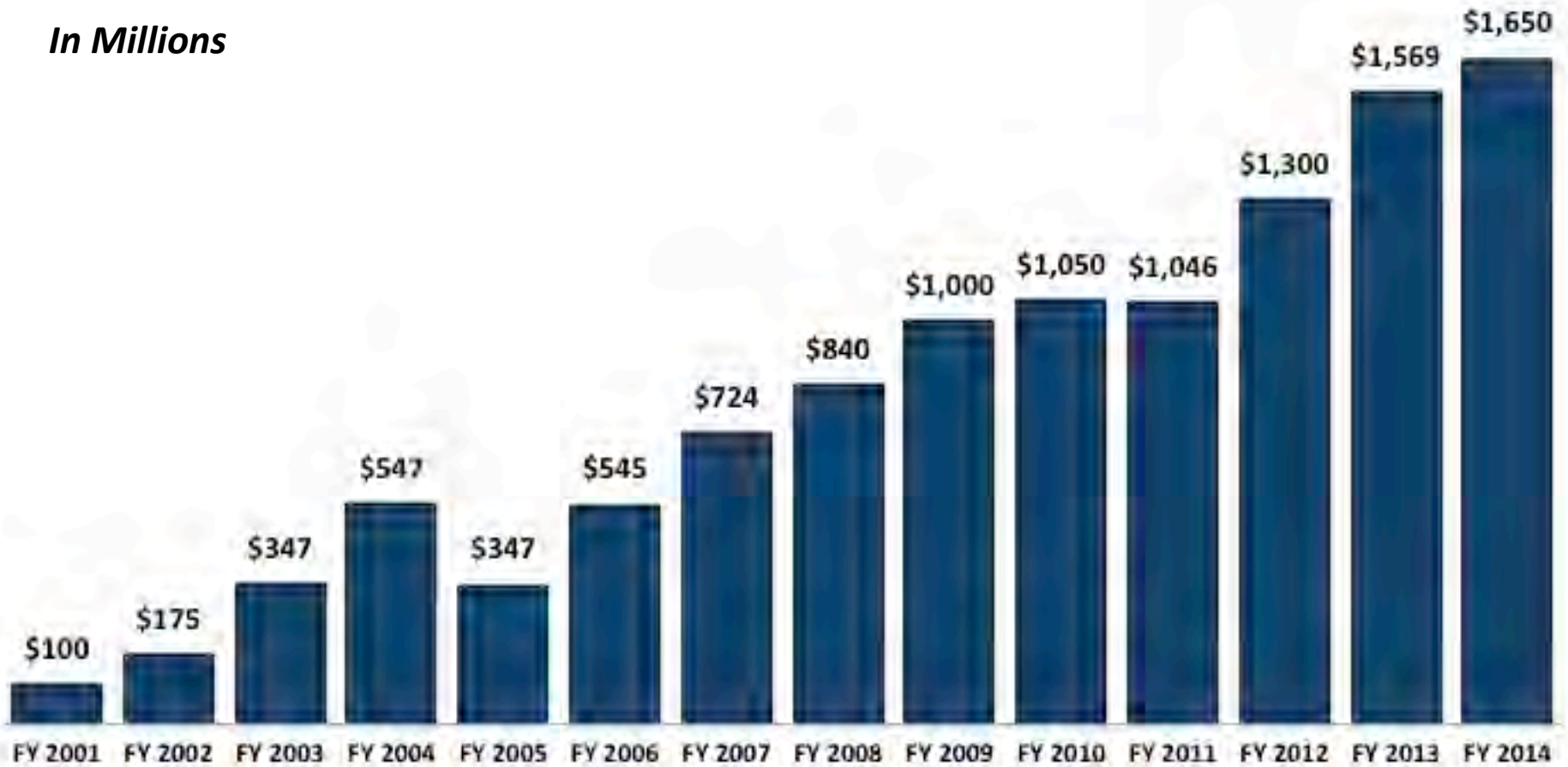


NOTES: FY 2014 bilateral HIV funding provided through NIH is not yet known and is presented at the FY 2013 level. Bilateral HIV funding through the CDC does not take into account a realignment of funds for business services that was included in the President's FY 2014 Budget Request. Includes funding for UNAIDS, IAVI, and Microbicides research activities.

SOURCE: Kaiser Family Foundation analysis of data from the Office of Management and Budget, Agency Congressional Budget Justifications, Congressional Appropriations Bills, and U.S. Foreign Assistance Dashboard [website], available at: www.foreignassistance.gov.

USG Contributions to The Global Fund, FY 2001- FY 2014

In Millions

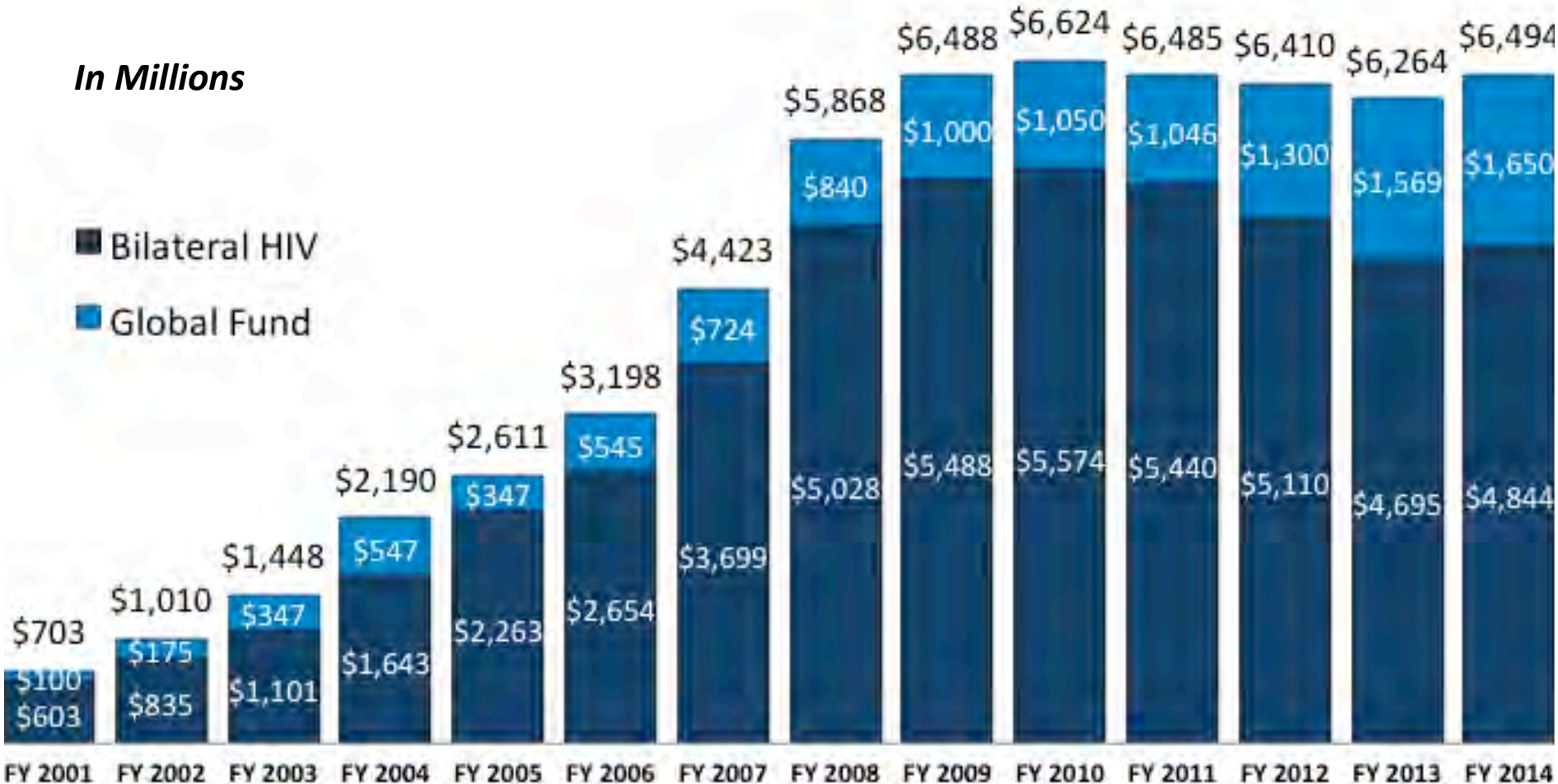


SOURCE: Kaiser Family Foundation analysis of data from the Office of Management and Budget, Agency Congressional Budget Justifications, Congressional Appropriations Bills, and U.S. Foreign Assistance Dashboard [website], available at: www.foreignassistance.gov.

USG Bilateral HIV Funding & Contributions to The Global Fund, FY 2001-FY 2014

In Millions

■ Bilateral HIV
■ Global Fund

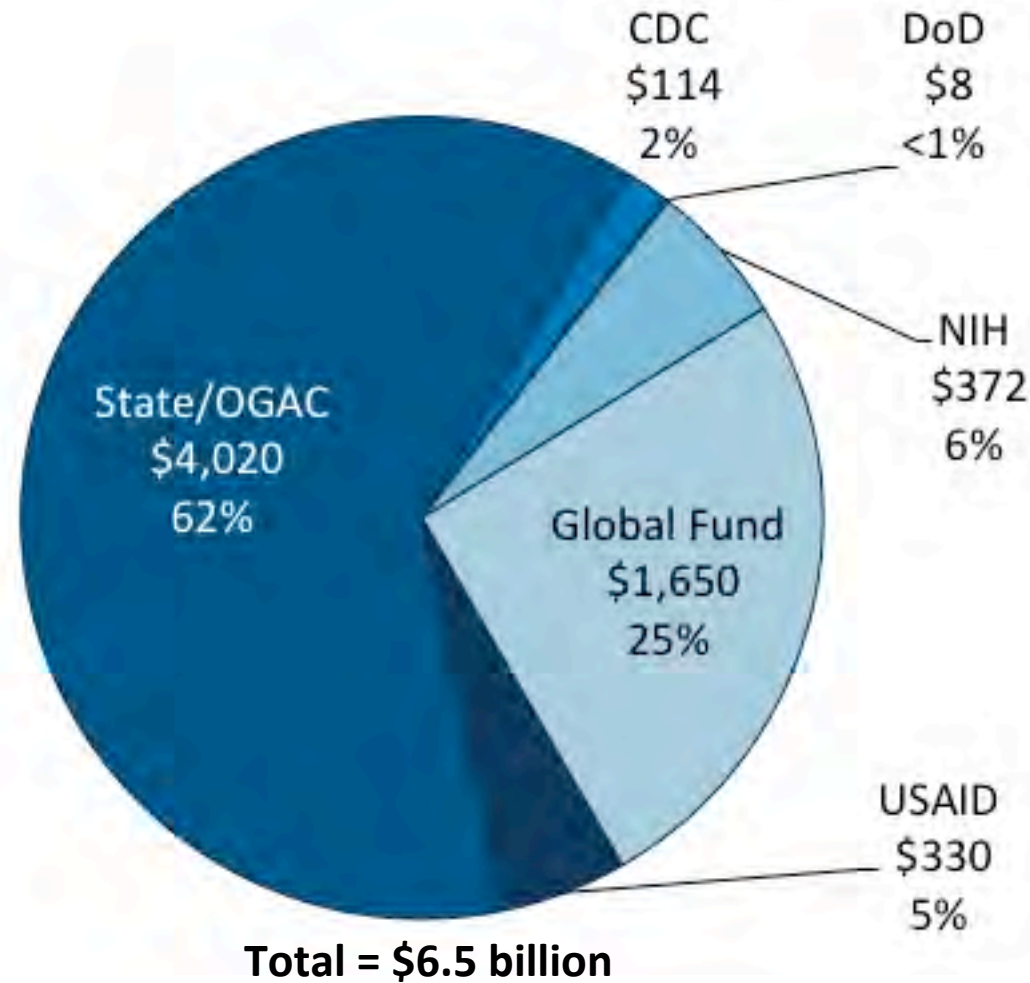


NOTES: FY 2014 bilateral HIV funding provided through NIH is not yet known and is presented at the FY 2013 level. Bilateral HIV funding through the CDC does not take into account a realignment of funds for business services that was included in the President's FY 2014 Budget Request. Bilateral HIV includes funding for UNAIDS, IAVI, and Microbicides research activities.

SOURCE: Kaiser Family Foundation analysis of data from the Office of Management and Budget, Agency Congressional Budget Justifications, Congressional Appropriations Bills, and U.S. Foreign Assistance Dashboard [website], available at: www.foreignassistance.gov.

USG Funding for Global HIV by Agency/Program, FY 2014

In Millions



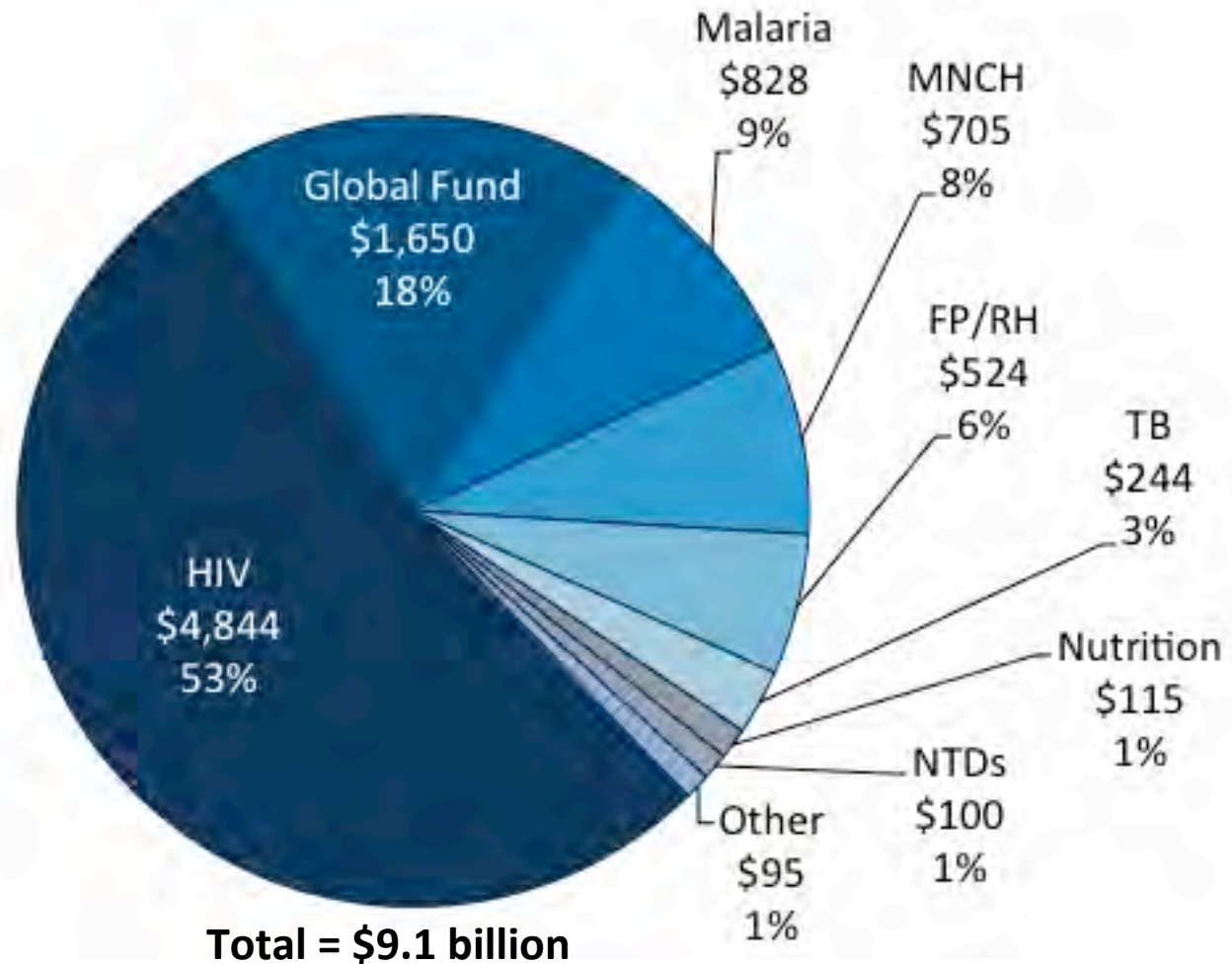
NOTES: State/OGAC includes funding for UNAIDS; USAID includes funding for IAVI and Microbicides research activities. HIV funding provided through NIH is not yet known and is presented at the FY 2013 level. CDC funding does not take into account a realignment of funds for business services that was included in the President's FY 2014 Budget Request.

SOURCE: Kaiser Family Foundation analysis of data from the Office of Management and Budget, Agency Congressional Budget Justifications, Congressional Appropriations Bills, and U.S. Foreign Assistance Dashboard [website], available at: www.foreignassistance.gov.

Funding for HIV as Share of U.S. Global Health Funding

USG Global Health Funding By Sector, FY 2014

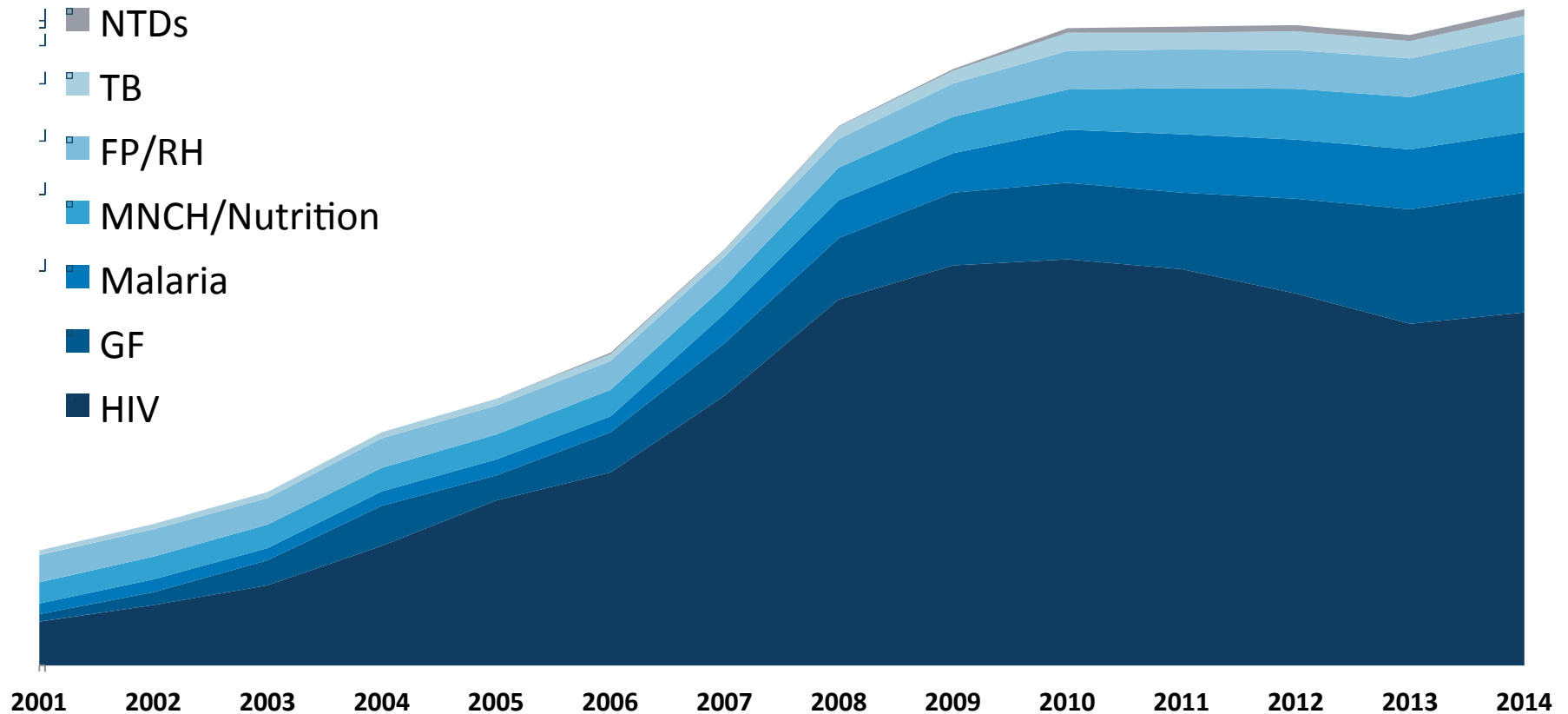
In Millions



NOTES: Represents funding through the Global Health Initiative (GHI) only. Some funding amounts provided through USAID, NIH, CDC, and DoD are not yet known and are presented at FY 2013 levels. HIV funding through the CDC does not take into account a realignment of funds for business services that was included in the President's FY 2014 Budget Request.

SOURCE: Kaiser Family Foundation analysis of data from the Office of Management and Budget, Agency Congressional Budget Justifications, Congressional Appropriations Bills, and U.S. Foreign Assistance Dashboard [website], available at: www.foreignassistance.gov.

Distribution of USG Funding for Global Health, by Sector, FY 2001-FY 2014



NOTES: Represents funding through the Global Health Initiative (GHI) only. The GHI was created as an initiative in FY 2009. All prior years represent the same programs and accounts which were not yet referred to as the GHI. Some FY 2014 funding amounts provided through USAID, NIH, CDC, and DoD are not yet known and are presented at FY 2013 levels. HIV funding through the CDC does not take into account a realignment of funds for business services that was included in the President's FY 2014 Budget Request.

SOURCE: Kaiser Family Foundation analysis of data from the Office of Management and Budget, Agency Congressional Budget Justifications, Congressional Appropriations Bills, and U.S. Foreign Assistance Dashboard [website], available at: www.foreignassistance.gov.

FY 2015

Key Dates Looking Forward

- **Early March**: President submits budget request to the Congress – March 4 and 11 (normally first Monday in February)
- **March**: House & Senate committees hold budget hearings
- **April 15**: Congress passes a House/Senate Budget Resolution
- **May through September**: Appropriations Committees draft and enact appropriations bills
- **October 1**: New federal fiscal year begins
 - Continuing Resolution: If appropriations laws are not enacted by October 1, Congress typically enacts temporary “band-aid” measures (called Continuing Resolutions) to keep programs operating until the laws are enacted

Broader Context: Non-Defense Discretionary (NDD) Funding Levels, 2013-2015

In Billions



NOTES: State & Foreign Operations (SFOPs) funding is included as part of Non-Defense funding in FY 2014 & FY 2015. The FY 2013 Non-Defense total is based on analysis by the Center on Budget and Policy Priorities; State & Foreign Operations (SFOPs) funding was included as part of Defense funding in FY 2013.

SOURCE: Kaiser Family Foundation analysis of Bipartisan Budget Control Act of 2013; Center on Budget and Policy Priorities, December 11, 2013.

U.S. Global Funding for HIV/AIDS

Thank You!

Jen Kates

Vice President; Director, Global Health & HIV Policy

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<http://globalhealth.kff.org/>



FCAA AIDS Philanthropy Summit

Resource Flows Panel



The Global Fund and its
partners together save
100,000 lives every month.

The Global Fund and Partners: A Decade of Results

- HIV incidence reduced by 33%
- Cases of malaria down 26%
- TB deaths decreased >40% in the past 20 years

Replenishment 2013: Country Commitments at Time of Pledging Conference*

- 25 countries
 - > 2010
- Increases
 - The United Kingdom
 - The United States
 - Canada
 - The European Union
 - The Netherlands
 - Nordic countries
 - The Republic of Korea
- Donors re-engaging
 - Italy
 - India
 - Thailand
- Other contributions
 - Cote d'Ivoire
 - Kenya
 - Malawi
 - Nigeria
 - Zimbabwe

Global Fund Replenishment: December 3, 2013

\$12 billion raised for 2014 – 2016

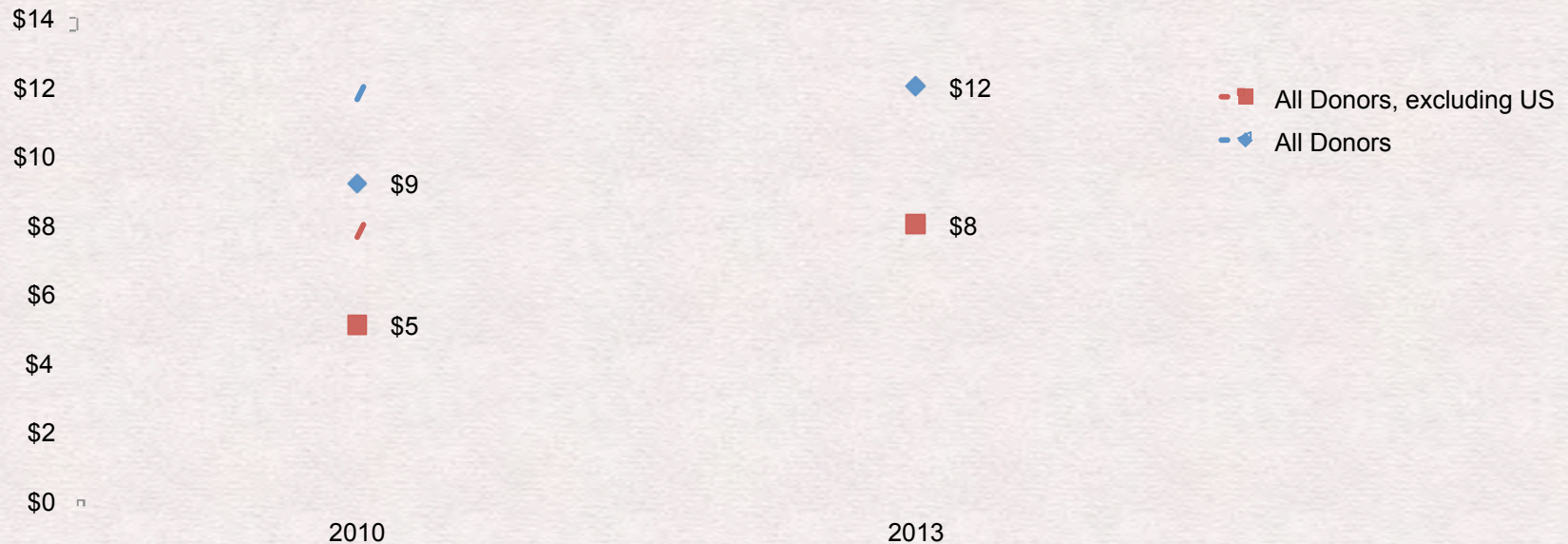
A 30% increase over \$9.2 billion secured in 2010

***“The Global Fund’s success speaks for itself.”
-- President Obama***



Pledges in October 2010 vs. Pledges in December 2013

Total amount pledged in billion USD



- In 2013, donors pledged US\$12B, representing a 30% increase from the 2010 pledge of US\$9.2B.
- Excluding the U.S., all other donors pledges increased by 55% (from U.S.\$5.1 to U.S.\$8B).

Private Sector Pledges (2010 – Q1, 2014)

Private Sector Donors - Total amount pledged in million USD



- By Q1 2014, private sector donors including BMGF had pledged U.S.\$640 million, a 78% increase from the U.S.\$ 59 in 2010.
- Excluding the BMGF pledge, private sector donors will have pledged U.S.\$140 million by Q1 2014, a 137% increase compared to 2010.
- Since 2010, new private sector companies (BHP Billiton, Ecobank, Vale and new (RED) Proud Partners: Belvedere, Coca-Cola, SAP, BAC) have joined our efforts, as well as two foundations/HNWIs (Dr Tahir and Mr Motsepe).



Pledges Announced After December 3rd

- **Switzerland:** \$68 million
- **Russia:** \$60 million
- **Bank of America:** \$10 million
- **SAP:** \$1 million
- **Patrice Motsepe:** \$1 million
- With U.S. pledge, increased the January 2014 number to **\$12.214B**



The U.S. Government: The Largest Contributor to the Global Fund

- For 2014 – 2016:
 - \$4 billion over three years
 - \$1 for every \$2 through 2014
 - + \$1B pending matching



The U.K.: Sending an Early Message

- Landmark pledge of £1 billion (\$1.6 billion)
 - Powerful signal to other donors
 - Consistent with British leadership in global health
- U.S. & U.K. are essential allies



Private Sector & Foundation Engagement

- Gates Foundation
- The Tahir Foundation
- (RED)
- Bank of America
- Chevron
- BHP Billiton Sustainable Communities
- Eli Lilly
- SAP
- Africa's Motsepe Family



“The private sector plays an important part in the Global Fund’s progress.”

- Bill Gates

Key Influencers: African Heads of State

- Strong support from **13 presidents of African countries** (*South Africa, Senegal, Tanzania, Nigeria, Malawi, Liberia, CIV, Ghana, Ethiopia, Kenya, Rwanda, Togo, Mozambique*)
- A number of implementer states were requested to make formal announcements on **increases in domestic financing** during the Replenishment cycle.
- **Nigeria** paved the way with US\$30 million pledge and a substantial increase in its own resources to the fight against HIV/AIDS and malaria.
- **Malawi, Kenya, and Zimbabwe** in addition to their pledges, also announced increased domestic financing for health.



Partner Procurement Framework

- Estimated \$140 million saved over two years
- Projected 8% savings per year on commodities
- Similar negotiations underway for ARVs & diagnostics



DFID Department for International Development



unicef



Office of the UN Secretary General's Special Envoy for Malaria

THANK YOU!

www.TheGlobalFight.Org



The FCAA HIV/AIDS Resource Tracking Project



GLOBAL PHILANTHROPIC
Support to Address HIV/AIDS

in 2012



Funders Concerned About AIDS
Mobilizing Philanthropic Leadership, Ideas, and Resources
in the Fight Against AIDS

- Surveys sent to over 500 funders in Spring/Summer 2013
- Though not all respond, about 95% of total from funders self-reporting

TOTAL FUNDERS FOR WHICH 2012 DATA WAS OBTAINED:

- 208 U.S.-based funders
- 38 E.U.-based funders
- New this year: 40 funders based outside of the U.S. & E.U.

Philanthropic Funding for HIV/AIDS in 2012

Total given by **208 U.S.-based** philanthropies to HIV/AIDS in 2012: **\$467 million**

Total given by **38 European-based** philanthropies to HIV/AIDS in 2012: **\$147 million**

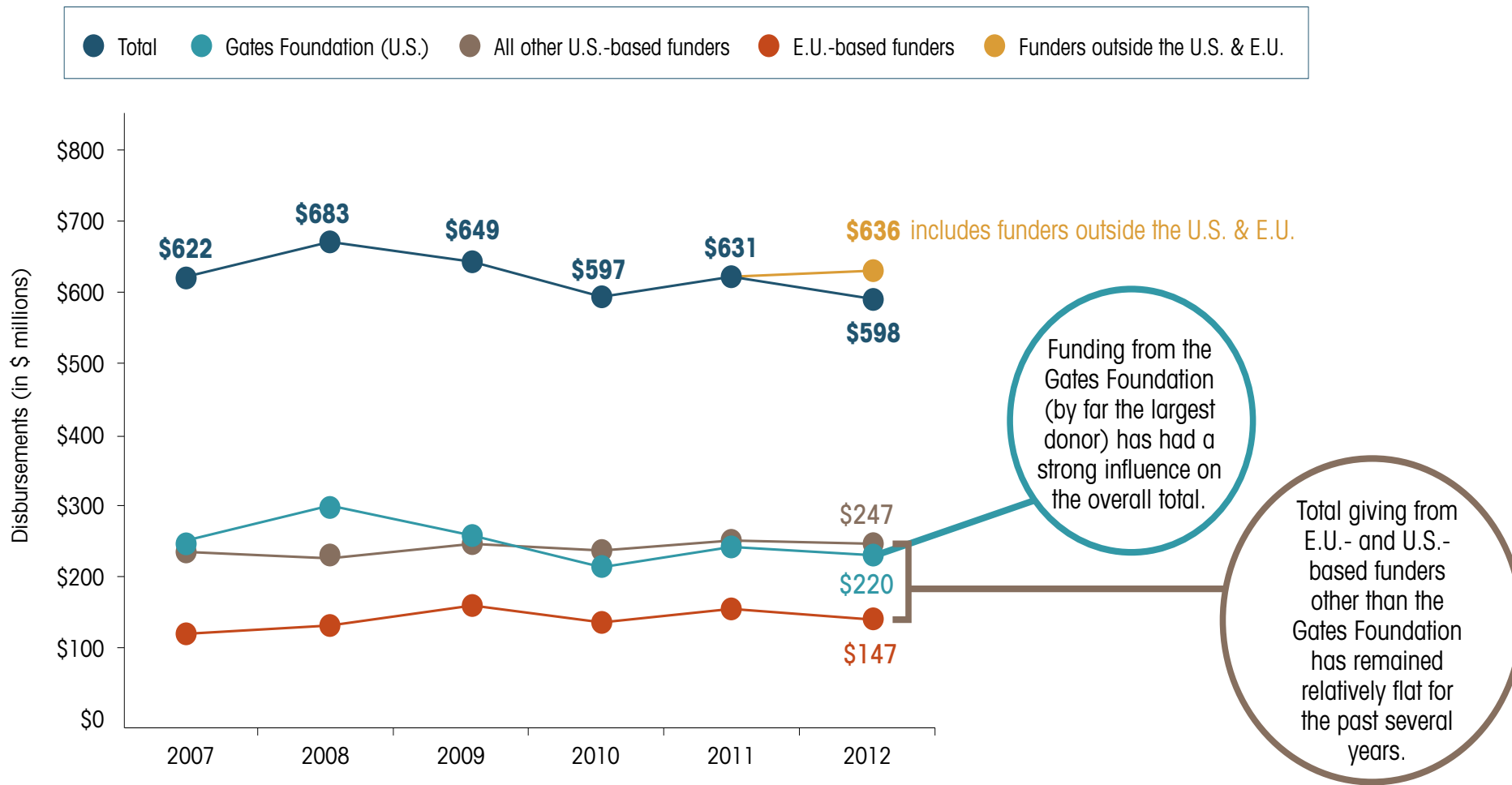
Total given by **40 philanthropies based outside of the U.S./E.U.** to HIV/AIDS in 2012: **\$ 38 million**

Combined global total philanthropic funding to HIV/AIDS in 2012: **\$636 million**

- 2012 total reflects a less than 1% increase from \$631 million in 2011
- Without new funders added, U.S. & E.U. combined decreased (\$33 million (5%) from 2011
- Grantmaking between U.S. and European philanthropies removed from total to avoid double-counting

Philanthropic Funding for HIV/AIDS 2007-2012

CHART 1 Total HIV/AIDS Philanthropic Giving 2007-2012^{3,4}



Philanthropic Funding for HIV/AIDS- A dynamic field of many individuals

Between 2011-2012:

- Both U.S.-based and E.U.-based funders decreased overall, but individual organizations make up the whole

U.S.-Based Top Funders 2011-12

Increased Giving : 37 of 68

Decreased Giving: 30 of 68

E.U.-Based Funders 2011-12

Increased Giving : 11 of 36

Decreased Giving: 25 of 36

- Most cite normal yearly fluctuation of grantmaking as the cause
- Two long-time AIDS funders closed doors in 2012
- Some shifting a part of their funding from AIDS-specific funding to other health areas

Top 10 Funders- U.S. and Europe

TABLE 1 Top 69 U.S. Philanthropic HIV/AIDS Funders in 2012
(ranked by amount of disbursements)¹⁴

↑ increased funding in 2012 compared to 2011

FUNDER NAME	DISBURSEMENTS (\$)	COMMITMENTS (\$)
1. Bill & Melinda Gates Foundation, WA ¹⁵	220,000,000	222,000,000
↑ 2. M•A•C AIDS Fund and M•A•C Cosmetics, NY	34,408,082	38,508,082
↑ 3. AbbVie Foundation and AbbVie, IL	19,150,990	19,150,990
↑ 4. Gilead Sciences, Inc., CA	16,707,441	10,002,286
↑ 5. ViiV Healthcare, NC ¹⁶	16,048,230	16,048,230
6. Ford Foundation, NY	14,042,550	16,414,619
7. Merck, NJ	11,499,912	–
↑ 8. Broadway Cares/Equity Fights AIDS, NY	10,843,796*	1,843,796
9. Philip T. and Susan M. Ragon Institute Foundation, MA	10,000,000	0
↑ 10. Johnson & Johnson, NJ	9,517,818	9,517,818

Top 10 represent
77% of all

TABLE 8 European Philanthropic HIV/AIDS Funders in 2012
(ranked by amount of disbursements)

FUNDER NAME	DISBURSEMENTS		COMMITMENTS	
	€	\$	€	\$
1. Wellcome Trust ⁴³	21,752,577	28,924,790	6,933,566	9,219,686
2. Children's Investment Fund Foundation, UK	13,962,229	18,565,825	8,902,056	11,837,223
3. ViiV Healthcare ⁴⁴	12,251,590	16,291,158	12,251,590	16,291,158
4. Sidaction	11,159,623	14,839,150	9,658,051	12,842,483
5. Elton John AIDS Foundation, UK	9,084,234	12,079,468	9,753,980	12,970,041
6. Comic Relief	6,381,673	7,375,206	1,703,217	2,264,798
7. STOP AIDS NOW!	5,406,000	7,188,455	3,812,000	5,068,884
8. Aids Fonds	5,122,000	6,810,815	6,424,000	8,542,107
9. The Monument Trust	3,447,745	4,584,528	1,964,665	2,612,450
10. Big Lottery Fund	2,786,979	3,705,896	2,786,979	3,705,896

Top 10 represent
79% of all

Snapshot of Funders Outside of U.S. and Europe

TABLE 11 Philanthropic HIV/AIDS Funders Based Outside of the U.S./E.U. in 2012

COUNTRY	USD
Argentina	
Fundación Huésped	\$1,131,667
Benin	
Institute of Cultural Affairs-Benin	45,000
Canada	
Stephen Lewis Foundation	7,491,345
Mennonite Central Committee (Canada)	1,581,462
Canadian Foundation for AIDS Research (CANFAR)	998,109
Farha Foundation	336,005
Presbyterian World Service & Development	216,701
Scotiabank	156,721
ACTLAP	144,000
Horizons of Friendship	116,325
Bracelet of Hope	108,470
CAP/AIDS Network (Canada Africa Partnership)	98,794
Community Education Services (CES) Canada	97,159
Help Lesotho	96,002
HopeShares Community Development Association	84,001
One Child's Village: A Global Orphans Foundation	47,967
The Olive Branch for Children	43,646
Sauti Moja	32,998
Friends of Mengo Hospital (Canada)	25,000
The Shanti Uganda Society	24,000
Dr Njenga Foundation of Sustainable HIV/AIDS Projects	8,361
Reach Out to Humanity	7,457
China	
Chi Heng Foundation	2,353,319
Hong Kong AIDS Foundation	273,344

Top 5 Funders:

1. National Lottery Distribution Trust Fund, South Africa
2. Stephen Lewis Foundation, Canada
3. Consorcio de Investigacion sobre VIH/SIDA/TB (CISIDAT), Mexico
4. Chi Heng Foundation, China
5. Mennonite Central Committee, Canada

COUNTRY	USD
Mexico	
Consorcio de Investigación sobre VIH/SIDA/TB (CISIDAT)	3,900,000
Fundación Unidos por un México Vivo	500,000
New Zealand	
New Zealand Lottery Grants Board	66,627
South Africa	
National Lottery Distribution Trust Fund	15,629,803
Living Hope Community Centre	1,134,927
The Africoid Trust	217,368
African Rainbow Minerals Limited (ARM)	110,881
HCI Foundation	65,394
Ackerman Pick n Pay Foundation	12,008

Geographic Distribution of Philanthropic HIV/AIDS Funding

Most funding for work with a global reach

\$268,023,800

\$8,594,227
FROM CANADIAN-BASED FUNDERS

\$236,337,647
TOTAL

\$150,237,743
FROM U.S.-BASED FUNDERS

\$85,873,817
FROM FUNDERS
BASED IN WESTERN
& CENTRAL EUROPE

International funding

Domestic funding

\$391,000
CANADA

\$100,000,000
UNITED STATES

\$17,000,000
WESTERN & CENTRAL
EUROPE

\$3,000,000
CHINA

\$50,000
JAPAN

\$4,000,000
MEXICO

\$45,000
BENIN

\$29,000
KENYA

\$50,000
THAILAND

\$58,000
COTE
D'IVOIRE

\$152,000
INDIA

\$186,000
ZAMBIA

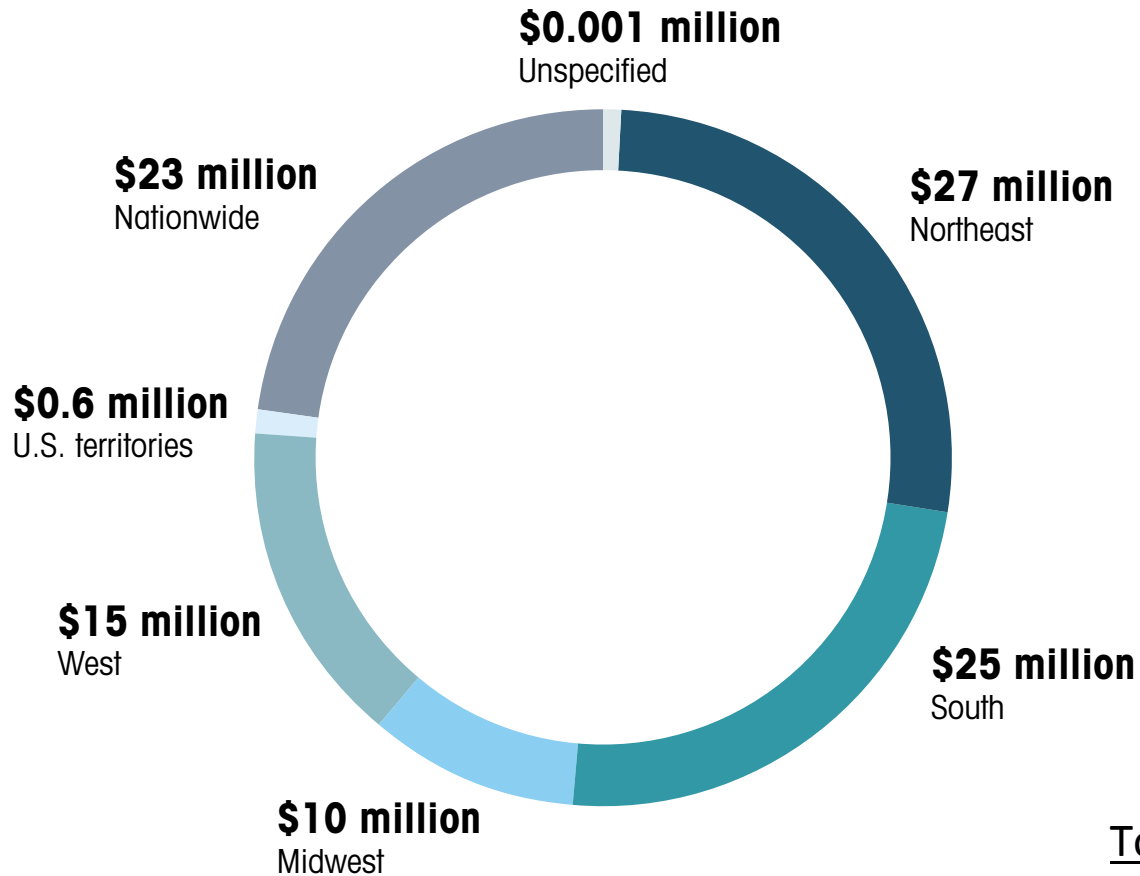
\$1,000,000
ARGENTINA

\$17,000,000
SOUTH AFRICA

\$83,000
NEW ZEALAND

Philanthropic HIV/AIDS Funding from U.S. for U.S. Epidemic

Regional Distribution of Domestic U.S. Philanthropic HIV/AIDS Funding in 2012
(by percentage of total domestic disbursements)



Top 5 U.S. domestic funders

1. M•A•C
2. Gilead
3. Broadway Cares
4. AIDS United
5. Merck

Top three categories

Treatment: \$23m
Prevention: \$21m
Social services: \$17m

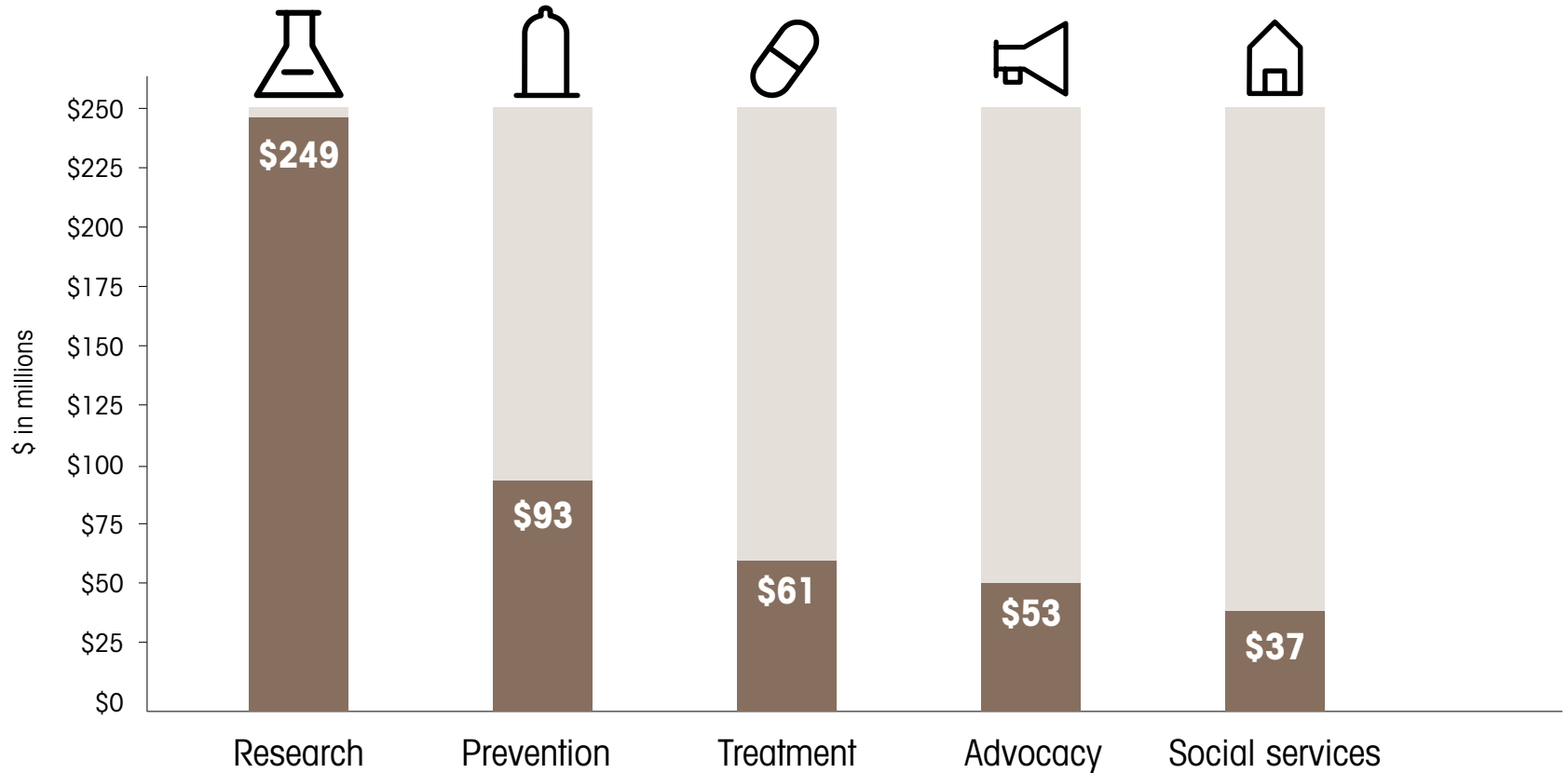
Top four target populations

1. Men who have sex with men
2. African Americans
3. Women
4. Homeless/impooverished persons

Intended Use of Philanthropic HIV/AIDS Funding in 2012 (U.S.- & E.U.-based funders only)

CHART
3

Top Five Intended Use Categories for 2012 HIV/AIDS Philanthropic Giving (U.S. & E.U.)



Target Populations of Philanthropic HIV/AIDS Funding in 2012

CHART
4

Target Populations of 2012 HIV/AIDS Philanthropic Giving

WOMEN

ORPHANS AND

HEALTH CARE WORKERS

PEOPLE WHO INJECT DRUGS

VULNERABLE CHILDREN

PEOPLE LIVING WITH HIV/AIDS

SEX WORKERS

YOUTH

MEDICAL RESEARCH

MEN WHO HAVE SEX WITH MEN

RURAL POPULATIONS

The FCAA HIV/AIDS Resource Tracking Project



- Ten pieces about context of funding
- Best practices from over 30 organizations
- Special features on:
 - the U.S. National HIV/AIDS Strategy and health reform
 - the treatment cascade
 - the Global Plan to eliminate mother-to-child transmission
 - integration of funding with other issue areas

[WWW.FCAAIDS.ORG/
RESOURCETRACKING](http://WWW.FCAAIDS.ORG/RESOURCETRACKING)



FCAA

Q&A



Thank you!

- + Visit <http://www.fcaids.org/resourceflows> for materials and a recording of today's call
- + Remaining questions? Share them with us by email sarah@fcaids.org or via Twitter @FCAA
- + On www.fcaids.org/resourcetracking you can find:
 - + The full report
 - + The press release and Q&A documents
 - + A list of all global HIV/AIDS philanthropic funders
- + Do you know of other private funders that are not captured in this report? Please share their information with Erika at erika@fcaids.org