

# Recommendations for Assessing and Reporting on Contributions toward the Sustainable Development Goals

Final Report for the Board of Trustees of the Calouste Gulbenkian Foundation

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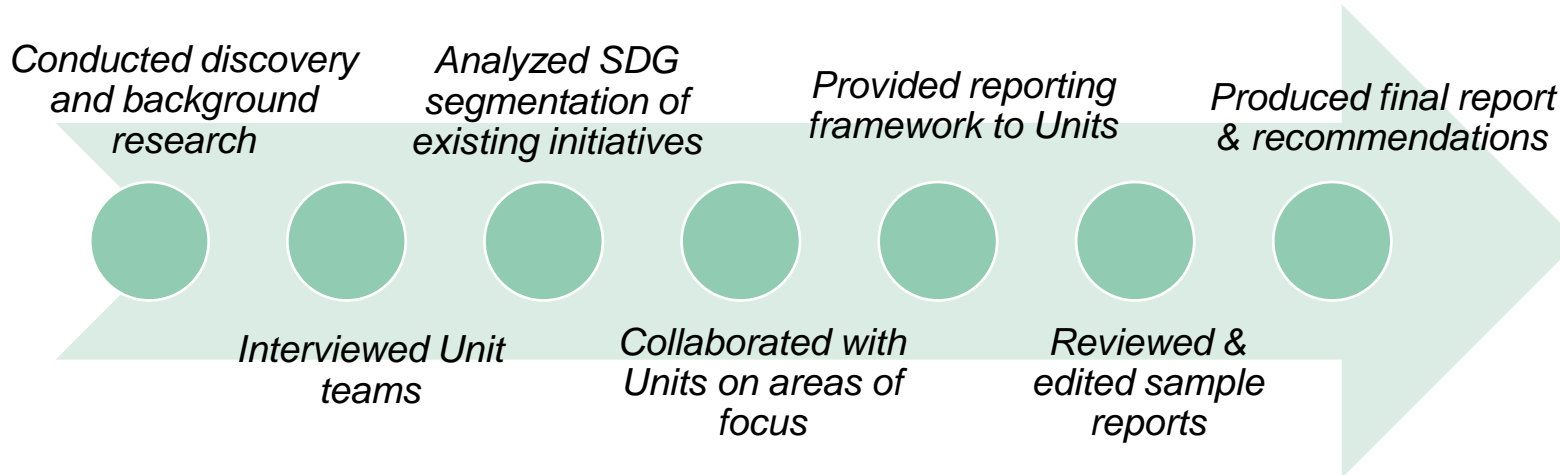
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# Project Overview

The Calouste Gulbenkian Foundation (FCG) engaged Rockefeller Philanthropy Advisors (RPA) to develop a method to assess and report contributions toward the Sustainable Development Goals (SDGs) for each of FCG's operational and grantmaking programs and areas of intervention. RPA took the following steps:



## Resources Created for FCG

16\* sets of analyses and indicator menus highlighting activities and results through an SDG lens

Edited sample reports for three projects

Database with 30+ data points that includes for selected initiatives:

Relevant SDG

Relevant indicator(s)

Calculations where applicable for indicators by initiative

Communications strategy and recommendations

*\*In addition to 14 Organizational Units, this includes COVID-19 grants and Board of Trustees' Memberships and Networks*

# A Multi-Pronged Reporting Strategy

## RPA's Process:

**Assessing** existing reporting practice of each Unit

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**Examining** what data was already being collected

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**Discussing** program goals with each Unit

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**Recommending** reporting framework (indicators included), separated into short- and long-term, to help measure impact

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**Drafting** recommendations and **iterating** with Units to achieve an agreed-upon document

## RPA's Reporting Recommendations Provide:

A **recommended minimum** reporting level indicating SDGs and indicators

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A more **outcomes-driven approach** aimed at describing progress toward achievement of SDGs

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Recommendations and tips for **narrative and qualitative approaches**, including highlights, storytelling, and personal interview responses to enhance outcomes

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Units may select from a menu of options to highlight their work

# New Report Format Example: Art Library and Archives

Description of primary goal as seen through SDG lens

**ART LIBRARY AND ARCHIVES**  
**Documents and books made available**

As an information service, Gulbenkian's Art Library seeks to select, incorporate, organize, and make available a diverse, quality and often unique set of informational resources to different members of the public. The goal for 2019 was to increase accessibility of new digital and physical information resources aimed at different public segments, in particular, by:

Updating Contemporary and Modern Portuguese Art resources

Digitizing and publishing special collections belonging to FCG

These activities fall within SDG Target 16.10:

**16.10** – "ENSURE PUBLIC ACCESS TO INFORMATION AND PROTECT FUNDAMENTAL FREEDOMS, IN ACCORDANCE WITH NATIONAL LEGISLATION AND INTERNATIONAL AGREEMENTS."

In 2019, we highlight the incorporation of *Catarina Figueiredo Cardoso's* artist books collection as well as *Hein Semke's* Archives, which are extremely valuable resources to understand Portuguese contemporary artistic expression.

*Catarina Figueiredo Cardoso's* collection is one of the most relevant private collections of both artist books and art editions from independent publishers. It contains more than 5000 works with different media and techniques and many of its copies are manually produced or have special print runs, with original drawings and paintings, prints and serigraphies. It is mostly comprised of works by Portuguese artists as well as foreign artists either working in Portugal or creating works related to the country. It also includes an important set of works by contemporary French artists.

Page 1

The new format includes narrative description, SDG definitions, visuals, visual data, and storytelling to highlight compelling accomplishments in 1-2 pages

Storytelling about the collection

Visual data here


Images throughout

How we Measure Progress on SDG Goal:

MEASURES AND METRICS	RESULTS
NUMBER OF USERS, LOANS AND DIGITAL CONTENT VIEWS	<b>2,400 ACTIVE USERS</b> borrowed <b>42,000 DOCUMENTS</b> <b>8 MILLION PHOTOS</b> viewed on flickr
GROWTH IN AVAILABLE DIGITAL CONTENT – TOTAL AND AS A PERCENT OF SPECIAL COLLECTIONS	<b>23 NEW COLLECTIONS</b> DIGITIZED <b>+8,000</b> of the 58,000 images were PUBLISHED
ACQUIRED BIBLIOGRAPHY AND NEW SPECIAL COLLECTIONS	<b>1,600 NEW CONTEMPORARY PUBLICATIONS</b> on 20 <sup>th</sup> and 21 <sup>st</sup> century Portuguese art <b>3 NEW SPECIAL COLLECTIONS</b>
ANNUAL PUBLIC SATISFACTION SURVEY	<b>86% OF RESPONDENTS</b> GAVE THE BAA EITHER 4/5 OR 5/5 <b>97% WOULD RECOMMEND IT TO OTHERS</b>


Note: The numbers are rounded.

**Hein Semke** (Hamburg, 1889 - Lisbon, 1995), an artist of German origin and political activist, settled permanently in Portugal in 1932, fleeing Hitler's seizure of power. A companion of great artist national names, such as Almada Negreiros, Sarah Afonso and Vieira da Silva, among others, he saw in 1935 his sculptural group *Camaradagem na Derrota* (which was part of the Courtyard of the German Evangelical Church of Lisbon) destroyed by Nazi elements from the German colony in Lisbon. In the 1940s, he dedicated himself to ceramics, becoming one of the most notable renovators of this artistic expression, which he abandoned in 1963 due to silicosis. Without ever leaving sculpture, he devotes himself to painting and printmaking, then making most of his 34 artist books that are like a summary of his recurring themes. With a vast production and an intense exhibition activity, it brought to Portuguese artistic life an expressionist dimension, where religious mysticism and the humanist message go hand in hand with the pantheistic celebration of the world.




Alongside with the incorporation of new materials and to ensure its widespread use, around 64,000 documents had to be organized and described and several special collections digitized and published on the Web.

Users can thus access a vast array of new and unique materials about architecture, design and visual arts. For instance, the *Yemen Architecture Collection*, created by the architect *Fernando Varanda*, between 1973 and 1992, makes an extensive inquiry about architectural constructions and urban organization in the cities of Yemen; the geography of natural regions in different areas throughout the North of the country; prehistoric and pre-Islamic history; citadels, temples and dams; construction of agricultural territory; construction methods, decorative options, types of houses, mosques, markets and urban atmospheres. Users can experience a distant and peripheral civilization, which contrasts, in the several aspects, with the European and Western reality.



One of the most important Portuguese designers in the 20th century was, no doubt, *Daciano da Costa* (1930-2005), who was even called the "Pope of Portuguese Design." Born in Lisbon, we was also an architect, entrepreneur and pedagogue. His considerable works, which significantly marked contemporary Portuguese architecture are still iconic today. These include, among others, design projects for the Rectory of Lisbon University (1960), Calouste Gulbenkian Foundation (1966-2004), the National Library of Portugal (1965), Madeira Hilton Hotel (1970), *Belém Cultural Center* (1990) and the requalification of *Figueira Square* (1999). Many of these projects are represented in the *Daciano da Costa Photographic Collection*, originally created for the "*Daciano da Costa, designer*" exhibition (Calouste Gulbenkian Foundation, 2001).

For our users, in their own words, the outcomes of these kind of projects and activities, make the library "an oasis of culture and creativity potential" because it has an "excellent space and use conditions. The staff is thoughtful, friendly and helpful (and a) great collection." In fact, "all the library team members are amazing [...]. I have recommended it to several of my History of Art colleagues." [Therefore], "It is our little oasis where we manage to focus work and if we are tired and need a break, we will have the amazing garden to rest." **"I genuinely enjoy the library."**



Page 2

The background is a solid teal color with a pattern of white-outlined hexagons of varying sizes and orientations scattered across the page.

## II. Why Align with the SDGs and Agenda 2030

# Why Align with the SDGs and 2030 Agenda



More effective program planning and assessment processes within FCG



FCG gains increased sector leadership



Enhanced internal and external communication



New opportunities to share highlights and impact of FCG's work







# More Effective Program Planning and Assessment Processes

## Address inconsistency

of definitions and measurement *among* programs, and *between* programs and departments and the outside world (a common problem in the philanthropy sector)

## Measure outcomes and longer-term impact

instead of a focus on measuring inputs, outputs, and activities

## Use proven targets

to support positive social, environmental and economic transformation instead of arbitrary target-setting



# Increased Sector Leadership

## Become a leader

in Portugal, within Europe, and internationally, in measuring and reporting its work through an SDG lens

Generate positive peer pressure among other foundations

Expand FCG's visibility on this subject and global reach

Find new partners and themes supporting systemic change and impact



# Enhanced Internal and External Communications

## Internal

- Provides a common language for impact
- Expresses strategic priorities across Units
- Examines and reports on work in a more holistic way

## External

- Connects to work of other institutions
- Attracts government partnerships, especially in PALOP countries
- Leverages memberships in various networks and organizations



# New Opportunities to Share Highlights and Impact of FCG's Work

SDG-specific events increase reach

potential partnerships, and ability to share progress and learning

UN processes and government and business convenings

catalyze tipping points for transformation because these sectors have far greater reach and resources

SDG lens reporting in FCG's Annual Report will attract new readership

and expand knowledge among current constituents

# Despite SDG Benefits, Many Foundations Don't Use Them

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## Benefits

- Provide a common framework for collaborative action
- Catalyze opportunities to leverage philanthropy's more limited resources with official funding, government policy-making, and that of other foundations
- Enhance rigor in planning, monitoring, and evaluation
- Created by experts with significant and global civil society input over several years

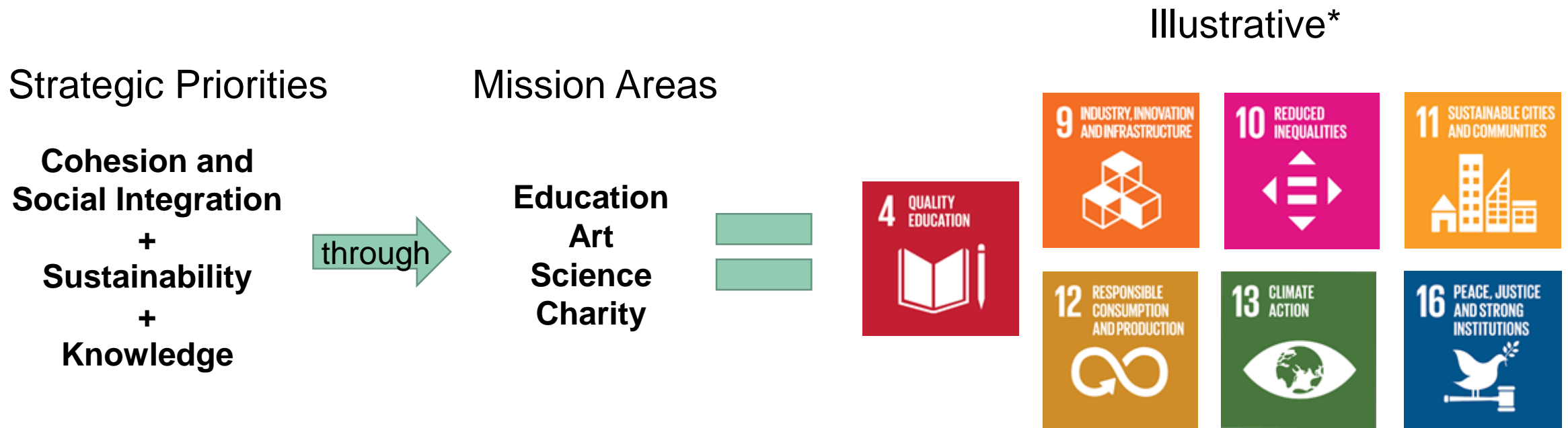
## Barriers

- Human and financial resources needed to launch a new planning, assessment and reporting system
- Learning required among staff
- Resistance on a board of trustees or leadership level even for institutions generally supportive of (or even funding) the SDGs

# III. Recommendations for Implementation

# Recommendation 1: Agree Priority SDGs for the Foundation

Decide and ensure your leadership and teams are aligned on the top SDGs on which you will focus, across all Units. We recommend these 7 as they most closely align with your strategic priorities, your mission areas, and perspectives shared during our interviews.



\* Based on the projects analyzed in the context of this exercise.

## Recommendation 2: Agree on 15-20 Priority Targets

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- Focus on no more than 20 priority targets across FCG to help drive internal alignment, common language, and to highlight interrelationships among units
- Finalize selection based on strategic priorities, current programs, and organizational mission
- Recommended targets based on analysis, findings, and research

## Recommendation 3: Build Buy-in and Staff Agreement

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Empowerment of this process and those leading it to drive change will help improve planning outcomes and impact. Staff will be expected to understand the SDGs better, and how SDG clusters are mutually reinforcing.



# Recommendation 4: Operationalize Across Planning, M&E and Reporting Functions

1. Set goals and annual reporting timeline and guidelines

2. Finalize SDG Targets selection for each Unit

3. Agree criteria for selection of projects to be analyzed (see more details on following page)

4. Survey staff to determine additional resources needed to implement

5. Adjust the internal system so that each initiative can be coded for SDGs

6. Determine cross-Unit research methods (e.g., joint surveys)

7. Liaise between Units and Communications Team to harmonize reporting efforts

## Recommendation 4 (continued): Potential Criteria for Projects and Lines of Work to be Analyzed

For materiality, choose those with larger budgets

For funder accountability, choose those for which you sought external partners

For beneficiary accountability, choose those aiming to serve marginalized or particularly vulnerable groups

For coherence, choose those that align with foundation-wide priorities

For learning, choose those that are perceived as particularly successful or as failures

To document impact, choose those reaching large populations or seen as transformative

To understand ingredients for scaling, choose those that promise ripple effects

# Recommendation 5: Institutionalize by Clarifying Expectations and Building Capacity

Increase budget for collecting SDG data

Focus data collection on improving impact

Assess capacity needs for monitoring and evaluation

Select evaluation partners familiar with the SDGs

Provide training on new types of reporting needed

Align on and communicate what reporting is no longer needed

# Recommendation 6: Integrate the SDGs into FCG Communications



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## **Throughout the process, share data**

- Seek out platforms such as [SDGfunders.org](https://sdgfunders.org) to share information about financial contributions towards a specific SDG and the SDG Philanthropy Platform to align with other donors about events and themes
- Seek out opportunities to share the new lens at conferences and other events hosted by organizations in which FCG is a member or partner
- Participate in global conferences outside of FCG's normal scope that may be focused on relevant SDG themes, to share FCG's work more broadly
- Host workshops and SDG events at FCG's headquarters and Delegations, as appropriate



# General Guidelines for Reporting on the SDGs

- The communications approach for your overall reporting should be to contextualize, amplify key initiatives and outcomes, and simplify, while ensuring an approachable, robust publication. Information “roll-ups”, repeated framing, navigation clues, cross references, sub-titles, bullets, clear hierarchy and hyperlinks (for online versions) will help with this.
- Don’t feel as though you must report on every SDG, every measure, and every program. With too much information, it is difficult for the reader to know what is important. For each unit, you should aim to **report only on the most relevant SDG(s)** based on:
  - The SDG upon which the business unit will have the most impact and best reflects your work
  - Consideration of your commitments and goals as articulated in [Gulbenkian’s 2018 – 2022 Strategy](#)
  - How compelling the relevant SDG is to your target audience outside your unit (leadership, the Board, the public, etc.)
  - What information or insights will provide the most learning for your colleagues and program partners or community members
  - Insights that are most topical in terms of current issues in society.



# General SDG Reporting Guidelines *cont'd*

- To the extent possible, use graphics, tables and charts for reporting on the SDGs
- Given the detail currently in your annual reports, putting the SDG information in summary tables will make it more concise and easier to tie directly to the targets and reduce the potential for redundancy with the highly informative and detailed approach FCG Units typically take
- Ensure all SDG reporting follows the 4Cs:
  - Concise—focus on key priorities and the most significant information
  - Consistent—across units and done in a way that can show trends over time
  - Current—not just the past, but also show where you are heading
  - Comparable—to allow for benchmarking and evaluation by peers



# Sample Chart for Introduction

- A potential chart at the beginning of a report could show a high-level overview.
  - Have the SDGs across the top of a table and the initiatives in the left column, categorized by color based on which of the three major areas they fall within (Art and Culture, Innovation and Sustainable Development; Science and Knowledge).
    - Include a check or dot for the SDG that each initiative relates to
    - In the far-right column, include a brief global statement of the goal of that initiative
  - At the bottom of the relevant SDGs, you could paraphrase the SDG targets to which Gulbenkian’s initiatives for that SDG relate. If this is too varied across the initiatives, you can address later in the report.

			Goals
Museum			Understanding, artistic activity
Music	●		Musical culture and creation
Libraries	●	●	Legacy, engagement, education
Artistic Support			Innovation in literature and performing arts
Civic Role of the Arts		●	
Social Cohesion			
Social innovation	●		
Climate Action			
Oceans			
Society and Democracy....			

## Adding SDG Detail for Each Section

- To help contextualize, each section could have a similar chart highlighting the SDGs for that section, with an added level of detail such as the specific SDG targets for that section
  - For example, at the beginning of the Innovation and Sustainable Development section, there could be a call-out box after the introduction to that section highlighting the different sub-sections along with the SDG goals each of those sub-categories speak to
- Further, relevant initiatives within each sub-category, could have a box with a similar background color that highlights the specific initiative, goal, and target (see below in the Guidance for Individual Unit Reporting section for additional detail on what that might include)
  - This approach allows one to get a big picture view, while also seeing additional detail where appropriate

# Guidance for Individual Unit Reporting



Each unit should have a consistent approach to their reporting of the SDGs – for consistency and to help report compiler or writer



Creating a template for units will be helpful



Units will need to rely on the recommendations from RPA regarding SDG Targets and monitoring and reporting



Foundation-specific goals should be included, contextualized with the SDG Target



Goals should be framed as SMART to the extent possible to help measure, monitor and communicate in a compelling manner

# SDG Reporting Questions (Template) for Units

- Initiative Name:
  - Key goal for the initiative:
  - If the goal is achieved, what SDG is it most closely aligned with?
  - For the primary SDG, what information are you measuring / including to support your statement of where you stand on that goal? (This information will be based on a selection of the monitoring/reporting suggestions provided in the recommendations from RPA.)
  - What activities were undertaken relative to that goal?
  - What outputs have been generated through those activities?
  - What are the outcomes; what changes have occurred in the target audience?
  - What changes more broadly have occurred as a result of the outputs of the activities?
  - Fill out the following table for each key initiative impacting the SDGs.
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# SDG Targets and Goals Table (Template) for Units

KEY GOAL FOR INITIATIVE	PRIMARY SDG ADDRESSED	WHERE YOU STAND ON KEY GOAL
Goal 2 for initiative	Other SDGs addressed	Status on goal 2
Goal 3 for initiative	Other SDGs addressed	Status on goal 3

Notes on filling out table:

- Limit each goal to one sentence if possible
- Express goal in the context of the SDG targets relevant to that goal to the extent possible
- Status for goals can be up to three sentences

## Additional Suggestions

- Assign one team or person to be responsible to “roll up” the reporting by the individual business units
- Leverage Communications team or independent writer to unify reporting
- Highlight SDGs in each section where applicable, but ensure detail is less, the higher the hierarchy of the report section
- Ensure consistent formatting in terms of graphics and background for the SDGs call outs to create a through-line

# Other Potential Graphics to Consider

Materiality	Theme	Related SDGs (Target Numbers)
Enhancement of Local Industrial Bases & Quality of life	Development of the Social Infrastructure	 Ensure healthy lives and promote well-being for all at all ages (3.8)  Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation (9.1, 9.4, 9.5, 9.a, 9.c).  Make cities and human settlements inclusive, safe, resilient and sustainable (11.2)
	Provision of Safe, Reliable Products and Services	 Ensure availability and sustainable management of water and sanitation for all (6.1)



SDG	PILLARS						BACKBONES					
	Engaging the local communities	Engaging the work with	Aiming at operating & innovation	Decarbonizing the energy mix	Customer focus	Digitalization	Occupational health and safety	Sound governance	Environmental sustainability	Sustainable supply chain	Economic and financial value creation	
1	<input type="checkbox"/>											
2	<input type="checkbox"/>	<input type="checkbox"/>										
3	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>					
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
5	<input type="checkbox"/>											
6									<input type="checkbox"/>			
7	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

	Reporting quality criteria	Grade	Comments
<b>Understanding the SDGs</b>	Reporting the business case for SDG action	D	This is an important area for improvement – less than one in ten reporting makes the business case.
<i>Further information, examples of good practice and recommendations</i>	Discussing the SDGs in the CEO/Chair's message	C	Discussing the SDGs in leadership messages is still some way from being. This is a relatively simple way for many companies to improve their report.
	Assessing the business's impacts on the SDGs	A (-)	Most reporting companies discuss their SDG impacts but reporting is largely focusing on the positive but not the negative. Credible reporting requires the A minus grade.
<b>Prioritizing the SDGs</b>	Prioritizing the most relevant SDGs for the company	A	A majority of companies do prioritize the SDGs they consider most relevant. However, a quarter identify all 17 SDGs as priorities. It can be challenging plan and implement meaningful action on such a wide range of goals. KPI encourage clients to focus attention on a smaller number of SDGs where biggest impact.
<i>Further information, examples of good practice and recommendations</i>	Disclosing the method used to prioritize the SDGs	B	Just over half the reporting companies explain how they prioritize the SDG for improvement here.
	Identifying specific SDG targets relevant to the business	D	Only one in five companies has gone beyond the 17 overall SDGs to identify targets they will focus on.
<b>Measuring SDG performance</b>	Setting SDG performance goals for the business	C	Reporting cycles may account to some extent for the lower performance. However, the research suggests that many companies are finding it challenging to integrate support for the SDGs into specific, actionable and measurable performance goals.
<i>Further information, examples of good practice and recommendations</i>	Setting SMART performance goals	D	
	Disclosing the indicators used to measure SDG performance	D	