The Bill & Melinda Gates Foundation

Gates Foundation (57.9)
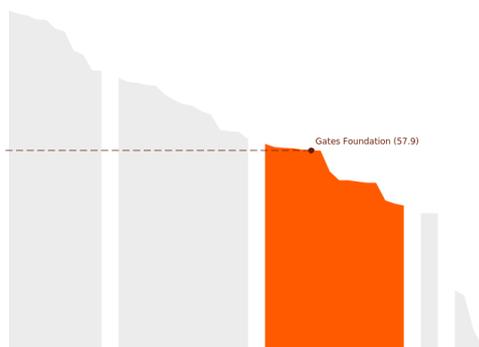
SCORE: 57.9	POSITION: 32/47	2020 FAIR

OVERVIEW

The Bill and Melinda Gates Foundation (Gates Foundation) is the largest private foundation in the world. It provides grants to support initiatives in education, global health and development, and community giving in the Pacific Northwest region of the United States. It became an IATI member in 2013 and published its first IATI data in March 2014.

2018 FAIR	2016 FAIR	2014 FAIR	2013 VERY POOR

Organisational planning and commitments
10.9 / 15

Finance and budgets
16.1 / 25

Project attributes
15.7 / 20

Joining-up development data
12.7 / 20

Performance
2.5 / 20

ANALYSIS

The Gates Foundation's score has increased by more than ten points since 2018. However, it remains in the 'fair' category.

The Gates Foundation now publishes to the IATI Registry on a quarterly basis, rather than annually as was the case in 2018.

It made all **organisational planning and commitments** indicators, apart from country and organisational strategies, available on the IATI Registry. It scored below average for the **joining-up development data** component as a result of failing the conditions, tenders, and contracts indicators. The Gates Foundation also scored below average for the **performance** component. This was in large part because it scored zero points for pre-project impact appraisals, results, and reviews and evaluations. It did not publish any of this information, including objectives, to the IATI Registry. For the **finance and budgets** component, the Gates Foundation scored well against all indicators, but the absence of a disaggregated budget at the organisational level and project budget documents at the activity level prevented it from scoring higher. It scored well on indicators for the **project attributes** component except for the sub-national location indicator, for which it received a score of zero.

Specifically, the Gates Foundation needs to move beyond providing national project locations to include sub-national location information. Data users have repeatedly voiced that this detail, essential for pinpointing the precise location of an investment, is one of the most important data points they seek. To improve scores on reviews and evaluations, it needs to link project-specific evaluations to individual activities, rather than providing only sector or regional evaluations. Finally, it should make project tenders more easily located by using project codes or some similar mechanism. The current practise of linking to the 'grant opportunity' website consistently failed to produce the documents we sought.

RECOMMENDATIONS

- The Gates Foundation should review and address its current approach to project performance and impact. Important indicators such as pre-project impact appraisals, project objectives, results, and reviews and evaluations are vital for internal learning, continuous improvement, and broader development effectiveness.
- It should focus on improving procurement transparency by addressing shortfalls in the

publication of conditions, tenders, and contracts.

- Given the scale of its funding in many countries, the Gates Foundation should seek to increase the frequency of its publication to monthly, rather than quarterly, to provide a more up-to-date picture of its activities to national stakeholders.
- It should commence publication of sub-national location information to aid local stakeholders seeking to understand precisely where project activities are taking place.

DEEP DIVE

Organisational planning and commitments

Score: 10.9 / 15

ABOUT COMPONENT

This component looks at the overall aims and strategy of an organisation. We check for any public commitments to aid transparency. We also make sure audits are in place and if planning documents have been published, including by parent organisations (including national governments) where applicable. We make note of any Freedom of Information laws and critically, we make sure that organisations have tried to make their information easy to access and understand. You should not have to be an expert in open data to be able to find and use this information.

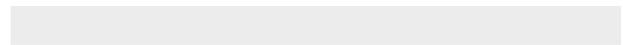**Quality of FOI legislation**   Score: 1.25

Accessibility   Score: 1.25

Organisation strategy   Score: 0

Annual report   Score: 1.88

Allocation policy   Score: 1.88

Procurement policy   Score: 1.88

Strategy (country/sector) or Memorandum of Understanding   Score: 0.94

Audit   Score: 1.88

Finance and budgets

Score: 16.1 / 25

ABOUT COMPONENT

This component is critical to allow you and anyone else to follow the money. We expect to find the total budget of the organisation being assessed, right down to individual transactions for each development activity. In particular, forward-looking budgets from donors are important for partner country governments to be able to plan their own future finances.

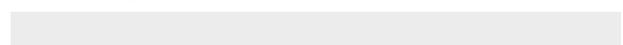**Disaggregated budget**   Score: 0
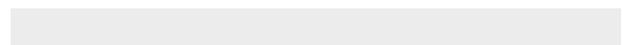
Project budget   Score: 3.17
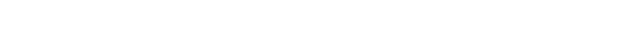
Project budget document   Score: 0

Commitments   Score: 3.17

Disbursements and expenditures   Score: 3.16

Disbursements and expenditures — Score: 3.16

Budget Alignment — Score: 3.13
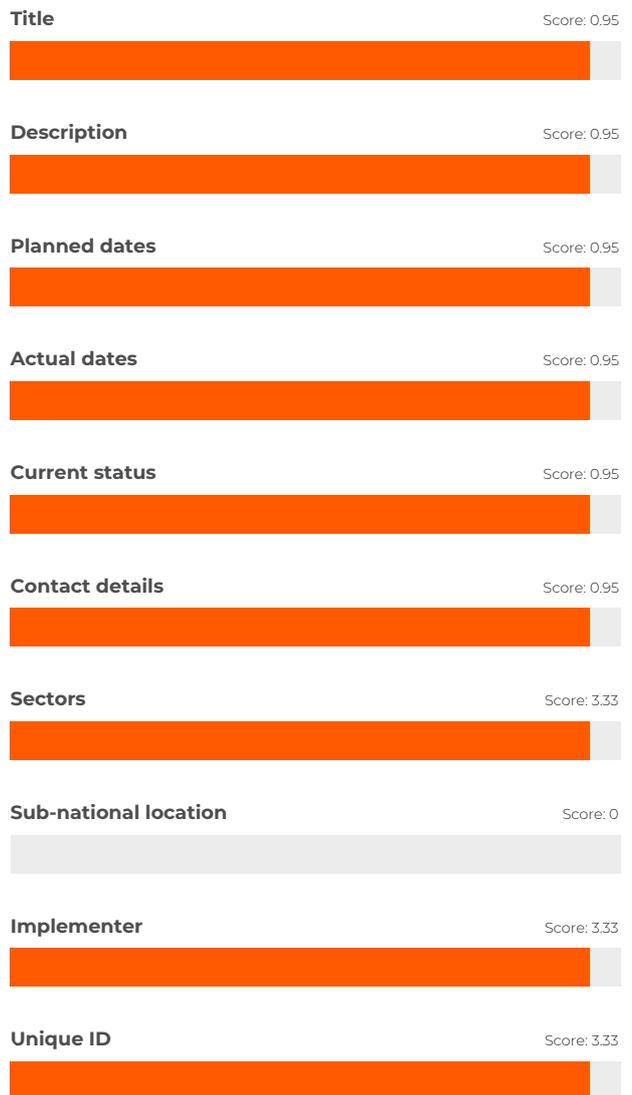
Total organisation budget — Score: 3.47

Project attributes

Score: 15.7 / 20

ABOUT COMPONENT

This component refers to descriptive, non-financial data, including basics like the title and description of a project. Information like this is important as it is often the entry point for data users to quickly understand what a project is about. We also look for other information that helps to put a project in context, such as its sub-national location (rather than simply being pin pointed to a capital city or the centre of a country) or the sector that the project deals with, for example, education or agriculture.

Title — Score: 0.95

Description — Score: 0.95

Planned dates — Score: 0.95

Actual dates — Score: 0.95

Current status — Score: 0.95

Contact details — Score: 0.95

Sectors — Score: 3.33

Sub-national location — Score: 0

Implementer — Score: 3.33

Unique ID — Score: 3.33

Joining-up development data

Score: 12.7 / 20

Flow type — Score: 3.17

This component looks at how well a donor's data is able to be linked and connected with other bits of information. There is a diverse nature of flows, activities and actors within the development sector. Aid and development finance data needs to be effectively linked and connected with the rest to provide a full picture for the user. This can be particularly important for partner country governments, who need to integrate information on aid with their own budgets and systems.
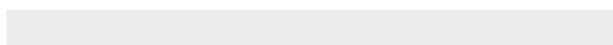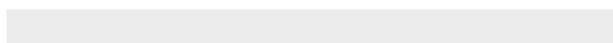
Aid type — Score: 3.17

Finance type — Score: 3.17

Tied aid status — Score: 3.17

Conditions — Score: 0

**Project procurement** — Score: 0

Performance

Score: 2.5 / 20

ABOUT COMPONENT

This component refers to the essential data and documents that assess whether a project is on track or has been achieved. This includes things like baseline surveys, progress against targets, mid-term reviews and end of project evaluations. This information is important to hold donors to account and also to share knowledge with others on what worked and what did not during a project.

Objectives — Score: 2.5

Pre-project impact appraisals — Score: 0
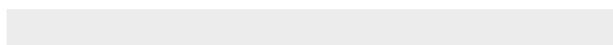
Reviews and evaluations — Score: 0

Results — Score: 0