



The
ATLANTIC
Philanthropies

2005 ANNUAL REPORT

Bringing
Lasting Change



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THE ATLANTIC PHILANTHROPIES

Bringing Lasting Change

The Atlantic Philanthropies are dedicated to bringing about lasting changes in the lives of disadvantaged and vulnerable people. This mission underlies every investment. We focus on four critical social issues: Ageing, Disadvantaged Children & Youth, Population Health and Reconciliation & Human Rights. At year-end 2005, Atlantic had awarded \$3.5 billion since its inception in 1982 and had approximately \$3.9 billion of funds in its endowment.

Atlantic is a limited-life foundation committed to spending its endowment before 2020 and completing active grantmaking by approximately 2016. The self-imposed expiration date is in keeping with the *giving while living* philosophy of our founder, Charles F. Feeney, who believes that a foundation which provides large sums over a shorter period of time has a better chance of impacting critical social problems.

The target geographic regions for programmes funded by Atlantic are Australia, Bermuda, Northern Ireland, the Republic of Ireland, South Africa, the United States and Viet Nam. These regions are where we can make the most significant impact in our chosen focus areas during the next decade.

The Atlantic Philanthropies comprise The Atlantic Foundation and The Atlantic Trust, both based in Bermuda; several smaller philanthropies, based principally in the United States and Great Britain; and regional service companies that select and evaluate potential grant recipients, and oversee grants once awarded.

To learn more, please visit www.atlanticphilanthropies.org.

The Year in Review

The Atlantic Philanthropies have made substantial progress toward our mission to bring about lasting changes in the lives of disadvantaged and vulnerable people. We are honoured to provide support for our grantees and all the people that they serve so well. In 2005, we made approximately 200 grants totaling \$289 million. For the second year, we focused our grantmaking on four programmes: Ageing, Disadvantaged Children & Youth, Population Health and Reconciliation & Human Rights. We concentrate our giving in seven geographic locations: Australia, Bermuda, Northern Ireland, the Republic of Ireland, South Africa, the United States and Viet Nam.

It is my firm belief that Atlantic is now well-positioned to achieve our goal of making significant, measurable impact in our programme fields and to demonstrate the value and importance of *giving while living*.

Giving while living is a philosophy long espoused by Atlantic's founder, Chuck Feeney. He believes a foundation that awards large amounts of money more quickly has a better chance of leaving its mark than a foundation that spends at a slower rate over a longer period of time. In 2002, our Board decided to position Atlantic for maximum impact during our remaining time as a limited-life philanthropy and to spend down the organisation's endowment by no later than 2020.

This decision has had a profound impact on everything that has happened within Atlantic subsequently. Becoming a limited-life foundation was the genesis of our current philanthropic philosophy, which includes these key features:

- Clearly articulated mission
- Tight focus within four programmes with specific objectives
- Narrow geographic spread
- Intensive due diligence prior to making big, bold grants
- Support for advocacy
- Rigorous evaluation
- Creation and broad dissemination of this knowledge, in collaboration with our grantees.

Our new direction has resulted in Atlantic becoming somewhat different from its peers in the foundation world. Obviously, the most striking difference is Atlantic's decision to spend down its assets and complete active grantmaking by 2016, ceasing operations shortly thereafter.



Atlantic is different in four other key respects. We give:

A small number of large grants: In 2005, we awarded 200 grants at an average of \$1.5 million per grant, versus more than triple that number of on-average smaller grants given by other foundations our size.

Support for core operational costs: We are enthusiastic about contributing to core costs, and awarded 51 grants worth \$87 million for such purposes in 2005.

Grants for advocacy: We strongly believe that we must assist our grantees in advocating for policy change, and in 2005, we awarded 51 grants worth \$69 million toward such efforts.

Multi-year grants: In 2005, 41 per cent of our grants covered more than two years. They accounted for \$186 million, or 64 per cent, of the total awarded.

While Atlantic is well-positioned to make significant impact for the disadvantaged and vulnerable, we face some challenges:

- We have committed to a robust system of evaluation of our grants to see how they measure up against tight objectives set jointly by our staff and the grantees. But we are only beginning the hard part—the collection and analysis of data which will tell us whether we and our grantees are achieving our shared objectives. These answers may not always be palatable.
- We are dedicated to achieving a clearly articulated mission and to measuring progress toward our objectives. The danger is that, in our focus on achieving our goals, we could exercise inappropriate power over grantees. We must always respect our grantees' independence, and we must remind ourselves that it is through their good work that we will reach our goals.

- We have started the process of explaining ourselves more clearly to our grantees and others interested in our work. But it will not be possible to demonstrate the value and importance of *giving while living* unless we communicate effectively, proactively and broadly what we are doing and how we are progressing.

Our staff has risen to many challenges over the past four years as we have refocused and set the direction so our work will impact disadvantaged and vulnerable people well beyond the life of this organisation.

In mid-May 2006, we announced my decision to extend my original five-year agreement for an additional year before stepping down as CEO in September 2007 to return to my home country, Ireland. The search for my successor is underway, so there will be plenty of time for us to ensure a seamless transition.

I feel that 2007 is a good time for me to step down as CEO because our mission and course of action, including spend-down timetable, are solidly established and our organisational transition is substantially complete. We have great strategies in place supported by great people, led by our strong, experienced senior management team of Deborah Phillips in New York and Colin McCrea in Dublin.

Over the next 15 months, I will focus on supporting our grantmaking and embedding the changes we have all worked on so hard for four years. I look forward to making progress on these remaining challenges and achieving a smooth transition to my successor.

John R. Healy, *Chief Executive Officer and President*
26 May 2006

2005 International Presence

Australia

GRANT TOTAL: \$38.3 million

PERCENTAGE OF TOTAL

GRANT FUNDS AWARDED: 13%

FOCUS AREA: Population Health

Bermuda

GRANT TOTAL: \$1.4 million

PERCENTAGE OF TOTAL

GRANT FUNDS AWARDED: 1%

FOCUS AREAS: Ageing,
Disadvantaged Children & Youth

Northern Ireland

GRANT TOTAL: \$16.5 million

PERCENTAGE OF TOTAL

GRANT FUNDS AWARDED: 6%

FOCUS AREAS: Ageing,
Disadvantaged Children & Youth,
Reconciliation & Human Rights

Republic of Ireland

GRANT TOTAL: \$33.1 million

PERCENTAGE OF TOTAL

GRANT FUNDS AWARDED: 11%

FOCUS AREAS: Ageing,
Disadvantaged Children & Youth,
Reconciliation & Human Rights



UNDERSTANDING OUR IMPACT

Strategic Learning & Evaluation

At Atlantic, our goal of creating sustainable change involves both grantmaking and our strategic learning and evaluation of this work. Due to our limited life, we invest resources in gathering the lessons of the work we fund so that we can have a lasting impact.

Four objectives guide our evaluation work:

- Our grantees and the wider philanthropic field will improve how they seek to achieve social change and increase their impact.
- We will share lessons on effective models of organisational growth and advocacy.
- We will be more effective in grantmaking and selecting priority areas.
- We will record Atlantic's approach in a credible way.

Our Strategic Learning & Evaluation (SLAE) Team helps map out realistic grant objectives and build useful evaluation plans. In 2005, SLAE provided support to the programme teams on over 100 projects, primarily on larger, strategic grants. To further specific SLAE work, we also made two grants to the Irish Hospice Foundation (\$156,000) and Columbia University (\$1.1 million).

CLUSTER EVALUATION APPROACH

Increasingly, we are focusing our efforts on groups or clusters of grants that are working toward shared objectives, e.g. developing civic engagement among older adults in the U.S., testing the efficacy of early childhood interventions in the Republic of Ireland and Northern Ireland, improving provincial health models in Viet Nam, and helping farm workers and the rural poor in South Africa to access their rights. These evaluations will assess the extent to which grantees are making progress, with our support, toward their goals. This work began in 2005, and we plan to roll out 20 cluster evaluations across all programmes and countries by the end of 2006.

EXAMPLE OF CLUSTER EVALUATIONS

In Ireland, SLAE has commissioned a cluster evaluation of grants that pilot methods to prevent poor educational and health outcomes among disadvantaged children. The programme focuses on demonstrating what works in early childhood interventions. Nobel Laureate James Heckman, the Henry Schultz Distinguished Service Professor in Economics and Public Policy at the University

In 2005, The Atlantic Philanthropies awarded approximately 200 grants totaling \$288.9 million. Below is a snapshot of Atlantic's grantmaking by country.

South Africa

GRANT TOTAL: \$23.2 million
PERCENTAGE OF TOTAL
GRANT FUNDS AWARDED: 8%
FOCUS AREAS: Population Health, Reconciliation & Human Rights



United States

GRANT TOTAL: \$125.8 million
PERCENTAGE OF TOTAL
GRANT FUNDS AWARDED: 43%
FOCUS AREAS: Ageing, Disadvantaged Children & Youth, Reconciliation & Human Rights



Viet Nam

GRANT TOTAL: \$42.6 million
PERCENTAGE OF TOTAL
GRANT FUNDS AWARDED: 15%
FOCUS AREAS: Population Health, Higher Education



Other

GRANT TOTAL: \$8 million
PERCENTAGE OF TOTAL
GRANT FUNDS AWARDED: 3%
FOCUS AREA: Population Health



of Chicago and Professor of Science and Society at University College Dublin, will head a cluster evaluation of these interventions. He and his research team, based at the Geary Institute at University College Dublin, will synthesise the lessons learned from individual project evaluations and will ensure that the findings are both policy relevant and credible. Professor Heckman will feed this work into an international consortium of researchers who will help interpret findings.

This evaluation will provide:

- Grantees with feedback on effective methods of intervention
- Policy makers with lessons to help inform public policy decisions
- Atlantic with feedback on the effectiveness of the supported interventions to help us maximise our impact
- The field with credible lessons of international scope, showing what does and does not work in the early childhood arena.

LESSONS FROM ATLANTIC'S APPROACH

We engaged the McKinsey Group in late 2005 to gather the lessons from our strategic change process over the last four years and to develop a case study that will record this important phase of Atlantic's life. The consultants have recorded the key strategic lessons from exiting our previous programme areas, designing our new programme areas, restructuring the organisation and deciding to spend-down our endowment prior to 2020. They will be published and disseminated widely.

As we spend down, recording the Atlantic lessons—both positive and negative—will provide solid information for other foundations and future philanthropists considering a similar path.

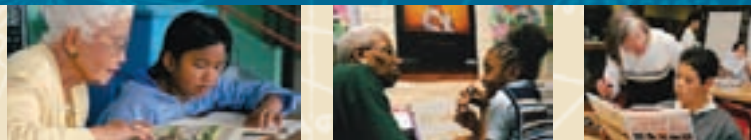


OVERVIEW

To provide service after retirement, older adults from the Experience Corps® tutor children in U.S. urban public schools in reading and math.

Region	No. of Grants	Total in Millions
Bermuda	2	\$ 0.5
Northern Ireland	10	\$ 6.0
Republic of Ireland	10	\$ 14.6
United States	20	\$40.4
TOTAL	42	\$61.5

BRINGING LASTING CHANGE TO



All photos by Alex Harris ©

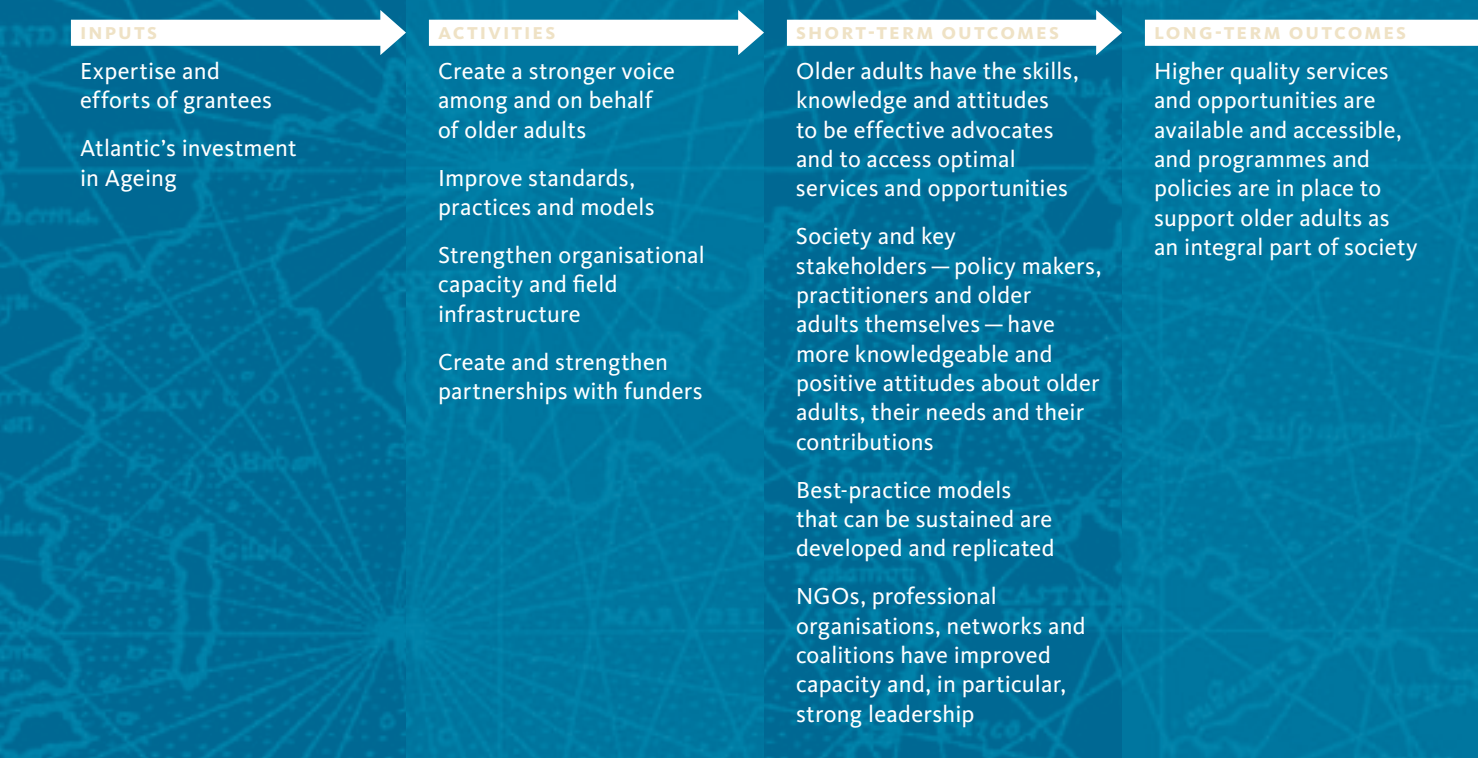
Ageing

In all four regions in which we operate, the Ageing Programme seeks to bring about lasting change in the lives of older adults, with a special emphasis on those who are disadvantaged and vulnerable because of ageism, poverty or poor health. We aim to help transform society's views of ageing and improve the treatment of older persons. Our programme respects the cultural integrity of each jurisdiction by recognising that the demographic, historical, cultural and economic context is different in each country.

While we have distinct programme objectives for each jurisdiction, our overall aims include ensuring that older adults are treated with dignity and respect, are fully empowered to shape their own destinies, have excellent health and support systems, have representation by a strong cadre of leaders, and are able to contribute their expertise, wisdom and abilities to society.

In order to achieve these objectives, we support interventions to create a stronger voice among and on behalf of older adults; improve standards, practices and models in the ageing field; strengthen organisational capacity and field infrastructure; and create and strengthen partnerships with other funders.

THEORY OF CHANGE: AGEING



IMPLEMENTING THE THEORY OF CHANGE TO ACHIEVE OUR GOALS

In 2005, our investments through the Ageing Programme virtually doubled, to \$61.5 million from \$33.2 million the previous year. Investments varied by country. For example, in Ireland and Northern Ireland, we support the creation of a stronger voice among and for older adults. In the United States, where strong advocacy organisations, including AARP, exist, we emphasise improving standards, practices and models.

Based on our Theory of Change, we plan to:

1. Create a stronger voice among and on behalf of older adults

- Invest in evidence-based policy development
- Enhance leadership capacity
- Engage in strategic advocacy work and promotion of older people's rights
- Develop communications campaigns.

The expected outcomes are that older adults and their organisations will be more effective advocates, empowering them to be proactive, valued members of society; having accessible, quality services and benefits for older adults who need them; and developing evidence-based policy. The following example illustrates this effort:

In the United States, the **National Council on Aging (NCOA)** undertook applied research that shaped part of the new Medicare prescription drug benefit implementation with our \$545,000 grant in 2004.

In partnership with The Bridgespan Group, the National Council on Aging examined 25 methods for outreach to older adults and

found great diversity in cost and effectiveness. From the research, NCOA recommended cost-effective outreach, which they shared with the Centers for Medicare and Medicaid Services (CMS) of the U.S. Department of Health and Human Services. CMS adopted them, as well as NCOA's BenefitsCheckUp Internet-based benefit take-up tool, as core elements of its outreach to low-income older adults for the new prescription drug benefit.

2. Improve standards, practices and models

- Establish evidence-based ways to engage and care for older adults in the health system and community settings
- Support research to establish standards on policy and practice
- Establish centres of excellence
- Develop and test models and support best-practice projects
- Train health professionals, family caregivers and older adults
- Fund communications and messaging campaigns.

The following examples demonstrate this effort:

Grants totalling \$7.7 million for the **Beeson Scholars programme** of the **American Federation for Aging Research** are creating a key group of physician scientists and leaders. To date, 115 Beeson Scholars have received funding from several foundations and the National Institute on Aging, and ten Scholars will receive support for three-to-five years early in their postgraduate development to anchor their careers in ageing. Beeson Scholars received research funding, publication in peer-reviewed journals and promotions. Earlier Scholars have leadership positions in the field, but the true value will be Scholars' leadership in future decades.

A \$1.8 million grant enables the **National University of Ireland, Galway** to host the Irish Centre for Social Gerontology, which studies the non-medical aspects of ageing. The Centre conducts research on social, economic, transportation and quality-of-life issues; trains Ph.D. students; and evaluates the Irish NGO sector.

3. Strengthen organisational capacity and field infrastructure

- Build collaborations among key stakeholders in ageing
- Strengthen the capacity of NGOs by developing appropriate physical and organisational infrastructure
- Leverage resources and secure funds to ensure the sustainability of key organisations, coalitions and networks
- Develop ageing field and senior services leadership development programmes
- Host and support meetings of key stakeholders, conferences and other forms of knowledge-sharing.

This example illustrates our support:

The **Bermuda Red Cross** organised a U.S. study tour of key NGO leaders in Bermuda and Ireland, as the result of our \$30,000 grant. The group visited a model transportation programme for older adults in Portland, ME, and agencies in Boston that are models of collaboration among diverse organisations and service provision to older adults. Follow-up is underway in Bermuda and Ireland regarding replication of the transportation programme.

4. Create and strengthen partnerships with funders

We collaborate with foundations, governments and corporations, including the Irish Department of Health, which matched our \$3.6 million grant to the **Trinity Foundation** for the Centre of Expertise in Geriatrics at St. James' Hospital and Trinity College Dublin. We hope to expand this partnership for the next phases of the Centre's development.

STRATEGIC OBJECTIVES

Bermuda

Although small in population, Bermuda will experience a dramatic growth in its ageing population in coming years. According to the U.S. Census Bureau, Bermudians 65+ will increase 130 per cent by 2025, to 16,500 from 7,200 persons today. The country is ill-equipped to meet the demands of this rapidly growing population.

The cost of living is also prohibitive for many older adults. Bermuda's success as an international business centre has resulted in a high cost of living, unanticipated by many seniors and service providers. Many older adults are struggling financially and physically to remain as independent as possible and live at home.

Fordham University researchers conducted a needs assessment study of older Bermudians that has resulted in an integrated programme with specific objectives and interventions.

In 2005, our \$530,000 in grants supported our three objectives.

Objective 1: Improved access to services By 2010, there will be increased awareness about available services through improved information systems with better outreach and higher quality information disseminated about services. Specific issues identified as key access barriers, such as transportation, will be addressed to increase service utilisation.

Progress and Learning to Date

Atlantic's grant to the **Bermuda Red Cross** for \$30,000 set the stage for future work. The Red Cross organised and hosted a U.S. study tour of leaders from key NGOs in Bermuda and Ireland. They visited a model transportation programme for older adults in Portland, ME, and follow-up discussions are underway regarding its replication in Bermuda.

Objective 2: Improved service capacity through human capital development

By 2010, there will be increased capacity of health care professionals, social workers and caregivers treating older adults. A specific priority health issue, such as dementia care, will have been improved through the development of training and education models that could then be applied to other health issues.

Progress and Learning to Date

Although we made no grants in 2005 in this area, Atlantic engaged Dr. Gary Kennedy, a geriatric psychiatrist at the Montefiore Medical Center in New York City, for consulting concerning mental health issues of older adults in Bermuda.

Objective 3: Strengthened ageing NGO sector with enhanced advocacy capacity

By 2010, the ageing sector in Bermuda will have stronger leadership and at least three organisations will have been strengthened in their capacity to advocate for older adults and these organisations will be operating in a coordinated fashion.

Progress and Learning to Date

We made one grant of \$500,000 to **Age Concern Bermuda** to increase the organisation's capacity for facilitating information sharing and collaboration. For example, Age Concern signed a memorandum of understanding to promote a closer working relationship and shared vision with the National Office for Seniors, Bermuda's government agency that monitors and advocates for older adults. They also plan to eliminate duplications.

In another sector-strengthening activity, Bermudian stakeholders, including representatives from the private, public and charitable sectors, met to consider forming a coalition focused on issues of older adults. The group suggested potential next steps for planning and implementing the recommendations of the Atlantic-funded Fordham University report: *Ageing in Bermuda: Meeting the Needs of Seniors*. News of the retreat generated considerable media attention and anticipation for future ageing-sector collaboration.



GRANTEE PROFILE

PROJECT
Benefit Take-Up Initiative

REGION SERVED
Northern Ireland

GRANTEE 1
The Interactive Aging Network (IANet)

AMOUNT AWARDED
\$572,000

YEAR AWARDED
2005

DURATION
12 Months (31 March 2005 to 30 March 2006)

GRANTEE 2
Northern Ireland Council for Voluntary Action (NICVA)

AMOUNT AWARDED
£500,000

YEAR AWARDED
2005

DURATION
18 Months
(30 June 2005 to 30 December 2006)

Northern Ireland

Northern Ireland (NI) and its 1.7 million people comprise the oldest population profile in Atlantic's Ageing Programme. The population aged 65+ is expected to double to nearly 27 per cent by the year 2035 from 13.5 per cent today. As in the rest of the UK, the administration of health and social services, housing and transport is a devolved function (fiscal policy, benefits, pensions and equality issues are reserved to Westminster). Unlike Great Britain or Ireland, Northern Ireland integrates its health and social services and could offer lessons for dissemination to other countries. This structure provides opportunities for collaboration and mutual learning between Northern Ireland and Ireland.

As people age in Northern Ireland, they face increased marginalisation, economic insecurity and loss of dignity. For many, negative physical and psychological outcomes are likely. Society is losing the potential contributions of older people. Root causes include ageism, inadequate government action, limited infrastructure, inadequate voice for older adults and failure by older people to claim entitlement to many social benefits.

Our Ageing Programme supports efforts to achieve the following societal changes: higher quality services are accessible for older adults, government policies and programmes ensure equal access to services and benefits, and older adults are more empowered and engaged in community life. Through this work, we support initiatives that recognise the importance of **collaboration** and **best practice**. Grantees' work reflects these themes:

- Collaborative and mutual learning, capitalising on All-Ireland opportunities
- Partnerships and collaborative approaches to service delivery
- Convening NGOs, thought leaders, key stakeholders and older people, and creating networks among NGOs, community-based groups and policy makers around older people as assets
- Broad communication of programme outcomes

- Research and policy development, and introduction of international best practice so that best-practice programmes become normal practices.

To ensure that the organisations sustain their work on behalf of older adults, we specifically focus on **building capacity** among NGOs and other organisations to represent older people's interests.

In 2005, we provided grants totalling \$6.0 million for our three objectives for the Northern Ireland Programme.

Objective 1: Strengthen the voice of older adults to improve attitudes and policy

By 2010, a comprehensive advocacy effort will be in place, including media-based approaches, older adults who are active participants, and advocates and advocacy organisations that are working together in a more collaborative way. This will have led to measurable improvement in the attitudes about ageing among key stakeholders and the public and to more empowered older people.

Progress and Learning to Date

We made four grants totalling \$4.0 million to support an innovative collaboration to improve advocacy efforts on behalf of older people. **Queen's University Belfast** (\$1.4 million) provides the evidence background for advocacy. **Workers' Educational Association** (\$815,670) is developing a framework for older people and supporting groups' learning and skills in advocacy. **Age Concern NI** (\$912,496) is establishing age-awareness forums for employers to address discrimination. **Help the Aged** (\$912,496) is developing outreach so older people's groups work together on common issues.

Objective 2: Support the creation of effective models of services for older people

By 2010, best-practice models for benefit take-up and dementia care will be sustainable and ready for replication. In addition, a stronger evidence base will be available to inform and prioritise strategic practice and policy initiatives.

INCREASING USE OF BENEFITS PROGRAMMES

In Northern Ireland, 40 per cent of households rely on government Pension Credit benefits as their main source of income. Yet as many as 35 per cent of older adults eligible for these benefits are not claiming them.

PURPOSE AND IMPACT OF THE GRANTS

We awarded grants to two NGOs — the Interactive Aging Network (IANet) and the Northern Ireland Council for Voluntary Action (NICVA) — to develop a collaborative initiative that will increase the number of eligible older people who claim their social welfare benefits. They are developing a Web-based tool inspired by a U.S. model created by NCOA with Atlantic funding. Through this initiative, the grantees hope to achieve a 3 per cent increase in benefit enrolment during the first year, and increase collaboration among NGOs and government agencies.

The initial feasibility study is being undertaken by four NGOs — Age Concern Northern Ireland, Help the Aged, Advice Northern Ireland and the Northern Ireland Citizens' Advice Bureaux. At the end of this phase, if a sustainable plan can be developed, the six organisations will collaborate on a national benefit take-up initiative, "Access to Benefits for Older People," aimed at helping more older people enrol for social benefits with a potential initial value of up to \$7.3 million.

Each participating NGO is assuming a role that suits its individual strengths. Help the Aged is in charge of outreach. Advice Northern Ireland is taking charge of training. The Northern Ireland Citizens' Advice Bureaux is taking the lead on technology. Age Concern Northern Ireland is responsible for content and data management.

The organisations hope to develop a coordinated programme integrating outreach, training and technology that not only increases benefit enrolment, but provides a model framework that can be used with other underserved populations.

Progress and Learning to Date

We made three grants totalling \$1.5 million in support of creating effective service models. Two grants are establishing the feasibility of scaling up a benefit take-up campaign; and early stages of the feasibility process, though complex and difficult, are promising. **The Interactive Aging Network** (\$572,000) is managing the feasibility phase and sharing its software development experience gained in the United States. **Northern Ireland Council for Voluntary Action** (\$906,300) is supporting four other NGO partners — Help the Aged, Age Concern NI, Northern Ireland Citizens' Advice Bureaux and Advice NI — in the benefits take-up campaign.

Objective 3: Expand opportunities for active social and community engagement by older people By 2010, at least two models will be established that actively engage and empower older adults, and small community organisations will have greater capacity to provide opportunities that engage and/or empower. This will have led to increases in the number of older adults in targeted programmes who are engaged in their communities.

Progress and Learning to Date

We made two planning grants totalling \$227,991 for exploring the possibilities in this area. **Engage with Age** (\$156,553) is evaluating the effectiveness of a consortium of local statutory and voluntary organisations to empower older adults to address health and well-being issues. If effective, there will be replication opportunities. **Rural Community Network** (\$71,438) is examining initiatives aimed at improving the quality of life for rural older people.

Republic of Ireland

In Ireland, the census projections are for the 65+ population to increase from 11 per cent to 15 per cent by 2011 and 19 per cent by 2030, significant increases after many years of little change. Ageism is prevalent and services for older adults are often of poor quality with major gaps. The centralised system of government and the national health system make substantial change feasible.

The Ageing Programme in Ireland supports efforts that contribute to achieving the following societal changes:

- Older adults and their organisations will be effective advocates, empowering them to be proactive, valued members of society
- Higher quality services will be accessible, including end-of-life care
- Effective models of community living will exist that support older people's desires to age in their own communities and homes.

These strategies are of paramount importance: collaboration, partnerships, convening key stakeholders, communication, dissemination, research and development, and capacity building.

In 2005, we awarded \$14.6 million in grants in support of these three objectives for the Ireland Programme.

Objective 1: Strengthen the voice of older adults in order to improve attitudes, policy and practice By 2010, the capacity of at least four national organisations to represent the interests of older adults will be strengthened both individually and collectively. This will have led to measurable improvement in the perception of older adults amongst the public and the implementation of evidence-based policy recommendations regarding health and community care.

Progress and Learning to Date

Four grants totalling \$274,096 support this objective, including **Age and Opportunity** (\$72,390) — an NGO working across a broad range of areas from the arts to physical activity, from challenging ageism to promoting greater empowerment by older people. This NGO received a planning grant to produce a strategy and training and education work plan. It plans to develop a re-granting programme for capacity building of smaller organisations in the ageing field. **Age Action Ireland** (\$77,590) received a planning grant to develop a coherent, long-term plan to focus its work on advocacy. This NGO is one of the few national organisations that makes its voice heard by media and policy makers.



GRANTEE PROFILE

GRANTEE
Civic Ventures for
Experience Corps®

REGION SERVED
United States

PROJECT 1
Going to Scale

AMOUNT AWARDED
\$5.0 million

YEAR AWARDED
2002

DURATION
52 Months
(01 September 2002
to 31 December 2006)

PROJECT 2
Building the Field of
Service by Older Americans

AMOUNT AWARDED
\$6.0 million

YEAR AWARDED
2005

DURATION
36 Months
(31 May 2006
to 30 May 2009)

Objective 2: Help foster and improve access to high-quality health care and social services for older adults By 2010, there will be evidence established of effective ways to engage and care for older adults in the health system and in a community setting. Applied research of an international standard on policy and practice will be underway and a cadre of care workers and clinicians will be trained in best practice in centres focusing on gerontology. Effective models of community health and social care will be developed, piloted and evaluated.

Progress and Learning to Date

We made two grants totalling \$2.0 million in support of improving access to health care and social services. Our \$56,693 grant to **Dundalk Institute of Technology** supported a high-level group from many sectors in Ireland to visit model projects in Holland, Sweden and Finland, to expose them to both urban and rural models of care which may be adapted for Irish needs. The diverse participants will be able to influence the direction of policy and practice.

Our \$1.8 million grant to the **Galway University Foundation** supported development of the Irish Centre for Social Gerontology at the National University of Ireland, Galway. This Centre, the first of its kind in Ireland, serves as an academic centre studying the experiences of older people in rural and urban areas to inform national social policy and to collaborate with international centres and institutes dedicated to social ageing studies.

Objective 3: Improve health and community care services for end-of-life care By 2010, there will be evidence established of effective ways to care for older adults in the hospice and community settings and within the wider health care system towards the end of their lives. Applied research of an international standard on policy and practice will be completed and a cadre of multi-disciplinary care workers and clinicians will be trained in best practice in centres focusing on end-of-life care.

Progress and Learning to Date

Four grants totalling \$12.4 million support improving end-of-life care. **St. Patrick's Hospital, Cork** (\$11.8 million) received the programme's largest 2005 grant to relocate and build a prototype hospice in a greenfield site. Marymount Hospice, founded in 1870 and now part of St. Patrick's, serves over 500,000 with a bed capacity of only 24. This new facility is a model for national and international replication for excellence in hospice service delivery; meets all national recommendations, including in-home care as a core service; and will serve as an important educational resource.

The Irish Hospice Foundation (IHF) received a \$296,456 planning grant to expand a two-year, single-site project, called *Care for People Dying in Hospitals*, into a national hospitals programme. This project is pioneering change in hospital culture with regard to dying, death and bereavement. IHF will develop a model to win support from the statutory, voluntary and philanthropic sectors.

United States

Older U.S. adults, 36 million strong, are living longer and healthier lives than their parents. By 2030, older adults will comprise 20 per cent of the population, doubling to 71.5 million. In 2002, persons aged 65+ had an average life expectancy of an additional 18.2 years.

Society can benefit enormously from the energy and wisdom of older citizens, but needs to update its structures and services for them. When society values the contributions of older persons, it will make progress on difficult problems and improve their sense of purpose.

Preserving the health and independence of older Americans and their active participation in society requires careful attention to prevention and treatment of illness from health professionals and older adults themselves. If they become frail, health and support services become urgent issues. Unfortunately, most health professionals receive little or no special training in geriatrics, and few health systems help them to provide excellent care.

The 2005 grants of \$40.4 million supported our three objectives.

HARNESSING THE ABILITIES OF OLDER ADULTS IN THE UNITED STATES

One of the most common prejudices against older adults in the United States is the belief that a majority of them are sick or disabled. The reality is that 85 per cent of older Americans are basically healthy, active and independent. If engaged more in their communities, the 36 million older adults in the United States could serve as a powerful force to address important social issues.

PURPOSE AND IMPACT OF THE GRANTS

Experience Corps matches groups of older adults with public schools in order to help at-risk children in the first to third grades improve their reading skills. Currently active in 14 United States cities, more than 2,000 corps members serve as tutors and mentors to children in urban public schools and after-school programmes, where they help teach children to read and develop the confidence and skills to succeed in school and in life.

Their commitment is a serious one. Most serve 10–15 hours each week. All commit to a regular schedule each school year.

The contribution of the Experience Corps volunteers' time and talents has been found to boost student academic performance, help schools and youth-serving organisations become more successful, strengthen ties between the schools and surrounding neighbourhoods, and enhance the well-being of the older volunteers in the process.

Objective 1: Improving health and social services through a strategy of human capital development

Objective 1a By 2009, health care practice for older adults will have been improved by increasing the supply and improving the quality of education and training efforts for key professionals, including physicians, nurses and social workers.

Progress and Learning to Date

Six grants totalling \$12.8 million provide training for professionals, redesign their work to overcome barriers to quality health care, and support the human capital infrastructure of researchers and thought leaders needed to improve care. One example is **The American College of Physicians** (\$2.0 million) — the organisation of primary-care internists who serve older adults — which is testing an approach to improve care of geriatric conditions such as falls, diabetes and hypertension that heavily impact older disadvantaged minority adults. Physicians receive updated clinical guidelines and help to redesign their practices to improve treatment for older adults.

Objective 1b By 2009, the quality of geriatric care provided by direct care workers in home and institutional settings will have been improved in three states.

Progress and Learning to Date

We made no new grants in this area. Two efforts — the capacity-development challenge grant to the Paraprofessional Healthcare Institute and the partnership with the Robert Wood Johnson Foundation on Better Jobs/Better Care — are progressing well.

Objective 1c By 2009, older adults and their families will be better able to assume an empowered role as members of their own health care team, armed with the knowledge needed to effectively interact with the other team members and to self-manage, to the extent desired, their own health care.

Progress and Learning to Date

We made no 2005 grants, but we researched potential investments.

Objective 2: Increasing opportunities for meaningful civic engagement for older adults

Objective 2a By 2009, the number, visibility, diversity and range of opportunities for volunteerism, employment and lifelong learning for older adults will have been expanded.

Progress and Learning to Date

Ten grants totalling \$17.9 million support civic engagement, including the **American Health Initiative** (\$2.3 million), which links retired health professionals to the uninsured through service in free clinics. Staff members are developing the Screen & Match System to test in Virginia and North Carolina. It will roll out in eight more states, covering 136 free clinics. The **Leadership Network** (\$980,000) started its first “Leadership Community” with church leaders to help older congregation members transition from employment to helping the disadvantaged.

Objective 2b By 2009, the consumer education/information infrastructure for older adults with regard to basic needs for income and living supports will have been supported and developed.

Progress and Learning to Date

A \$7.9 million grant enabled the **National Council on Aging** to apply results from a study with an Internet-based enrolment tool, BenefitsCheckUp. The goal was to increase the number of low-income elderly who enrol in the Medicare Part D drug benefit, and to strengthen NCOA's infrastructure for future benefit enrolments.

Objective 3: Building the basic architecture of the field By 2009, Atlantic will leverage its contributions on behalf of older adults by strengthening the capacity of other organisations committed to improving the lives of older adults.

Progress and Learning to Date

A \$960,000 grant to **The Bridgespan Group** enabled it to assist key ageing organisations, including the American Geriatrics Society, Experience Corps and Civic Ventures, to develop business plans.

2005 Grantees

BERMUDA

Age Concern Bermuda

PURPOSE: To bring about lasting improvements in the lives of older adults by strengthening Age Concern Bermuda's capacity to facilitate information-sharing and collaboration in Bermuda.

AMOUNT: \$500,000

TERM: Three years

Bermuda Red Cross

PURPOSE: To increase awareness of transportation and civic engagement models for older adults by supporting an educational visit of key Bermudian and Irish NGO staff to the United States.

AMOUNT: \$30,000

TERM: One month

NORTHERN IRELAND

Age Concern Northern Ireland

First Grant

PURPOSE: To enable the two major NGOs for older people, Age Concern Northern Ireland and Help the Aged, to prepare a plan to collaborate more effectively to improve the quality of life for older people in Northern Ireland.

AMOUNT: £60,000

TERM: Seven months

Second Grant

PURPOSE: To improve advocacy efforts on behalf of the older population by establishing local and regional consultative forums and raising age awareness. Age Concern is collaborating with three other NGOs to increase overall advocacy effectiveness.

AMOUNT: £520,000

TERM: Five years

Engage with Age

PURPOSE: To evaluate as a model this consortium project to empower older adults to address health and well-being issues, by establishing potential criteria, costs and partners for replication.

AMOUNT: £85,000

TERM: Six months

Help the Aged Northern Ireland

PURPOSE: To improve advocacy efforts on behalf of the older population in Northern Ireland by community development approaches, better networking and communications. Help the Aged is collaborating with three other NGOs to increase overall advocacy effectiveness.

AMOUNT: £520,000

TERM: Five years

Institute for Public Health in Ireland

PURPOSE: To enable the Institute to commission a scoping review of ageing research and a development plan for a Centre for Ageing Research and Development in Northern Ireland and Ireland.

AMOUNT: €90,000

TERM: Six months

Northern Ireland Council for Voluntary Action

PURPOSE: To provide support for five NGOs in Northern Ireland to develop the mechanism and test the feasibility of a country-wide initiative to enrol vulnerable older adults in the benefits programmes to which they are entitled.

AMOUNT: £500,000

TERM: One year and six months

Queen's University Belfast

PURPOSE: To implement an integrated programme of advocacy on behalf of older people in Northern Ireland by providing a base of policy research and policy options to NGOs.

AMOUNT: £772,000

TERM: Five years and two months

Rural Community Network

PURPOSE: To examine, through an action research project, suitable initiatives aimed at improving the quality of life for rural older people.

AMOUNT: £41,000

TERM: One year

The Interactive Aging Network

PURPOSE: To support The Interactive Aging Network (IANet), which provides coordination, supervision and quality control for the benefits take-up campaign in Northern Ireland.

AMOUNT: \$572,000

TERM: One year

Workers' Educational Association

PURPOSE: To implement an integrated programme of advocacy on behalf of older people, by developing and implementing education and training programmes for NGOs and older persons in Northern Ireland.

AMOUNT: £450,000

TERM: Five years and two months

REPUBLIC OF IRELAND

Age Action Ireland

PURPOSE: To enable Age Action Ireland to contract a consultant to assist them in developing a plan to increase their organisational capacity.

AMOUNT: €60,000

TERM: Three months

Age and Opportunity

PURPOSE: To enable Age and Opportunity to carry out a strategic planning process by contracting a consultant.

AMOUNT: €60,000

TERM: Three months

Dundalk Institute of Technology

PURPOSE: To increase awareness of international models of community care serving older adults by supporting an educational visit of key ROI service providers and academics to a number of European best-practice care settings.

AMOUNT: €48,000

TERM: Three months

Galway University Foundation

PURPOSE: To improve the policy and practice affecting older adults by supporting the development of a national Centre for Social Gerontology in Ireland.

AMOUNT: €1,500,000

TERM: Five years

Irish Senior Citizens Parliament

PURPOSE: To enable Irish Senior Citizens Parliament to develop a strategic plan for strengthening its organisational capacity.

AMOUNT: €40,000

TERM: Three months

Milford Care Centre

First Grant

PURPOSE: To raise the standards of quality and safety in palliative care settings by supporting Milford Care Centre to achieve quality and safety accreditation and disseminate the learnings from getting the accreditation.

AMOUNT: €275,000

TERM: Two years

Second Grant

PURPOSE: To enable Milford Care Centre to carry out a planning process by employing a project manager.

AMOUNT: €26,000

TERM: Six months

St. Patrick's Hospital, Cork

PURPOSE: To improve the standard of palliative care services in the Republic of Ireland Health Service Executive southern region by supporting the construction of a new prototype hospice building.

AMOUNT: €10,000,000

TERM: Three years

The Irish Hospice Foundation

PURPOSE: To support the Irish Hospice Foundation to roll out the *Care for People Dying in Hospitals* project on a national basis. The project focuses on transforming all aspects of care as it relates to dying, death and bereavement.

AMOUNT: €251,000

TERM: One year

The Third Age Centre, Summerhill

PURPOSE: To enable the Senior Help Line, a national confidential listening service for older adults in Ireland, to carry out a strategic planning process by contracting a consultant.

AMOUNT: €60,000

TERM: Three months

UNITED STATES

Alliance for Children and Families

PURPOSE: To improve the geriatric knowledge of social workers in community-based agencies by planning the implementation of strategies to transform current practice.

AMOUNT: \$100,000

TERM: Ten months

American College of Physicians, Inc.

PURPOSE: To train general internists and their support staff in the United States to provide high-quality care to older persons.

AMOUNT: \$2,000,000

TERM: Three years

American Health Initiative, Ltd.

PURPOSE: To meet the critical needs of free clinics in the United States by engaging retired health professionals to care for the uninsured.

AMOUNT: \$2,275,000

TERM: Two years

Association of Subspecialty Professors

PURPOSE: To embed gerontology and geriatrics in the sub-specialties of internal medicine by supporting career development of 45 additional junior faculty leaders.

AMOUNT: \$4,500,000

TERM: Six years

Civic Ventures

PURPOSE: To maintain Experience Corps, a programme in which older adults serve as tutors and mentors to children in American urban public schools, by supporting core operations and infrastructure.

AMOUNT: \$6,000,000

TERM: Three years

Grantmakers in Aging

PURPOSE: To meet the long-term needs of older victims of the Gulf hurricanes in the United States, their caregivers and families by establishing a fund to collect and allocate resources through state and area agencies on ageing.

AMOUNT: \$250,000

TERM: One year

ImpactOnline, Inc.

PURPOSE: To enhance the quality of volunteering opportunities for older adults in the United States by planning an improved matching system using the Internet.

AMOUNT: \$375,000

TERM: Ten months

Leadership Network

PURPOSE: To increase older adults' civic engagement by developing and disseminating a recruitment method targeted to church leaders.

AMOUNT: \$980,000

TERM: Three years

National Governors Association Center

PURPOSE: To improve opportunities for older adults by working with state governors.

AMOUNT: \$1,220,000

TERM: Three years

New York University College of Nursing

PURPOSE: To improve the care of hospitalised older adults by planning to expand the capacity of a nursing-led quality improvement programme.

AMOUNT: \$309,000

TERM: Nine months

Pension Rights Center

PURPOSE: To increase the ability of older adults to secure retirement income by strengthening the capacity of the Pension Rights Center.

AMOUNT: \$1,000,000

TERM: One year and six months

The American Geriatrics Society

PURPOSE: To improve the health of older adults in the United States by increasing geriatric expertise across ten targeted specialties with 28 additional Jahnigen Career Development Scholars.

AMOUNT: \$5,300,000

TERM: Five years

The Bridgespan Group

PURPOSE: To enhance selected grantees' opportunity for success by developing business plans with the Bridgespan Group's assistance.

AMOUNT: \$960,000

TERM: One year and six months

The Conference Board

PURPOSE: To increase older adults' inclusion in the workplace by assessing the benefits and costs of older workers and then educating key employers.

AMOUNT: \$2,000,000

TERM: Three years

The National Council on Aging, Inc.

First Grant

PURPOSE: To meet the needs of older adults evacuated in response to the Gulf hurricanes by developing and deploying a modified version of BenefitsCheckUp, an online screening and enrolment service to access public benefits.

AMOUNT: \$500,000

TERM: One year

Second Grant

PURPOSE: To improve access to benefits for low-income older adults by demonstrating effective methods of enrolment in community-based settings.

AMOUNT: \$7,900,000

TERM: Three years

The New York Academy of Medicine

PURPOSE: To establish a Geriatric Social Work Public Policy Coordinating Center in the United States.

AMOUNT: \$625,000

TERM: One year and three months

Twin Cities Public Television, Inc.

PURPOSE: To change how society perceives older adults by producing a public television series and developing outreach activities.

AMOUNT: \$1,200,000

TERM: One year and four months

University of Minnesota

PURPOSE: To assist in the maturation of a unique model of elder-led civic engagement in Minnesota toward a nationally relevant model.

AMOUNT: \$650,000

TERM: Three years

Washington University in St. Louis

PURPOSE: To assess the benefits of the Experience Corps programme by conducting a multi-state evaluation.

AMOUNT: \$2,200,000

TERM: Three years



OVERVIEW

Children in The Family Centre programme enjoy a carefree summer afternoon.

Region	No. of Grants	Total in Millions
Bermuda	2	\$ 0.9
Northern Ireland	4	\$ 2.3
Republic of Ireland	8	\$ 4.7
United States	28	\$ 54.0
TOTAL	42	\$ 61.9

BRINGING LASTING CHANGE TO



Will Kirk



Edmund Ross



Edmund Ross

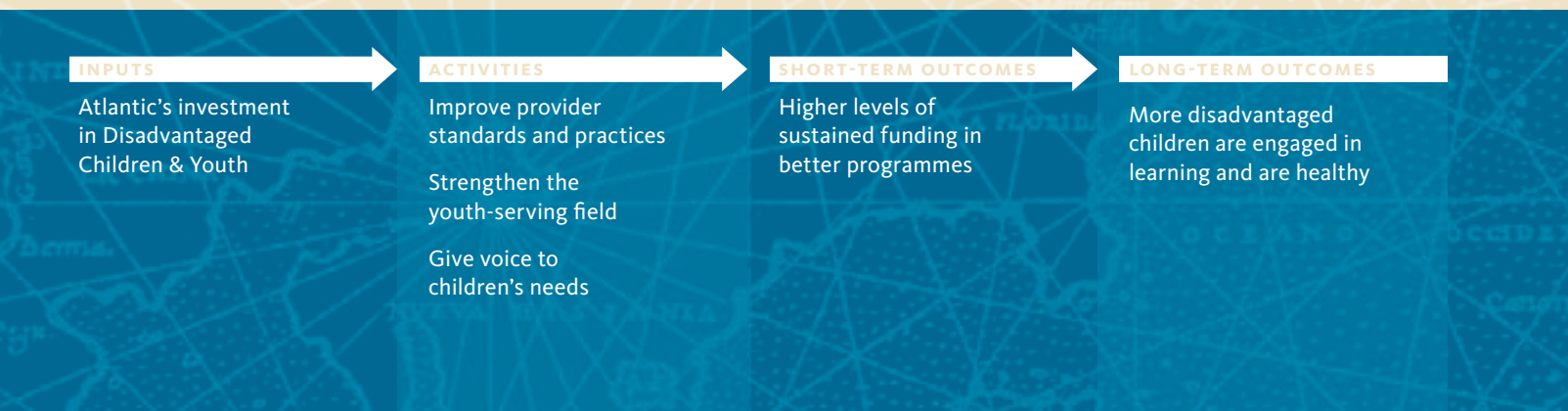
Disadvantaged Children & Youth

All children deserve the opportunity to fulfil their dreams, regardless of their economic circumstances. Based on this belief, we seek to make lasting changes in the lives of disadvantaged children and youth through preventive programmes in the United States, Ireland, Northern Ireland and Bermuda. While programme objectives differ somewhat by region, our consistent focus is on keeping disadvantaged children and youth engaged in learning, healthy and connected to key supports.

We invest in learning that prepares children for adulthood; comprehensive, preventive health care for adolescents; mentoring programmes that foster personal responsibility; and counsel that helps families understand and access benefits. In Northern Ireland and Ireland, we also invest in early-years education and care.

Our investments strengthen proven and promising programmes of national stature in each country. We also seek to demonstrate the combined impact of our investments in learning, health and connectivity programmes at the local level, in a limited number of places. United States target locations include the state of New Mexico; Oakland, CA; Chicago, IL; and Baltimore, MD. In Ireland, our investments focus on Ballymun, Tallaght West, Dublin–Northside and Lurgan (Northern Ireland).

THEORY OF CHANGE: DISADVANTAGED CHILDREN & YOUTH



IMPLEMENTING THE THEORY OF CHANGE TO ACHIEVE OUR GOALS

In 2005, the Disadvantaged Children & Youth (DCY) Programme investment more than doubled, to \$61.9 million from \$25.5 million in 2004. The grants mix varied by geography. In Ireland, we provided support to enhance provider standards and practices in the nascent youth sector. In the United States, where the sector is more developed but funding is tenuous, we supported advocacy to fight proposed cuts in services for children and families. We assess all grantees against quality and effectiveness criteria.

Wherever possible, our investments build on support from other foundations and, in some cases, governments. We also fill gaps where other funding is unlikely in the short term. Our funding enhances core capabilities through general operating support and evaluation of impact—two areas seldom funded by foundations. We place big bets and make longer-term grants that increase grantees' stability.

Based on our Theory of Change, we plan to:

1. Improve provider standards and practices

Our \$4.0 million grant supports comprehensive evaluation of **Communities In Schools** (CIS), which identifies the most disadvantaged students and connects them with mentors, tutors, social workers, out-of-school programmes and other supports. This high-leverage, low-cost model shows strong anecdotal evidence of impact. Our investment supports rigorous, longitudinal evaluation of CIS' overall approach across sites and school environments. It establishes operational benchmarks and identifies best practices for assessing student needs and connecting youth to needed resources.

2. Strengthen the field

We made a \$5.0 million investment in **America's Promise Alliance** (APA), which helps organisations that serve youth deliver on one or more of five promises: a healthy start, a safe place to learn and play, connection with a caring adult, effective education and opportunities to help others.

We are strengthening APA's capacity to develop leadership talent, enhance infrastructure, reinforce resources and launch awareness/advocacy campaigns. America's Promise members include Atlantic grantees: Communities In Schools, Big Brothers Big Sisters of America (BBBSA) and City Year.

3. Give voice to children's needs

We amplified the voice for children in Ireland by investing \$130,000 in the **Children's Rights Alliance** (CRA), a respected coalition of 79 NGOs committed to full implementation of the UN Convention on the Rights of the Child, adopted in 1992. The Convention requires the government to submit to the UN in 2006 a performance report on its stewardship of children, especially progress since the last review in 1998. Our grant enabled the Children's Rights Alliance to develop its own report on government performance, which will be part of the official UN review. Also, CRA will engage with government and UN officials to secure policy gains.

STRATEGIC OBJECTIVES

Bermuda

Social and racial divisions seem to be growing in Bermuda. Increases in youth violence and drug abuse indicate that they may be particularly affecting the island's youth. As a result of class segregation, public school students do not have easy access to the economic and social mobility and services that private school students do. According to the 2000 Census, only 67 per cent of Bermudian children earned a school-leaving certificate. Recent initiatives to fund youth programmes have found a lack of consensus on the best way to help disadvantaged children, which has led to duplications and service gaps.

Atlantic supports disadvantaged youth by engaging them in out-of-school activities and family-support programmes, and strengthening Bermuda's nonprofit sector by identifying needs and best practices. Addressing the gap in opportunities in segregated Bermuda can lead to improved youth decision-making and life outcomes.

We have established two objectives and made our first grants totalling \$850,000 in 2005.

Objective 1: Improve provider standards and practices

By 2010, there will be at least three organisations on the island that will have increased the quality and reach of programmes targeted at preventing disadvantage among children in one or more of the following focus areas:

- After-school programmes
- Child-focused preventive health care programmes
- Family-support programmes.

Progress and Learning to Date

We made two grants totalling \$850,000 in support of this objective. The first is **The Family Centre** (\$490,000), which offers evidence-based practices to help Bermudian families cope with potentially debilitating crises such as neglect and physical, drug and alcohol abuse. Our support helped the Centre raise other funds and provided core support for the Caring for Families Outreach Programme for primary-school-age children.

Open Airways (\$360,000) addresses preventive health care by expanding asthma education and treatment. Open Airways is working with officials to hire an asthma nurse to serve Bermuda's public primary school children.

Objective 2: Strengthen the field By 2010, gaps in youth services will be clearer and best practices will have been strengthened and disseminated by:

- Supporting efforts to “map” youth services
- Providing technical assistance to NGOs
- Building stronger ties among service providers and policy makers.

Progress and Learning to Date

Although we made no grants in 2005 in this area, we hired a consultant to create a comprehensive profile of the needs of Bermuda's youth and their use of services. She is identifying services and programmes from governmental and independent sources.

Northern Ireland

Services for children are reactive, often in response to critical, high-profile problems, with insufficient attention to longer-term prevention and early intervention. Rigorous evaluation remains rare in Northern Ireland.

We see hopeful signs that attitudes toward investing in children are beginning to change. Interest in evidence-based services is growing and the government recently announced substantial new investments in education and other children's services. We are negotiating with the government to get these funds deployed in support of evidence-based, outcome-focused preventive services.

Our 2005 investments of \$2.3 million supported our three strategic objectives.

Objective 1: Improve provider policies and practices

By 2010, there will be at least 12 promising programmes and three area sites targeted at preventing disadvantage among children in one or more of the following focus areas:

- Early intervention
- Comprehensive, child-focused, preventive health care programmes
- Mentoring and family support.

Progress and Learning to Date

We made three grants totalling just over \$1.5 million, including the **Belfast Door Project** (\$181,000), a consortium of ten leading youth-serving organisations, which is developing a plan to provide integrated services—health, education and personal development—for children and youth at a single site in central Belfast and create a model for Northern Ireland. Extensive evidence shows that integrating services, especially preventive services, improves outcomes, particularly for disadvantaged children.

Business in the Community Northern Ireland (BiC) is a \$1.0 million grant to provide high-quality early intervention programmes to help youth succeed in school and become economically productive adults. The cost-effective BiC programme brings corporate employees into schools as mentors. Preliminary evaluations have demonstrated the positive impact on students' confidence, self-esteem and essential reading and math skills. Our grant is enabling BiC to evaluate rigorously its programmes in 100 schools, with the potential of introducing the model in Ireland and elsewhere in the EU. Similar programmes exist in other countries, but none has received thorough evaluation or shown potential to grow to scale.

Objective 2: Strengthen the field By 2010, there will be as many as nine new or existing intermediary organisations assisting service providers and policy makers by:

- Improving practices and providing technical assistance
- Supporting research centres
- Building networks among service providers and policy makers.

Progress and Learning to Date

We did not make any grants in this area, but we conducted extensive research into investments for 2006.

Based on a 2004 grant, **Warren House Group** at Dartington generated monthly seminars, alternating between Dublin and Belfast, in 2005. These sessions brought together policy makers, practitioners and academics to discuss issues that affect disadvantaged children and youth, including the introduction of the SureStart early-years education programme in the UK, lessons from Communities That Care and teenage sexual health. This grant also supported a weeklong U.S. study tour for 25 practitioners and academics.

Objective 3: Give voice to children's needs By 2010, at least four existing advocacy organisations in the Republic and Northern Ireland will have strengthened their abilities to encourage private and public backing for effective prevention programmes and policies.



GRANTEE PROFILE

GRANTEE

The Shanty Educational Project (An Cosan)

PROJECT

Tallaght West Childhood Development Initiative

REGION SERVED

Republic of Ireland

GRANT 1

Ten-Year Plan Development

AMOUNT AWARDED

€390,000

YEAR AWARDED

2004

DURATION

19 Months
(31 May 2004 to
30 December 2005)

GRANT 2

Transition to
Implementation Phase

AMOUNT AWARDED

€191,000

YEAR AWARDED

2005

DURATION

15 Months
(01 January 2005 to
01 April 2006)

Progress and Learning to Date

We made one grant of \$850,000 in support of the **Children's Law Centre (CLC)**, a leading advocate, to ensure that disadvantaged children have access to their full rights through CHALKY (Children's Law Centre's Advice Line for Kids and Youth). The Children's Law Centre responds to all calls from children whose rights may have been denied. It gives special attention to cases that could effect significant change in the circumstances of a class of children. The CLC has a strong track record of winning priority cases and influencing government policy for juvenile justice.

Multi-Objective Work

Several grants promise to advance more than one objective.

Springwell Centre (\$271,000) is the fiduciary agent for a consortium of agencies working on a ten-year plan for innovative, preventive services for the children of our community engagement site in Lurgan, a small town near Belfast. This programme will provide a model for children's services throughout Northern Ireland.

Republic of Ireland

Services for children tend to be reactive, often due to critical, high-profile problems. There is insufficient attention to longer-term prevention and early intervention or evidence-based outcomes for children and families. Ireland is a signatory to the UN Declaration on the Rights of the Child and has a national children's strategy, but its implementation lags. Responsibility for children rests with several government departments that need to coordinate better among themselves and with NGOs.

Two encouraging signs are growth in interest of evidence-based services, and the government's announcement in December 2005 that it was establishing structures to improve coordination of children's policies.

We provided more than \$4.7 million in grants to support our three strategic objectives.

Objective 1: Improve provider policies and practices

By 2010, there will be at least 12 promising programmes and three area sites targeted at preventing disadvantage among children in one or more of the following focus areas:

- Early intervention
- Comprehensive child-focused preventive health care programmes
- Mentoring and family support.

Progress and Learning to Date

We approved five grants totalling \$4.0 million, including planning efforts by four NGOs that work directly with disadvantaged children and youth. Examples include the **Society of St. Vincent De Paul** (\$74,000), which serves battered women and their children, and the **Northside Partnership** (\$3.4 million), which evaluates early-years services for families, and developed blueprints for achieving change, including programme governance and evaluation.

Clondalkin Partnership — The Incredible Years Programme (\$31,000) is adopting a proven United States model for three- to nine-year-old Dublin children whose emotional or behavioural difficulties are resulting in poor school performance. Our funding supported the planning of a national pilot, including a randomised control trial to demonstrate impact. Such testing is rare in Ireland.

Objective 2: Strengthen the field By 2010, there will be as many as nine new or existing intermediary organisations assisting service providers and policy makers by:

- Improving practices and providing technical assistance
- Supporting research centres
- Building networks among service providers and policy makers.

USING LONG-TERM PLANNING TO FIX A LONG-TERM PROBLEM

The Dublin suburb of Tallaght West is on the Irish government's short list of socially and economically disadvantaged areas. Not surprisingly, services for children in this neighbourhood are limited and fragmented. Local preschools can accommodate only 300 of the 1,500 applicants. Policy and practice in Tallaght West, like most of Ireland, have not kept pace with international research that has established clearly the positive impact of early intervention on children's development.

PURPOSE AND IMPACT OF THE GRANTS

For 18 years, the nonprofit organisation called An Cosan has pioneered innovative childhood development and family-support services in Tallaght West and elsewhere in Ireland. A grant from Atlantic enabled An Cosan to develop a ten-year plan to provide comprehensive services for all the children of Tallaght West.

With Atlantic support, An Cosan convened a consortium of 20 leaders from local schools, agencies and other service providers committed to improving standards and practices, and integrating their services. The consortium launched a thorough planning process that included consultation with children and families, a community-wide needs assessment, an audit of local and national services, and an analysis of costs and benefits.

This process generated a plan to improve the lives of disadvantaged children in Tallaght West through a comprehensive early-years programme; after-school services; services that address specific problems, such as bullying; advocacy; and rigorous evaluation. The consortium has published the plan and is now seeking investment to enable implementation in 2006, including government funding for the first three years.

Progress and Learning to Date

We approved two grants totalling \$572,000 in this area. The first, **The Irish Youth Foundation** (\$260,000), is developing a new independent research agency for Ireland (and, hopefully, the whole island), similar to Child Trends (see page 23). This research will create a strong knowledge base for developing first-class services and policies. The new agency will collect, analyse and share information about children, including primary-school dropouts, investment per child and the outcomes from these funds.

Galway University Foundation (\$312,000) received an award to develop a ten-year plan to expand the scope and capacity of the Child and Family Research and Policy Unit. Its enhanced expertise in policy research, service design and programme evaluation will benefit the youth sector tremendously.

Objective 3: Give voice to children's needs By 2010, at least four existing advocacy organisations in the Republic and Northern Ireland will have strengthened their abilities to encourage private and public backing for effective prevention programmes and policies.

Progress and Learning to Date

We made a \$131,000 grant to the **Children's Rights Alliance** (CRA) to enhance advocacy on behalf of Irish children by supporting the production and dissemination of the Irish "Shadow Report" to coincide with the 2006 UN review of the Convention (see page 18).

Multi-Objective Work

Our \$231,000 grant to **The Shanty Educational Project (An Cosan)** addressed all three objectives in the development of a ten-year plan to provide services for all children in this disadvantaged Dublin suburb. The plan calls for a comprehensive early-years programme, including quality after-school programmes and services to address specific needs (e.g., bullying) as well as comprehensive evaluation and advocacy.

United States

The United States outlook for disadvantaged children and youth remains hopeful, despite challenges. In 2005, positive signs included:

- Increased funding and momentum among policy makers and the public for out-of-school programmes
- Extensive dialogue about the best ways to re-authorise the SCHIP (State Children's Health Insurance Program) safety net in 2007
- Well-managed efforts to fight the most draconian cuts to social welfare programmes.

Despite these positive signs, persistent challenges included significant funding cuts to many programmes supporting children and families and a highly fragmented youth field. This division hampers efforts to set and raise standards and to communicate effectively with the public and policy makers about what children need.

We remain mindful that:

- Very little investment, especially public dollars, supports prevention; most funding goes to remediation. Prisons are built, not schools. Remediation investments have not improved the 43 per cent graduation rate among African-American boys nor reduced alarmingly high levels of asthma and obesity, which have doubled and tripled respectively in recent decades.
- Few funders offer general operating support at sufficient levels for service providers to apply best practices and permanently raise their standards. Higher standards would materially improve outcomes and win more funding for the best programmes, helping to ensure their longevity.



GRANTEE PROFILE

GRANTEE	AMOUNT AWARDED
The Family Centre	\$490,000
PROJECT	YEAR AWARDED
Caring for Families/ Core Support	2005
REGION SERVED	DURATION
Bermuda	24 Months (31 August 2005 to 30 August 2007)

- Youth programmes are not well-integrated at the federal, state or local level. Five federal departments claim aspects of youth development; local governments mirror this diffusion. This results in tremendous redundancy with no effective means of comparing performance.

The 2005 investment of \$54.0 million supports our three United States strategic objectives.

Objective 1: Improve provider standards and practices

By 2010, there will be at least 15 provider organisations nationally that will have increased the quality and reach of programmes serving 8- to 16-year-old disadvantaged youth in one or more of the following focus areas:

- Full-day/full-year educational programmes, after-school, weekend and summer programmes;
- Comprehensive, child-focused preventive health care programmes
- Mentoring and selected family support services.

Progress and Learning to Date

We approved six grants totalling \$17.0 million to strengthen organisations that work directly with disadvantaged children and youth.

Big Brothers Big Sisters of America (\$3.5 million) began implementing its Agency Information Management (AIM) system in selected agencies. AIM will change the way Big Brothers Big Sisters does business, increasing focus on key metrics and highlighting needed performance improvements in real time. Early implementation results are promising, with match growth of mentors and children in AIM agencies exceeding growth in other BBBSA agencies.

U.S.-based **National Foundation for Teaching Entrepreneurship** (NFTE) (\$3.0 million) continued efforts to strengthen its operations and fund-raising capacity. NFTE also launched its first programme in Ireland, showing the wide applicability of school-based entrepreneurial education. The NGO targets children vulnerable to dropping out of school, offering them math and reading remediation in the guise of business planning.

Objective 2: Strengthen the field By 2010, at least ten intermediary organisations will have strengthened the youth-serving field in a limited number of locations, better informing policy and practices in at least one of three focus areas:

- Full-day/full-year educational programmes; after-school, weekend and summer programmes
- Comprehensive, child-focused preventive health care programmes
- Mentoring and selected family support services.

Progress and Learning to Date

We approved 11 grants totalling \$21.4 million to increase the capacity and sustainability of national intermediary organisations that help direct service providers' work better, promoting higher quality standards and practices, and fostering networking and coordination among organisations.

In the wake of hurricanes Katrina and Rita, the **America's Promise Alliance** (\$3.5 million), and its alliance partners, **Communities In Schools** and the United Way, paved the way for an historic convening of government, business and NGOs in Houston to address the critical educational and health needs of some 20,000 children relocated to Texas from New Orleans. The "Katrina's Kids" effort will provide quality summer programming for Houston's most vulnerable children to avoid educational loss and violence among restive youth. Similar efforts are expected in Mississippi and Louisiana.

MOVING FROM CRISIS INTERVENTION TO CRISIS PREVENTION

In Bermuda, abuse and neglect plague both children and their parents. Many families function perpetually in crisis mode from generation to generation, unable to escape the vicious cycle.

PURPOSE AND IMPACT OF THE GRANT

In 1996, the Family Centre, an NGO that opened its doors in 1990 as an academic enrichment programme, decided to broaden its focus. The centre launched Caring for Families, an outreach effort designed to help stabilise families with primary-school-aged children.

The programme provides families with access to individual and family counseling, home- and school-based interventions, and group therapy. Every family works with a family-support specialist and a psychologist. In 2004, the programme served 110 families. As a result of Atlantic funding, the centre was able to increase the number of families helped to 130.

In addition to Caring for Families, the centre also manages community projects aimed at improving services for children and families. Its Communities That Care programme, for example, seeks to reduce risks and promote resilience. In partnership with the Ministry of Health, the centre manages the Bermuda Prevention Network, the Bermuda National Standards Committee and the Inter-Agency Committee for Children and Families. These efforts to promote quality service and facilitate community development made the Family Centre the first social service agency in Bermuda to receive international accreditation.

With its 2005 grant from Atlantic, the organisation has begun taking steps to ensure its sustained ability to build on this strong foundation of support and credibility. The centre is crafting a long-term development strategy and business plan to continue introducing best practices to Bermuda so that fewer families will experience debilitating crises.

Child Trends (\$2.2 million), a premier U.S. child- and youth-focused research institution for over 25 years, has tracked more than 80 key indicators of child health and education, conducted numerous evaluations, and developed data to inform policy and practice. Despite outstanding efforts, their high-quality, comprehensible research is not readily accessible to practitioners, policy makers and the general public. Our support of Child Trends' Research-to-Results Roundtable addresses this need.

Objective 3: Give voice to children's needs By 2010, there will be a new national, non-partisan tax- and budget-focused advocacy organisation that will have strengthened the national commitment to children, and at least ten existing advocacy organisations will have greater capacity to encourage private and public funders to invest in children and support effective preventive policies and priorities.

Progress and Learning to Date

We approved ten grants totalling \$15.6 million to help evidence-based advocacy increase the prominence of children's issues in the public debate.

First Focus (formerly The Children's Investment Project) (\$6.0 million), funded by Atlantic through its grantee **America's Promise**, is the first organisation that can speak for children and families — especially disadvantaged ones — on tax and budget issues in a way that resonates across the political spectrum.

The **Center on Budget and Policy Priorities** (\$2.5 million) was instrumental in rolling back the highly damaging Taxpayer Bill of Rights (TABOR) initiatives in several states.

Children Now (\$150,000) and **Common Sense Media** (\$650,000) were instrumental in advocating for legislation to curtail violent content in video games and other media, laying the groundwork for a grassroots movement among parents of all political persuasions on behalf of children.

Multi-Objective Work — Demonstrating Results at the Local Level

A critical long-term Atlantic goal is to create the expectation among the public and policy makers that disadvantaged children should have the same access as all other children to comprehensive, high-quality learning, health, mentoring and family-support services. We believe that showing success in multiple locations, measuring impact on target outcomes, and communicating the results to the public and policy makers will help secure greater public investment in high-quality, comprehensive services for poor children.

The **Institute for Community Change** (ICC) (\$1.9 million) helped launch our local investment strategy. For ten years, the principals of ICC, including former three-term Seattle Mayor Charles Royer, have managed the Robert Wood Johnson Foundation's Urban Health Initiative. The Institute for Community Change applies expertise in government, politics, management and communications to help foundations implement and manage large, local initiatives. In early 2006, ICC offered recommendations on which U.S. states and cities are most likely to demonstrate the positive effects of combined learning, health and connection investments.

2005 Grantees

BERMUDA

Open Airways

PURPOSE: To increase the NGO's ability to identify, reach and support youth with asthma in Bermuda.

AMOUNT: \$360,000

TERM: Three years

The Family Centre

PURPOSE: To strengthen The Family Centre, a national advocate for quality service and facilitator of community development, by providing core support for the Caring for Families programme, which intervenes for families in crisis, and building its capacity to raise funds.

AMOUNT: \$490,000

TERM: Two years

NORTHERN IRELAND

Business in the Community Northern Ireland

PURPOSE: To review and evaluate Business in the Community's current education programmes. They are designed to improve literacy, mathematical and computing skills and to support children in the transition from primary to secondary school. The evaluation will lead to improvements being made to the education programmes and an expansion of the number of sites where they operate.

AMOUNT: £600,000

TERM: Two years and 11 months

Children's Law Centre

PURPOSE: To strengthen its Advice Line for Kids and Youth (CHALKY) and increase the number of children who can access CHALKY. The Children's Law Centre works to improve the lives of children by using the law to deliver their rights.

AMOUNT: £469,000

TERM: Three years

Springwell Centre

PURPOSE: To produce a ten-year plan for children in Lurgan by developing a local consortium.

AMOUNT: £150,000

TERM: One year

The Belfast Door Project

PURPOSE: To help develop its model of comprehensive support to young people and to develop links with government and other funders.

AMOUNT: £100,000

TERM: One year and three months

REPUBLIC OF IRELAND

Children's Rights Alliance

PURPOSE: To enhance advocacy on behalf of Irish children by supporting the production and dissemination of the Irish "Shadow Report" to coincide with the 2006 UN Review of the UN Convention on the Rights of the Child.

AMOUNT: €104,000

TERM: One year and seven months

Clondalkin Partnership

First Grant

PURPOSE: To demonstrate the efficacy of a preventive model for children in primary schools with behavioural problems by supporting programme development planning and evaluation design.

AMOUNT: €220,000

TERM: Nine months

Second Grant

PURPOSE: To enable Clondalkin Partnership, which is one of 38 local partnerships established to counter disadvantage in specific areas, to develop the Incredible Years Programme by supporting the development of a model for a Parent Support Network in Ireland.

AMOUNT: €25,500

TERM: Six months

Galway University Foundation

PURPOSE: To strengthen best-practice evaluation and research in the youth-serving field by supporting planning for expansion of the scope and capacity of the Child and Family Research and Policy Unit.

AMOUNT: €258,000

TERM: One year

Irish Youth Foundation

PURPOSE: To strengthen best-practice dissemination, evaluation and research in the field by supporting planning for the creation of a child information agency.

AMOUNT: €215,000

TERM: One year

Northside Partnership

PURPOSE: To demonstrate the efficacy of a promising model of early intervention for children (pre-natal to five years old) by supporting implementation of a demonstration programme in Ireland on Dublin's Northside. This project works with disadvantaged children and their families so that the children are ready for school by age five.

AMOUNT: €2,866,000

TERM: Six years

Society of St. Vincent De Paul

PURPOSE: To better understand the needs of children affected by domestic violence and family conflict by supporting initial planning of a potential direct service in County Mayo.

AMOUNT: €61,500

TERM: One year

The Shanty Educational Project, Ltd. (An Cosan)

PURPOSE: To enable transition to the implementation phase of a ten-year plan for children in the disadvantaged Dublin suburb of Tallaght West, by extending the current planning phase to March 2006.

AMOUNT: €191,000

TERM: One year and three months

UNITED STATES

Afterschool Alliance

PURPOSE: To increase U.S. government investment in effective and comprehensive out-of-school-time programmes for disadvantaged children and youth by strengthening advocacy, conducting research and building constituencies.

AMOUNT: \$2,200,000

TERM: Three years

America's Promise – The Alliance for Youth

First Grant

PURPOSE: To enable America's Promise, Communities In Schools and the United Way to coordinate and evaluate services for disadvantaged children displaced by Hurricane Katrina.

AMOUNT: \$3,500,000

TERM: Two years

Second Grant

PURPOSE: To improve practice among youth service providers by strengthening the capacity of this national intermediary.

AMOUNT: \$5,000,000

TERM: Three years

Third Grant

PURPOSE: To launch the Children's Investment Project (now First Focus), a bipartisan effort focused on federal and state tax and budget advocacy to increase and then sustain investment in children.

AMOUNT: \$6,000,000

TERM: Three years

Big Brothers Big Sisters of America

PURPOSE: To link more children with caring adults by strengthening the capacity of this national mentoring organisation.

AMOUNT: \$3,500,000

TERM: One year and six months

Center on Budget and Policy Priorities

First Grant

PURPOSE: To enhance the Center's ability to influence federal and state budget and tax policies by providing core support.

AMOUNT: \$2,000,000

TERM: Two years

Second Grant

PURPOSE: To fund education, research, advocacy and regranting activities on federal budget and tax policies and on safeguarding critical domestic programmes for low-income families.

AMOUNT: \$495,000

TERM: One year

Child Trends Incorporated

PURPOSE: To support its Research-to-Results Roundtables, which provide collaborative opportunities to bridge the information gap between researchers, practitioners, media and youth.

AMOUNT: \$2,200,000

TERM: Four years

Children Now

PURPOSE: To improve the media environment for children by convening media, advertising and advocacy leaders to establish a plan for voluntary industry action.

AMOUNT: \$150,000

TERM: One year and one month

Citizen Schools

PURPOSE: To enable Citizen Schools to offer a high-quality, out-of-school time programme by enhancing its internal operations.

AMOUNT: \$2,500,000

TERM: One year and six months

City Year

PURPOSE: To enable City Year to advocate for sustained funding for AmeriCorps.

AMOUNT: \$100,000

TERM: One year

Common Sense Media

PURPOSE: To support business planning and general operations for this nonprofit organisation dedicated to giving parents and kids a choice and a voice about the media they consume. This will help establish an influential constituency base to advocate for more appropriate media consumption.

AMOUNT: \$650,000

TERM: One year and five months

Communities In Schools

PURPOSE: To develop Communities In Schools' ability to monitor the success of its programmes on an ongoing basis. Communities In Schools is an American nonprofit organisation dedicated to helping kids access community support.

AMOUNT: \$4,000,000

TERM: Three years

Fight Crime: Invest in Kids

PURPOSE: To expand Fight Crime: Invest in Kids' reach and to build capacity for influencing policy by increasing the organisation's ability to recruit new members, convene meetings and strengthen communications capabilities.

AMOUNT: \$1,300,000

TERM: One year and six months

Food Research and Action Center

PURPOSE: To support the Food Research and Action Center's efforts to improve out-of-school-time providers' access to and use of federal nutrition entitlements.

AMOUNT: \$750,000

TERM: Three years

Foundations, Inc.

PURPOSE: To provide general support for Foundations, Inc.'s Center for Afterschool and Community Education, which offers training and curriculum for the staff of after-school and summer programmes throughout the U.S.

AMOUNT: \$1,900,000

TERM: Two years

Fund for the City of New York

PURPOSE: To support the Youth Development Institute (YDI) at the Fund for the City of New York, which provides technical assistance to Beacon Community Centers that offer quality after-school and summer programmes for youth in seven U.S. cities.

AMOUNT: \$3,250,000

TERM: Four years

Higher Achievement Program, Inc.

PURPOSE: To provide evaluation support to the Higher Achievement Program, which offers four years of intensive academic support to 300 middle-school children in Washington, D.C.

AMOUNT: \$750,000

TERM: Two years

Impact Strategies, Inc.

PURPOSE: To strengthen "Ready by 21," a youth development planning framework that enables national and local organisations in the youth field, as well as public officials and business leaders, to better understand and act on the needs of young people in a coordinated and outcomes-focused fashion.

AMOUNT: \$600,000

TERM: Two years

Institute for Community Change

PURPOSE: To support the Institute for Community Change to plan a local initiative to improve outcomes for children and youth in as many as four U.S. cities and states. The Institute will explore local capacity to help disadvantaged children and youth access quality after-school and summer programmes, comprehensive adolescent health care and caring mentors.

AMOUNT: \$1,900,000

TERM: Two years

James B. Hunt Jr. Institute for Educational Leadership & Policy Foundation

PURPOSE: To strengthen and inform funding policy for integrated learning by educating policy makers and education leadership. "Integrated learning" refers to programmes that combine effective academics with youth development strategies that can be accessed by youth both in and out of school time.

AMOUNT: \$1,600,000

TERM: Four years

National Foundation for Teaching Entrepreneurship

PURPOSE: To help children from low-income communities improve their academic, business, technology and life skills by providing school-based entrepreneurial education.

AMOUNT: \$3,000,000

TERM: Two years

The After-School Corporation

PURPOSE: To improve the quality of out-of-school-time instruction for disadvantaged children and youth through staff development.

AMOUNT: \$2,000,000

TERM: Three years

The Aspen Institute

PURPOSE: To support its Roundtable on Community Change, a forum for community leaders and organisations to explore solutions to common challenges. The Roundtable will pilot a series of seminars to help address impediments faced by youth of colour.

AMOUNT: \$450,000

TERM: One year

The Bridgespan Group

PURPOSE: To enhance selected grantees' opportunity for success by developing business plans with The Bridgespan Group's assistance.

AMOUNT: \$1,500,000

TERM: One year and six months

The Tides Center, as fiscal agent for The Children's Partnership

PURPOSE: To support the Children's Partnership's publication and dissemination of *The Digital Opportunities Measuring Stick Report*, the first in a series of reports that will measure U.S. progress in giving all kids the opportunity to acquire high-level technology skills.

AMOUNT: \$50,000

TERM: One year

Trustees of Boston University

PURPOSE: To assess the benefits of the Family Advocacy Program, which provides legal counsel in health care settings, by conducting an external outcomes evaluation.

AMOUNT: \$900,000

TERM: Two years

Voices for America's Children

PURPOSE: To strengthen and support local, state and national advocacy by funding infrastructure expansion and training for member organisations.

AMOUNT: \$1,800,000

TERM: Two years



OVERVIEW

In South Africa, Nelson Mandela is among the thousands of people participating in Treatment Action Campaign's (TAC) treatment access rallies to make antiretroviral (ARV) drugs available through the public health service.

Region	No. of Grants	Total in Millions
Australia	3	\$ 38.3
South Africa	12	\$ 14.3
Viet Nam	20	\$ 28.8
Other	12	\$ 7.2
TOTAL	47	\$88.6

BRINGING LASTING CHANGE TO



Le Nhan Phuong



Courtesy of TAC



Le Nhan Phuong

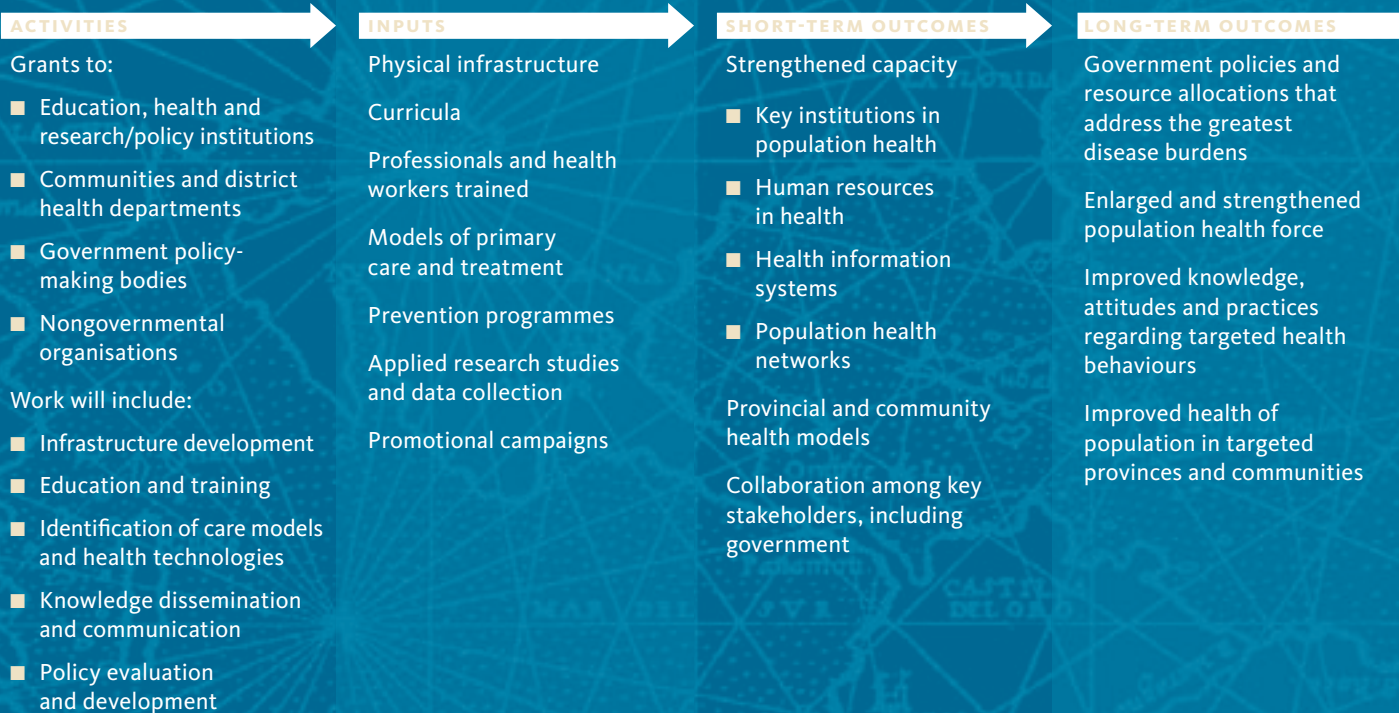
Population Health

The Population Health Programme's goal is to make significant and measurable contributions toward improving the health and well-being of the populations of Viet Nam and South Africa. Our Board approved the Population Health Programme for implementation in South Africa in September 2005. However, we had an exploratory programme underway there for 18 months. Our Viet Nam programme began in 1999. Due to the differing development stages of health care in each country, the needs vary significantly. For that reason, we have separate goals in Viet Nam and South Africa, with the exception of one shared goal of eyesight improvement and protection.

In South Africa, we plan to strengthen the public health system by supporting programmes that train key personnel in people management, implementation skills and leadership. We also strive to increase the capacity of important institutions to advocate, based on robust analysis, for a more effective and accessible public health system, better resource allocation and faster implementation in a time of crisis.

In Viet Nam, we aim to achieve our goal of strengthening the public health system by supporting interventions to strengthen key national and provincial institutions, develop replicable provincial and community models, promote healthy behaviour and promote population health policy.

THEORY OF CHANGE: POPULATION HEALTH



IMPLEMENTING THE THEORY OF CHANGE TO ACHIEVE OUR GOALS

In 2005, we approved a total of \$43.1 million in grants for the Population Health Programmes in Viet Nam and South Africa. We have made significant progress toward each of the seven objectives. Based on our initial investments in South Africa, we plan to concentrate our grantmaking in three provinces: Western Cape, KwaZulu-Natal and one yet to be identified.

In Viet Nam, most 2005 grants focused on strengthening key national and provincial institutions and developing replicable provincial and community models. There were also grants toward each remaining objective: to promote healthy behaviour, population health policy, and vision protection and sight restoration.

The following grants provide examples of our work.

1. Strengthen key national and provincial institutions

Reach Vietnam (East Meets West Foundation) received \$7.0 million for the Phase I campus development of the **Ha Noi School of Public Health**. We also made a \$1.0 million grant directly to the school for Phase 3 of capacity building in public health training and research.

2. Develop replicable provincial and community models

To focus on improving primary health care at the commune level for the more than two million inhabitants of Khanh Hoa Province and Da Nang City, we provided five grants totalling \$8.8 million to: **Da Nang City Health Department** (\$1.7 million), **Khanh Hoa Provincial Health Services** (\$4.2 million), **Save the Children** (\$1.6 million), **Marie Stopes International** (\$1.0 million) and **Vietnam Veterans of America Foundation** (\$300,000).

3. Promote healthy behaviour

Johns Hopkins University received \$130,000 to perform a feasibility study for establishing the Viet Nam Centre for Health Communication Programmes.

4. Promote population health policy

Our \$499,900 grant to the **Viet Nam Ministry of Health** will strengthen the coordination of injury prevention programmes.

5. Support the training of key personnel in people management, implementation skills and leadership

Our \$2.3 million grant helped the **Centre for Rural Health, University of KwaZulu-Natal (UKZN)**, in South Africa develop a model for improving access to and quality of rural health care, working in three districts by implementing training for health professionals, monitoring health services and encouraging the formation of learning networks.

The Centre will identify and introduce formal and informal educational training programmes for health professionals in clinical management and operational activities in three KwaZulu-Natal health districts. It will also improve exposure of UKZN Health Science faculty and students through visits to rural health facilities, the introduction of rural health seminars and through encouragement of practical research projects in rural areas.

6. Strengthen the capacity of important institutions to advocate, based on robust analysis, for a more effective and accessible public health system, better resource allocation and faster implementation in a time of crisis.

Our \$1.1 million grant to the **Health Systems Trust** will help to improve information systems in priority health programmes in two health districts. Through this grant, Health Systems Trust will:

- Improve information systems for specified priority health care programmes and support services
- Increase the practical use of information about these programmes by health care planners, managers and providers at the district and sub-district level through skills training
- Provide national and provincial health authorities with developed and tested district health information systems for adoption.

7. Promote a population health approach to sight restoration and vision protection

The **Fred Hollows Foundation** received three grants totalling \$6.4 million for both countries. Our support of the **Fred Hollows Foundation South Africa** enables it to construct Sabona Centre, a training centre for blindness prevention and sight restoration in the Eastern Cape Province. The Sabona Centre, and its five satellites in rural hospitals, conducts high-volume cataract surgeries, trains surgeons, provides an eye-banking service, and operates a child eye-health programme to identify refractive error and provide spectacles at the district clinic level. In Viet Nam, the objective is to improve vision health services in three central provinces.

STRATEGIC OBJECTIVES

South Africa

Under apartheid, quality medical services catered mainly to the more affluent and urban white population, creating great disparities in access to and delivery of health care services. In the 1990s, South Africa's new Constitution established the basic right of access to health care for all. Despite these good intentions, health care is critically inadequate due to a chronic shortage of population health professionals—including health economists, policy analysts and epidemiologists—and a lack of information and policy analysis.

There is an acute need to increase the supply and retention of human resources in health to address the AIDS pandemic and the increasing burden of chronic disease and unhealthy behaviours. Equally challenging is the goal to establish equitable access to general health services to improve the health of the disadvantaged. To achieve and sustain these gains, there is a need to strengthen key institutions, build and retain human resources in health and establish government policies that will have a sustained impact on population health.

The short-term trend in human resources for health shows a slight decline in key public-sector health personnel. The greatest urgency is the overall decrease in professional nurses. In most provinces, the lack of nursing staff threatens the core of health service delivery. In addition, the fields of health economics and epidemiology are wholly underdeveloped and lack staff.

Improving information systems that monitor health system performance and identify weaknesses can lead to better resource allocation and service provision. The startling gaps in information for planning compromise efforts and advocacy for equitable deployment of public health resources.

Meaningful protection and assurance of the population's health requires a collective effort. Forming close partnerships with communities and civil society groups, particularly those representing people living with HIV/AIDS, will be crucial to achieving health targets and to the wider goal of strengthening health systems.

Cataracts, though preventable and treatable by a simple procedure, cause blindness and suffering for so many people, especially the indigent population. Eye care is generally poor in the public sector, and there is a lack of skilled personnel to serve in this field.

In 2005, we approved \$14.3 million in grants to support three major objectives.

Objective 1: Support the training of key personnel in people management, implementation skills and leadership

By 2009, selected key institutions in population health in South Africa will be strengthened to make a significant and measurable contribution toward enhancing:

- Human resources in health
- Policies focused on improving the health of the population of South Africa.

Progress and Learning to Date

We approved six grants totalling \$7.4 million, including the **Centre for Rural Health** (\$2.3 million), which is improving access to health care in three rural districts in KwaZulu-Natal by training health professionals working in these districts and by exposing Health Sciences faculty, staff and students to rural health services.

The institutional capacity of the **AIDS Foundation of South Africa** (\$3.9 million) is benefiting from an expanded mentorship and advocacy role in support of Community Health Worker Programmes for home-based care of patients. The **University of Cape Town** received \$37,733 to evaluate the Oliver Tambo Fellowship Programme for training senior managers in the health sector.

The Foundation for Professional Development (\$1.0 million) is establishing a nonprofit placement agency that will actively recruit, place and support the retention of health professionals in the public health sector.

The **University of the Western Cape** (\$111,910) received a planning grant to develop a strategic plan for its School of Public Health to address its long-term programme goals and needs.

The lack of human resources is widely acknowledged as the greatest obstacle to achieving the public health goals. Greater attention and investment in this critical component of the health sector are vital to address a global crisis aggravated by the HIV/AIDS pandemic. Preparation and training of an appropriately skilled workforce for public health remains a problem, as is the equitable distribution and retention in areas where they are most needed.



GRANTEE PROFILE

GRANTEE

Khanh Hoa Provincial Health Department

YEAR AWARDED

2005

PROJECT

Improve Commune-Level Facilities for Primary Health Care in Khanh Hoa Province, Phase II

DURATION

31 Months
(30 September 2005 to 29 April 2008)

REGION SERVED

Viet Nam

AMOUNT AWARDED

\$4.2 million

Objective 2: Strengthen the capacity of important institutions to advocate, based on robust analysis, for a more effective and accessible public health system, better resource allocation and faster implementation in a time of crisis

By 2009, South Africa will have strengthened advocacy, information planning and management systems to help provincial and national governments more effectively target financial and human resources at the greatest disease burdens in the country.

Progress and Learning to Date

We approved four grants totalling \$2.0 million in support of this objective. **Health Systems Trust** received a \$1.1 million grant to improve information systems for specified priority health care programmes and support services in two districts. The **Treatment Development Trust** (\$271,783) of the Treatment Action Campaign purchased its current offices in order to create a secure and accessible home base for the Treatment Action Campaign.

The Topsy Foundation received a \$344,000 grant to strengthen and evaluate a replicable best-practice model for HIV and AIDS intervention and mitigation in poor, rural communities. Lastly, the **Population Council** (\$325,000) is assessing the role of community-based organisations in implementing the government's plan to roll out ARV therapies and to identify barriers to such use.

A comprehensive information system is an essential pillar of a health system. It enables evidence-based advocacy for improved access to health care and resource allocation, good planning and management, and fosters equity in health delivery. In 2006, we will continue to identify examples of successful health service delivery at the district level with a view to strengthening and subsequently promoting and supporting advocacy for national replication of these models by government.

Objective 3: Promote a population health approach to sight restoration and vision protection

By 2009, both South Africa and Viet Nam will have piloted sight restoration and blindness treatment and prevention programmes. Capacity will be developed at the local level to help design and roll out these initiatives.

Progress and Learning to Date

In 2005, we approved two grants totalling \$4.9 million to the **Fred Hollows Foundation South Africa**, in partnership with the Eastern Cape provincial government, to help restore sight and prevent blindness. The foundation also has developed a replicable model for training and retaining scarce skills for the public sector, serving the rural poor (See page 29).

Viet Nam

Viet Nam, with a population of 82 million, ranks as the 13th most populous country in the world with one of the highest densities. In recent years, Viet Nam has seen the re-emergence of infectious diseases, including tuberculosis and dengue fever, and new threats such as SARS and avian flu. However, as Viet Nam becomes more developed, deaths and disabilities due to noninfectious causes, such as injury and lifestyle behaviour, are increasing at a more rapid rate.

Without evidence-based, population-focused advocacy and policies, officials are likely to skew the country's health budget to higher-end, higher-cost clinical interventions rather than to community-based preventive practices and lower-cost, accessible interventions.

Health strategies in Viet Nam are implemented at the provincial level, so it offers the most fertile opportunity for leveraging grantmaking to impact national policies and provide models for the best local health practices.

IMPROVING THE HEALTH CARE SYSTEM, ONE COMMUNITY AT A TIME

The primary health care system in many Vietnamese provinces began to deteriorate rapidly in the mid-1980s as agricultural co-operatives were dismantled under a new government policy. This deterioration had a particularly severe impact on commune health centres (CHCs), which serve the country's disadvantaged and vulnerable people — including rural residents, the poor, women, children, minorities and physically or mentally disabled people.

Attempts to restore and support the CHCs have addressed only isolated problems, and the government's contributions, though important, have been limited. The health care system needed a more integrated, holistic approach at the rural level and allow the CHCs to meet the needs of disadvantaged and vulnerable populations.

PURPOSE AND IMPACT OF THE GRANT

In a province with more than one million people, the Khanh Hoa Provincial Health Department oversees nearly 140 CHCs, most of which are in need of renovation or reconstruction.

In 2003, the department committed to transform the province into a national model for health care system reform, after the development of a seven-year master plan. A key component of this plan involves the restoration of the capabilities and effectiveness of the CHCs.

In 2004, our exploratory \$400,000 grant enabled the department to reconstruct and equip seven CHCs — a nationally recognised effort praised by the Ministry of Health. We commissioned an independent survey, which confirmed that improved health care facilities can have a catalytic effect on the reform of a region's health care system.

The department obtained more than \$2.0 million from government sources to reconstruct another 24 CHCs and upgrade 38 CHCs. The Government of Viet Nam also committed more than \$15.0 million over a five-year period to help the department improve the health facility infrastructure at the provincial and district levels.

In 2005, we awarded a new grant to enable the Department to reconstruct and equip the remaining 62 CHCs, completing the transformation of the province's communal health system by 2009.

Having accurate information about public health problems and the right ideas to solve them are not enough to ensure that officials will enact the right policy. Improved collaboration and interaction among key stakeholders, especially the government, are an integral component of achieving effective, long-lasting impact.

We awarded \$28.8 million in grants to support our five objectives.

Objective 1: Enlarge and strengthen population health force

By 2009, four key institutions in population health in Viet Nam will be strengthened to make a significant and measurable contribution towards improving the health and well-being of the population of Viet Nam.

Progress and Learning to Date

We approved a \$153,500 planning grant to the **Queensland University of Technology — Faculty of Health Sciences**. Its staff worked closely with the three faculties of public health at medical universities in the central, southern and Mekong River Delta regions to develop a capacity-building master plan for each institution. They are: Ho Chi Minh City University of Medicine and Pharmacy, Can Tho University of Medicine and Pharmacy, and Hue Medical University. In 2006, these master plans will assist our staff in identifying the most strategic and effective ways to help Vietnamese institutions improve their teaching and research curricula.

We approved two grants totalling \$1.6 million for sustainable and effective human capital infrastructure.

The **Ha Noi School of Public Health** (\$1.0 million) received a grant to continue building its human resources for public health teaching. This school is one of the most important institutions to provide a solid core of competent public health trainers and researchers to establish the foundation for future work.

Three grants totalling nearly \$11.0 million provide sustainable infrastructure.

The Ha Noi School of Public Health greatly needs new physical facilities to carry out its work. Atlantic provided Phase 1 support through the **Reach Vietnam (East Meets West Foundation)** (\$7.0 million) as the implementing grantee. We expect them to break ground on the project during the second half of 2006.

Objective 2: Services & practices — improved population health

By 2009, provincial population health care and prevention will be strengthened in at least three provinces to provide models capable of replication nationally.

We approved two grants totalling \$2.5 million for health information systems. The **Menzies Research Institute** (\$2.0 million) received funding to establish a surveillance and monitoring system for noncommunicable diseases in Viet Nam. The **Population Council** is using its \$510,000 grant to perform pre-interventional assessments of primary health care at the commune level in three provinces.

This data will contribute to the efforts of policy makers at the national and provincial levels to design more effective interventions for the health system. The provincial health data will help us to identify future grantmaking opportunities for these provinces.

To provide for initiatives capable of replication, we approved seven grants, totalling \$11.4 million, for Khanh Hoa and Da Nang City provinces, with a combined population of over 2.2 million. This cluster of grants follows a successful 2003 grant for Khanh Hoa to address the facility needs of its primary health care system. Our grants address both the structured needs and the human and policy needs of the system. The international NGOs are working in the fields of children's health (**Save the Children** — \$1.6 million), reproductive health (**Marie Stopes International** — \$1.0 million) and community mental health (**Vietnam Veterans of America Foundation** — \$300,000). Provincial governments have also made significant financial and other contributions to the overall project.



GRANTEE PROFILE

GRANTEE Treatment Development Trust for Treatment Action Campaign	DURATION 23 Months (01 April 2004 to 31 March 2006)
REGION SERVED South Africa	GRANT 2 Office Purchase
GRANT 1 Treatment Literacy Programme & Operating Support	AMOUNT AWARDED ZAR1.7 million
AMOUNT AWARDED ZAR7.5 million	YEAR AWARDED 2005
YEAR AWARDED 2004	DURATION 12 Months (01 November 2005 to 31 October 2006)

Objective 3: Improve knowledge, attitudes & practices

By 2009, there will exist a national health promotion organisation that applies effective evaluation and assessment techniques to measure impact and assist in the continuing development of effective behaviour modification programmes.

We approved one grant, totalling \$130,000, to **Johns Hopkins University** to develop a feasibility study for the establishment of a Viet Nam Centre for Health Communication Programmes. As Viet Nam's disease profile changes from mostly infectious disease to a behaviour-based profile of chronic illnesses due to tobacco and other lifestyle choices, the need for a Centre of Excellence in Health Communications has been identified as key to the success of Population Health Programmes. We expect to find further grantmaking opportunities from this feasibility study.

Objective 4: Government policies and resource allocations

By 2009, three advocacy models for working with the government will be established to address selected public health issues that pose the greatest burden and serve to encourage the integration of health care services, health promotion and disease prevention.

Progress and Learning to Date

We approved one planning grant totalling \$50,000 to the **University of Queensland** to assist the Government of Viet Nam to convene a workshop, titled "Evidence Base for Health Policy Development." The workshop was highly successful in bringing government and academics in population health together to identify gaps in the current health information system for policy development. Its final report will serve as a guide to develop a grant proposal in 2006.

Objective 5: Vision protection & restoration By 2009, both South Africa and Viet Nam will have piloted sight restoration and blindness treatment and prevention programmes. Capacity will be developed at the local level to help design and roll out these initiatives.

Progress and Learning to Date

We approved a \$1.5 million grant to the **Fred Hollows Foundation Vietnam** to improve vision health services over three years in three provinces in central Viet Nam. The aim is to improve local providers' capacity to perform eye surgeries for treatable blindness and offer blindness prevention programmes. Provincial governments have contributed 10 per cent of the cost of this popular project.

Australia

We have pursued opportunities in Australia to leverage significant public investment in the development of facilities for medical research. To this end, we made three significant grants in 2005.

These grants are intended to leverage Australia's world-class expertise in clinical service and academic research, address earlier detection of disease, improve response rates, increase options for patients and, ultimately, improve quality of life. Wherever possible, Atlantic has supported and encouraged its Australian grantees to address the health needs of more vulnerable and disadvantaged populations in the region and to partner with population-health-oriented institutions, most notably in Viet Nam.

We approved two grants of \$15.3 million each for **Queensland University of Technology (QUT)** and the **University of Queensland**. Both grants support the construction of facilities for medical research. In Brisbane, we are supporting the establishment of QUT's Centre for Physical Activity, Health and Clinical Education to expand research, education and community health activities. At the University of Queensland, we are helping with the development of the Clinical Research Centre, which will deliver the clinical application of biomedical innovations.

We also provided a \$7.6 million grant to **Wesley Research Institute** for its endowment campaign to develop a Clinical Trials Centre and Tissue Bank, and to establish a Research Fellowship Programme in Australia.

South Africa has one of the highest HIV/AIDS rates in the world. A joint study by the Human Sciences Research Council and the Nelson Mandela Foundation in 2004 estimated that 15.6 per cent of South Africans have the disease, with higher infection rates in some parts of the country. The economic and developmental impacts of HIV/AIDS threaten to undo many achievements of this democracy.

The situation was hindered by the government's questioning of the link between HIV and AIDS, and by its slowness to treat those with the disease through the public health service. In other developing countries, the life expectancy of people with AIDS has improved demonstrably when antiretroviral drugs have been provided.

Prospects for progress increased in late 2005. The government gave the provinces sufficient leeway to mount interventions that have helped ameliorate some of the devastation from HIV/AIDS. Robust interventions initiated by civil society organisations, most notably the Treatment Action Campaign, have complemented these efforts.

PURPOSE AND IMPACT OF THE GRANTS

The Treatment Action Campaign captured and leveraged the groundswell of public opposition manifested as a result of the South African government's original HIV/AIDS policies. TAC mobilised a grassroots movement of people with HIV, mostly in poor communities, to advocate for better care. Its strategic blend of research, public advocacy and litigation — backed by social activism and media outreach — is an exemplar for social change.

Due to highly publicised court cases, TAC forced the government to comply with its constitutional obligations and to provide ARVs through the public health service. TAC also won huge public support after the principled and well-publicised actions of Chairman Zackie Achmat, who has AIDS. He refused to take ARVs, even though he had the financial means, until the drugs were available to all. By supporting TAC, we hope to reduce measurably the rate of increase in new infections and prolong the productive lives of those with the disease.

POPULATION HEALTH

2005 Grantees

AUSTRALIA

Queensland University of Technology

PURPOSE: To support construction and establishment of the Centre for Physical Activity, Health and Clinical Education in Brisbane by the Queensland University of Technology, to expand its research, education and community health capacity.

AMOUNT: AUD20,000,000

TERM: One year and 11 months

University of Queensland

PURPOSE: To improve patient care and health care delivery through the clinical application of biomedical innovations in Queensland by helping to fund the development of the Clinical Research Centre for its largest hospital.

AMOUNT: AUD20,000,000

TERM: Two years and three months

Wesley Research Institute

PURPOSE: To contribute to the \$30 million endowment campaign to establish a Clinical Trials Centre and Tissue Bank, and establish a Research Fellowship Programme in Australia.

AMOUNT: AUD10,000,000

TERM: Three years

SOUTH AFRICA

AIDS Foundation of South Africa

First Grant

PURPOSE: To conduct an assessment of AIDS Foundation of South Africa's current and projected capacity to strengthen community-based organisations that train and support community health workers.

AMOUNT: ZAR130,000

TERM: Six months

Second Grant

PURPOSE: To strengthen the AIDS Foundation of South Africa's capacity to improve access to good quality health care services, by facilitating partnerships and networks among community-based organisations, community health facilities and the Department of Health.

AMOUNT: ZAR25,000,000

TERM: Four years

Centre for Rural Health

PURPOSE: To improve access to and quality of health care in three rural districts in KwaZulu-Natal by implementing training for health professionals, monitoring rural health services and encouraging the development of health learning networks.

AMOUNT: ZAR14,500,000

TERM: Three years and one month

Health Systems Trust

PURPOSE: To provide support for Health Systems Trust, in conjunction with the School of Public Health at the University of the Western Cape, to improve information systems in priority health programmes in two pilot Health Districts in South Africa.

AMOUNT: ZAR6,500,000

TERM: Three years

Population Council

PURPOSE: To assess the role of community-based organisations in implementing the government's plan to roll out antiretrovirals and to identify barriers to their use in South Africa.

AMOUNT: \$325,000

TERM: One year

2005 Grantees *(continued)*

The Foundation for Professional Development

PURPOSE: To establish a nonprofit placement agency that will actively recruit, place and support the retention of health professionals in the public health sector in South Africa.

AMOUNT: ZAR6,500,000

TERM: Three years

The Fred Hollows Foundation South Africa

First Grant

PURPOSE: To fund the design and costing of the Sabona Centre, a multi-functional eye hospital to be located in Queenstown in the Eastern Cape.

AMOUNT: ZAR1,000,000

TERM: Six months

Second Grant

PURPOSE: To construct the Sabona Centre, a multi-functional eye hospital, in Queenstown to provide local and regional high-volume cataract surgery, train cataract surgeons and establish a Centre of Excellence.

AMOUNT: ZAR30,000,000

TERM: Five years

The Topsy Foundation

PURPOSE: To strengthen and evaluate a replicable best-practice model for HIV and AIDS intervention and mitigation in rural, poor communities in South Africa.

AMOUNT: ZAR2,000,000

TERM: One year

Treatment Development Trust

PURPOSE: To assist in the purchase of office premises for the Treatment Action Campaign in Cape Town, thus supporting TAC's campaigns for affordable treatment for people infected with HIV/AIDs and its setting of the public agenda for change.

AMOUNT: ZAR1,700,000

TERM: One year

University of Cape Town Development Office

PURPOSE: To evaluate the Oliver Tambo Fellowship managed by the University of Cape Town by funding two external evaluators.

AMOUNT: ZAR250,000

TERM: Six months

University of the Western Cape

PURPOSE: To develop the long-term strategic plan for the University of the Western Cape's School of Public Health.

AMOUNT: ZAR700,000

TERM: One year

VIET NAM

Da Nang City Health Department

PURPOSE: To improve the capacity of primary health services in this city in central Viet Nam by constructing and renovating the commune-level health care facilities.

AMOUNT: \$1,700,000

TERM: Two years and seven months

Ha Noi School of Public Health

PURPOSE: To establish the Ha Noi School of Public Health as a Centre of Excellence in Public Health in Viet Nam by improving the quality of its training programmes and establishing a Centre for Applied Research and Training in Health Economics and Health Policy.

AMOUNT: \$1,000,000

TERM: Three years

Johns Hopkins University

PURPOSE: To fund a study by the Center for Communications Programs at Johns Hopkins University to determine the feasibility of establishing a Viet Nam Centre for Health Communication Programmes, in support of public health initiatives there.

AMOUNT: \$130,000

TERM: Nine months

Khanh Hoa Provincial Health Department

PURPOSE: To improve commune-level primary health services in Khanh Hoa Province by building and equipping 62 new health care facilities.

AMOUNT: \$4,200,000

TERM: Two years and seven months

Kids First Vietnam

PURPOSE: To assist the Kids First Rehabilitation & Vocational Training Village in central Viet Nam to attain self-sufficiency by providing resources to complete the construction of its facilities and support its first year of operation.

AMOUNT: \$270,000

TERM: One year

Marie Stopes International Australia

PURPOSE: To improve the population's reproductive health in Viet Nam's Khanh Hoa Province and Da Nang City by providing training and support for commune health networks to deliver quality, community-based family planning and reproductive health services.

AMOUNT: \$1,000,000

TERM: Three years and three months

Menzies Research Institute

PURPOSE: To provide Viet Nam's policy makers and health planners with quality information on health issues that pose the greatest burden by establishing a sustainable national system for non-communicable disease surveillance in Viet Nam.

AMOUNT: \$2,000,000

TERM: Four years

Ministry of Health of the Socialist Republic of Viet Nam

PURPOSE: To strengthen the injury prevention capacity within the Viet Nam Administration of Preventive Medicine through building its ability to coordinate the resources needed to pilot a system of Emergency Injury Information and Referral Services.

AMOUNT: \$499,900

TERM: Two years and six months

Population Council

PURPOSE: To improve the understanding of primary health care system needs at the commune level and build local capacity by supporting pre-interventional assessments in Thai Nguyen, Hue and a southern province in Viet Nam.

AMOUNT: \$510,000

TERM: Two years

Queensland University of Technology

PURPOSE: To build institutional public health master-planning capacity in Viet Nam by helping three faculties of public health develop their institutional master plans.

AMOUNT: AUD200,000

TERM: Six months

Reach Vietnam

First Grant

PURPOSE: To improve Viet Nam's health system capacity by providing general operating support to the East Meets West Foundation through its subsidiary Reach Vietnam for 2006–2008.

AMOUNT: \$3,750,000

TERM: Three years

Second Grant

PURPOSE: To build the capacity of the Ha Noi School of Public Health by completing the Phase I construction and equipping of student dormitories, classrooms, Information Resource Centre and student union facilities.

AMOUNT: \$7,000,000

TERM: Four years

Royal Children's Hospital Foundation

First Grant

PURPOSE: To support communication and coordination efforts between the hospital planning consultants of the National Hospital of Paediatrics (NHP) and the Vietnamese Government to develop a new NHP campus.

AMOUNT: AUD265,000

TERM: Nine months

Second Grant

PURPOSE: To expand cardiac surgery capacity at the Hue Central Hospital, the sole heart surgery facility in central Viet Nam, by sending teams of surgical, medical and administrative personnel to training programmes in Viet Nam and abroad.

AMOUNT: AUD3,000,000

TERM: Five years and two months

Third Grant

PURPOSE: To improve the capacity of paediatric health care providers at major paediatric hospitals in Hue and Ha Noi by supporting a portion of Royal Children's Hospital International's core operating expenses for 2007–2010.

AMOUNT: AUD800,000

TERM: Four years

Save the Children

PURPOSE: To strengthen community health care systems in Da Nang and Khanh Hoa provinces by improving and modelling maternal and newborn health practices.

AMOUNT: \$1,600,000

TERM: Two years and six months

The Fred Hollows Foundation

PURPOSE: To pilot sight restoration and blindness treatment and prevention programmes by developing an effective community-based vision care network in three central provinces of Viet Nam.

AMOUNT: \$1,500,000

TERM: Three years and two months

University of Queensland

PURPOSE: To support a national workshop on the burden of disease in Viet Nam and assess the health data information system for policy-making and planning.

AMOUNT: \$50,000

TERM: One year

Viet Nam Union of Friendship

PURPOSE: To complete the construction and fit-out of its Information Resource Centre by providing supplementary funding for construction, labour and equipment.

AMOUNT: \$40,000

TERM: One year

Vietnam Veterans of America Foundation

PURPOSE: To improve community mental health access and services in Viet Nam by assessing needs and modelling a community-based system of mental health and rehabilitation services.

AMOUNT: \$300,000

TERM: One year

OTHER — ASIA

RAMA Foundation

PURPOSE: Assisting the RAMA Foundation to build and equip its new headquarters in Bangkok, to better coordinate and conduct its rural medical outreach activities for the villagers of rural Thailand.

AMOUNT: \$250,000

TERM: One year

OTHER — CUBA

Clarity Educational Productions, Inc.

PURPOSE: To provide supplemental support for the production of a documentary film on the Cuban health system and its impact on international health care in resource-constrained environments.

AMOUNT: \$85,000

TERM: One year and two months

Harvard University Medical School

PURPOSE: To assess how to best improve the quality of life of people living with AIDS in a resource-poor setting by analysing the social and clinical impact of the provision of highly active antiretroviral therapy to AIDS patients in Cuba.

AMOUNT: \$240,000

TERM: Two years

*Institute of Nephrology**

PURPOSE: To fund the development of medical and teaching infrastructure for the Institute of Nephrology.

AMOUNT: \$1,400,000

TERM: One year and three months

Medical Education Cooperation with Cuba

First Grant

PURPOSE: To strengthen international appreciation and application of the Cuban health system and its international outreach initiatives by supplementing funding to enhance the distribution and long-lasting impact of a documentary film on these subjects.

AMOUNT: \$150,000

TERM: Two years

Second Grant

PURPOSE: To support development of an international forum for “Alliances in Action for Global Health” to be co-sponsored in Cuba in early 2007 by the World Health Organization, Cuban Health Ministry and the Pan American Health Organization.

AMOUNT: \$265,000

TERM: One year and ten months

Third Grant

PURPOSE: To enhance the quality, circulation and influence of *MEDICC Review*, the only English language source for health news and medical research in Cuba — and to transform the journal into the *International Review of Cuban Medicine*.

AMOUNT: \$450,000

TERM: Two years and four months

Fourth Grant

PURPOSE: To provide essential medical texts — a “backpack medical bibliography” — for graduating international medical students returning to their developing countries after completing their medical studies in Cuba.

AMOUNT: \$625,000

TERM: Two years and 11 months

*National Medical Sciences Information Center (CNICM)**

PURPOSE: To upgrade editorial processes and capacities at the National Medical Sciences Publishing House, Havana.

AMOUNT: \$320,000

TERM: Two years

*Vice Ministry for Teaching and Research, Cuban Ministry of Public Health**

First Grant

PURPOSE: To support the publication of textbooks for students.

AMOUNT: \$212,000

TERM: Ten months

Second Grant

PURPOSE: To provide de-centralised printing and copying facilities to 32 university campuses and institutions across Cuba engaged in training of Cuban and international students in medical, dentistry, nursing and allied health professions.

AMOUNT: \$980,000

TERM: One year

OTHER — MIDDLE EAST

Center for Mind-Body Medicine

PURPOSE: To help Palestinians and Israelis recover from the trauma of war and sustain them psychologically as they work toward peace with one another by supporting a programme of self-care, mind-body skills and group support.

AMOUNT: \$2,230,000

TERM: Three years

* The donor is The Atlantic Charitable Trust, a charitable trust registered with the Charity Commission for England and Wales.



OVERVIEW

In 2005, the U.S. Supreme Court ruled the juvenile death penalty unconstitutional.

Region	No. of Grants	Total in Millions
Northern Ireland	6	\$ 8.1
Republic of Ireland	9	\$ 13.2
South Africa	14	\$ 8.7
United States	14	\$ 16.6
TOTAL	43	\$46.6

BRINGING LASTING CHANGE TO



Jurgen Schadeberg



Helen Macdonald/Out in Africa



Helen Macdonald/Out in Africa

Reconciliation & Human Rights

The Reconciliation & Human Rights Programme (R&HR) operates in the United States, Northern Ireland, Ireland and South Africa. The Atlantic Philanthropies work to secure and protect access to rights, justice and services for disadvantaged and vulnerable groups that lack the resources and capacity to enforce their rights. In Northern Ireland and South Africa, the programme also addresses the legacy of violent conflict which prevents movement toward reconciliation, stability and the protection of rights.

To achieve these goals, we support interventions to improve government policy and the practices of public service providers, to strengthen the field of civil liberties and human rights organisations, including their voices, and to develop evidence-based policies and practices that contribute to reconciliation.

THEORY OF CHANGE: RECONCILIATION & HUMAN RIGHTS

Expertise and efforts of grantees

Atlantic's investment in Reconciliation & Human Rights

Improve government policy and the practices of public service providers

Strengthen the human rights field and its voice

Increase reconciliation efforts

Better policy development, implementation and enforcement

Strengthened and sustainable field

Increased awareness

Policy interventions for peace-building gaining credibility

Access to rights, justice and services

Northern Ireland and South Africa are more stable, inclusive, non-violent societies concerned with the protection of rights

IMPLEMENTING THE THEORY OF CHANGE TO ACHIEVE OUR GOALS

In 2005, we awarded a total of \$46.6 million of grants for Reconciliation & Human Rights, compared to \$25.1 million in 2004.

In South Africa, our primary focus was farm workers and the rural poor. In Ireland, we emphasised immigrants and strengthening the general infrastructure for protecting rights. In Northern Ireland, we focused on integrating education; and in the United States, our emphasis was on protecting rights post-9/11.

Based on our Theory of Change, we plan to:

1. Improve government policy and the practices of public service providers

The **Justice Project** received \$4.0 million to support a coalition working to reform indigent defence in Texas. This grant provides for research, advocacy, communications and litigation. There are encouraging signs that these organisations are beginning to influence the Texas policy debate.

2. Strengthen the human rights field and its voice

The **Irish Council for Civil Liberties** in the Republic of Ireland received \$3.6 million to enhance its capacity to influence policymaking, legislation and practice. The Council provides a legal analysis of the human rights implications and impact of government policy and practice, and advocates for change.

3. Increase reconciliation efforts

The **National Peace Accord Trust** in South Africa received a \$1.1 million grant to develop a pilot programme to integrate ex-combatants back into society.

The **Integrated Education Fund (IEF)** in Northern Ireland is using its \$4.3 million grant to increase the numbers of Protestant and Catholic children attending school together. Atlantic's grant has helped the IEF to raise additional resources from private sources, provide financial support for the opening of new schools, and undertake an advocacy and communications strategy to promote a more positive government policy toward integrated education.

STRATEGIC OBJECTIVES

Northern Ireland

Northern Ireland is a society seeking to emerge from a long and bloody conflict. The legacy of the conflict remains, conditioning the day-to-day experiences of those most affected by it and their willingness to engage with members of the other community. Achievement of the shared society envisioned in the Belfast Agreement of 1998 will depend on deeply divided communities forging trust and rejecting violence. Inequality and abuse of human rights had a central role in the conflict.

Creating a society where people feel they will be treated fairly is a key requirement for lasting stability and peace in Northern Ireland. Unfortunately, discrimination, inequality and prejudice are still prominent features of life.

In 2005, Atlantic approved \$8.1 million in support of our three objectives.

Objective 1: Infrastructure for accessing rights By 2008, there will be a strong and effective Bill of Rights in place and at least five organisations will have been greatly strengthened in their capacity to protect rights, resulting in improved access to rights and reductions in discriminatory policies, particularly for minority ethnic groups and people with disabilities.

Progress and Learning to Date

We approved four grants totalling \$3.4 million. **Disability Action** (\$2.7 million) has undertaken lobbying, advocacy and litigation to bring about policy changes to improve the lives of disabled people. **British Irish Rights Watch** (\$570,310) is working to secure a strong and inclusive Bill of Rights for Northern Ireland.

The **Human Rights Trust** received a \$35,874 grant to enable the Human Rights Consortium, a coalition of more than 100 NGOs, to develop a long-term strategy to influence the Bill of Rights debate in Northern Ireland. The **Law Centre Northern Ireland** received \$43,426 to develop proposals to strengthen its policy and advocacy role.

We also commissioned consultants to assess the potential for using strategic litigation to protect rights in Northern Ireland.

Objective 2: An inclusive education system By 2008, 8 per cent of children will be in integrated schools, and there will be increased opportunities for integration within the mainstream education system.

Progress and Learning to Date

We made a \$4.3 million grant to the **Integrated Education Fund** to increase the number of children attending integrated schools. This grant has already levered in excess of \$2.0 million from private and government sources. A communications initiative has significantly increased the integrated movement's profile in the international, national and regional media and has supported a series of localised campaigns with parents' groups. As for the 8 per cent target, we will not fully know the progress until the 2006–2007 school year.

We commissioned consultancy work to increase opportunities for integration within the mainstream education sector. This has identified a range of investment options which would provide incentives for sharing and collaboration among the different school types in Northern Ireland. These plans will be implemented in 2006. The rapidly changing educational landscape in Northern Ireland, coupled with an increasing excess capacity in schools, presents significant challenges and opportunities.

Objective 3: Peace-building strategies and policies

By 2008, replicable evidence-based models, demonstrated to be effective in cross-community reconciliation and peace-building, will have been piloted in up to three locations, and strong mechanisms will be in place to influence wider policy.

Progress and Learning to Date

Our grant to the **Queen's University Belfast** for \$442,223 supports international comparative research on effective models of community-based peace building.

Several consultancy reports identified a short list of geographic areas where we could support local peace-building initiatives. This groundwork has paved the way for significant grantmaking in 2006.

In 2005, we hosted a private seminar, which brought together for the first time key public officials and the representatives of the restorative justice projects that we have funded. There are signs that the government is actively considering providing mainstream funding for these projects. Evaluation results show a marked decrease in the levels of violent "punishment attacks" where the projects operate.

Republic of Ireland

Although Ireland's recent economic success has helped bring about progress in many areas, there is growing concern about increasing levels of inequality, prejudice, racism and discrimination in Irish society. Legislation and services do not provide enough help to those groups suffering discrimination. Disadvantaged people need strong, independent organisations to advocate on their behalf.

In 2005, we approved \$13.2 million in support of our two objectives.

Objective 1: Access to rights and services By 2008, immigrants, people with disabilities and the lesbian, gay, bisexual and transgendered (LGBT) community will have secured increased protection of rights and greater access to services to which they are entitled. At least six advocacy organisations will have been significantly strengthened to campaign effectively on behalf of these target groups.

Progress and Learning to Date

We provided seven grants totalling \$7.3 million to support access to rights, with a particular focus on immigration in 2005. We made capacity-building grants to three advocacy organisations: **Refugee Information Service** (\$1.7 million), **Immigrant Council of Ireland** (\$1.7 million) and **Migrants Rights Centre Ireland** (\$1.0 million).

In collaboration with a number of European and American foundations, we supported two additional immigration-related initiatives. **The Migration Policy Institute** (\$60,000) and the **European Programme on Integration and Migration** (\$177,165) are leveraging international learning and influence developments at the European and domestic levels.

In 2004, the **Children's Rights Alliance** received a grant to support the work of The Coalition Against the Deportation of Irish Children. The Coalition led a particularly successful advocacy campaign to convince the government to change its position and allow the migrant parents of Irish-born children to apply for residency. As a result, some 16,500 people who faced deportation have received permission to remain in Ireland.

A number of grantees also coordinated a successful campaign for the government to provide a safety net to tackle the poverty experienced by migrants during temporary periods of unemployment. This regulation change could provide benefits for approximately 130,000 people.



GRANTEE PROFILE

PROJECT

Campaign to Abolish the Juvenile Death Penalty

REGION SERVED

United States

YEAR AWARDED

2004

GRANTEE 1

National Coalition to Abolish the Death Penalty

AMOUNT AWARDED

\$400,000

GRANTEE 2

Amnesty International USA

AMOUNT AWARDED

\$255,000

GRANTEE 3

The Justice Project

AMOUNT AWARDED

\$375,000

DURATION

19 Months
(01 June 2004
to 31 December 2005)

In 2005, there were some indications that the climate surrounding LGBT issues is becoming more conducive to change. We made two grants in this area: **Gay and Lesbian Equality Network** (\$2.5 million) and **National Lesbian and Gay Federation** (\$96,104) in support of the KAL Advocacy Initiative. Both grants seek increased protection of rights and access to services through public education, litigation and legislative advocacy.

While the Irish government passed the long-awaited Disability Bill in early 2005, its implications for disabled people are still the subject of debate. We have commissioned research to help inform our future investment strategy.

Objective 2: Strengthening the central human rights infrastructure

By 2008, at least four effective organisations will exist to advocate for the protection and advancement of human rights and these organisations will be working collaboratively.

Progress and Learning to Date

We provided two grants totalling \$5.6 million to advocate for human rights. **Irish Council for Civil Liberties** (\$3.6 million) received renewal of a core support grant to build its research, legal analysis and advocacy capacity. The funds will also enhance its capacity to work collaboratively with others, including organisations supported under our first objective.

Human Rights Trust received a \$2.0 million grant to support the Participation and Practice of Rights project to equip local activists in North Belfast and North Dublin with the skills to apply human rights tools to tackle local community problems.

South Africa

Despite the advent of democracy, a progressive constitution, and social and economic progress on many fronts, South Africa remains a society with deep social divisions and the trauma from its violent past. Some 46 per cent of the population live in rural areas, most in deep poverty. Farm workers, approximately 15 per cent of the workforce, are an especially exploited and marginal group.

Even though a comprehensive framework of legislation protects the human rights of South Africans as never before, some groups are targets of stigma and remain vulnerable. They include black, mostly poor, gays and lesbians living in townships and rural areas, and migrants, including asylum seekers and refugees, who are the targets of xenophobia. Society's failure to meet the needs of 80,000 ex-combatants also threatens national reconciliation and stability.

In 2005, Atlantic approved \$8.7 million in support of our two objectives.

Objective 1: Access to rights and services By 2008, immigrants, the gay community, and farm workers and the rural poor will have secured increased protection of rights and greater access to the services to which they are entitled under the South African Constitution. At least six advocacy organisations will have been significantly strengthened to campaign effectively on behalf of these target groups.

MAKING THE CASE THAT KIDS ARE DIFFERENT

In January 2004, the U.S. Supreme Court agreed to hear *Roper v. Simmons*, a Missouri case that would require the Court to consider the constitutionality of the juvenile death penalty. Shortly after this announcement, a small group of funders, including Atlantic, invited a coalition of leading groups to develop a comprehensive advocacy campaign in support of the *Simmons* case. The aim of the advocacy effort was to ensure that the legal team was fully resourced and that, through a robust communications and grassroots advocacy effort, the Court and key opinion makers understood two things: “Kids are Different” and that the standards of decency in the United States had evolved concerning the punishment of minors.

PURPOSE AND IMPACT OF THE GRANTS

Atlantic provided support to three of the approximately 17 groups in this ad hoc coalition: The National Coalition to Abolish the Death Penalty, Amnesty International USA and The Justice Project. Atlantic’s support provided resources for the coordination of message development, communications and media outreach. It also supported a national grassroots education and mobilisation drive. Hundreds of groups around the country held public events and speak-outs against the juvenile death penalty, providing additional access to the media and key opinion makers.

In March 2005, the U.S. Supreme Court ruled that committing juvenile offenders to death was contrary to the Constitution, and abolished the practice.

Progress and Learning to Date

We awarded nine grants totalling \$5.2 million for these vulnerable groups. Three gay and lesbian organisations received support, bringing to nine the total number of gay-sector organisations supported. New grantees are **Durban Lesbian and Gay Community and Health Centre** (\$246,407), **Pietermaritzburg Gay and Lesbian Network** (\$98,904) and **Forum for the Empowerment of Women** (\$514,403).

Most of these organisations are members of the Joint Working Group, an informal alliance of regional organisations committed to common national lobbying and advocacy programmes. In collaboration with the Joint Working Group, the Dutch funding agency HIVOS, the U.S.-based Synergos Institute and Atlantic are supporting a capacity-building and sustainability programme for our grantees.

The **Lesbian & Gay Equality Project**, a 2004 grantee, took a case that resulted in the Constitutional Court ruling that the ban on same sex marriages was unconstitutional. Aside from the positive decision, there are hopes that it will, in the longer term, help to reduce the widespread homophobia, which frequently manifests in serious violence against gay people.

Grants in support of farm workers and the rural poor also formed a significant part of our work. The **Natal University Development** (\$771,605) for the Centre for Criminal Justice at the University of KwaZulu-Natal and the **Black Sash Trust** (\$1.0 million) supported the provision of legal services in remote rural areas and resulted in increased access to social grants—a crucial safety net to alleviate poverty.

The **Legal Assistance Trust** (\$404,400) supported a legal challenge to the *Communal Land Rights Act*, which effectively deprives women of property rights and livelihoods. Judgement is expected in 2006.

The **Rural Legal Trust** (\$1.0 million) has partnered with the Legal Aid Board, the main source of legal support for indigent people, to run a demonstration project with civil cases, such as the illegal evictions of farm dwellers. The Legal Aid Board previously had only provided defence in criminal cases.

We also supported three grantees to engage in an integrated lobby and advocacy campaign, the Farm-Life Project, to highlight the socio-economic conditions of farm workers. The project received significant media coverage of the problems and issues, which are now more firmly on the political agenda.

On behalf of immigrants, we awarded one grant and commissioned two consultancies to provide needed information. The **Lawyers for Human Rights’** (\$963,980) Refugee Rights Project supports legal advice and litigation.

The first consultancy mapped the nature and scale of human rights abuses against the target group and recommended ways for overcoming them, and the other is helping identify a consortium to move work forward in this area.

Objective 2: Coming to terms with the past By 2008, replicable evidence-based models, demonstrated to be effective in re-integrating ex-combatants back into society, will have been piloted in up to four locations, and strategies developed to raise consciousness about the past will contribute towards overcoming the legacies of apartheid.

Progress and Learning to Date

We awarded four grants totalling \$3.5 million under this objective. To inform our programme in relation to ex-combatants, we supported a baseline data study to estimate the size of the ex-combatant population and its socio-economic status.



GRANTEE PROFILE

GRANTEE	YEAR AWARDED
The Integrated Education Fund	2005
PROJECT	DURATION
Growth of Integrated Education	48 Months (31 March 2005 to 30 March 2009)
REGION SERVED	
Northern Ireland	
AMOUNT AWARDED	
£2,250,000	

National Peace Accord Trust (\$1.1 million) and the **Centre for the Study of Violence and Reconciliation** (\$983,292) received grants for their work to integrate ex-combatants into society. We hope these initiatives will provide models worth replicating elsewhere.

The **Centre for the Study of Violence and Reconciliation** (\$1.2 million) received support for research into the fate of over 200 political activists who disappeared during the anti-apartheid struggle. The project will canvass their families and associates for views on how to commemorate their lives.

United States

Human rights in the United States have eroded under the strain of the “war on terror.” New United States security measures further threaten international human rights standards, and there are serious concerns about torture. Legal and undocumented immigrants face discrimination and harassment. Neglect of human rights has grown within the judiciary as well as other branches of government. In the last 30 years, millions have lost voting and other civil rights because of discriminatory sentencing and felon-disenfranchisement practices.

In 2005, we approved \$16.6 million of grants in support of our three objectives.

Objective 1: Protecting rights post-9/11 By 2008, at least five organisations will have been strengthened in their capacity to protect the rights of citizens, immigrants and refugees who have suffered in the aftermath of 9/11, and these organisations will be operating in a coordinated fashion.

Progress and Learning to Date

We approved six grants totalling \$7.4 million, supporting four key organisations to protect rights in the post-9/11 environment: **Human Rights Watch** (\$1.8 million), **Human Rights First** (\$2.5 million), **National Security Archive Fund** as fiscal agent for the Center for National Security Studies (\$1.0 million) and **Yale Law School's National Litigation Project** (\$450,000). Atlantic resources provide for increased capacity to counter human rights violations incurred in the name of counter terrorism and national security.

Several grantees worked on a successful effort to protect the right of the 500-plus Guantanamo detainees to test the legality of their detention in the courts. Another success was passage of The McCain Amendment to prevent the use of torture by U.S. personnel.

The **Asian American Justice Center** received \$1.5 million for continued core support to the Rights Working Group, a national network of organisations committed to protect core civil and human rights.

Objective 2: Migrants' access to human rights protections and remedies By 2008, comprehensive and rights-centred versions of recent proposals to protect immigrants in the U.S., both documented and undocumented, will have been enacted.

Progress and Learning to Date

We made four grants totalling \$4.6 million in support of comprehensive immigration reform.

The **Coalition for Comprehensive Immigration Reform (CCIR)** (\$4.0 million) focuses on a programmatic strategy to combine legislative advocacy for comprehensive immigration reform with a field-organising initiative. Momentum for immigration reform increased in 2005. At mid year, Senators John McCain and Edward

IMPROVING TOLERANCE AND PROMOTING PEACE

Northern Ireland is deeply divided with religious segregation in almost every aspect of life, including 94 per cent of its children in segregated schools. Research shows that most young children have sectarian prejudices. For 20 years, a parent-led movement has been working to educate children together. While demand is high, many children cannot enter integrated schools due to a lack of space.

While the government lacks a coherent, proactive policy to promote integrated education, schools can qualify for financial support after proving their viability. Establishing a new school is a formidable undertaking, and significant voluntary parental effort and financial support are often needed to kick-start and sustain schools.

The Integrated Education Fund (IEF) strives to provide a solid financial foundation for the growth of integrated education. It raises and dispenses funds to promote and support integrated schools, particularly loans and guarantees for new schools that lack the requisite number of enrolments to qualify for government support.

PURPOSE AND IMPACT OF THE GRANT

Previous Atlantic grants to the IEF have facilitated progress in integration. In September 2004, seven new integrated schools opened, representing the largest increase in the provision of integrated education since the parent-led movement began. This grant is designed to increase the number of children in integrated schools by strengthening the fundraising, advocacy and communications capacity of the movement.

This grant will help IEF increase the number of children attending integrated schools from 5.2 per cent to 8 per cent, enable policy changes that make it easier to establish new schools and integrate segregated schools, and raise \$7.3 million from private sources. The grant will also increase government and parental support for integrated education, continue growth within the integrated sector and help increase tolerance and reduce prejudice within society.

Kennedy of the Senate Judiciary Committee, greatly informed by CCIR's advocacy, introduced comprehensive immigration reform legislation. Expectations that the Senate would move first on immigration reform legislation proved wrong, and late in 2005, the House passed an enforcement-only bill that would criminalise people without documents. The year ended with the immigration debate back in the Senate, and the CCIR and its charitable arm, the New American Opportunity Campaign, preparing for this next phase of the legislative process.

The American Prospect had a \$150,000 grant to produce and distribute a special issue dedicated solely to comprehensive immigration reform. **Innovation Network** (\$184,000) received resources to evaluate the work of CCIR.

National Council of La Raza (\$300,000), a coalition of nearly 300 affiliated community-based Latino civil rights and advocacy organisations, received support to examine the impact of state anti-immigrant ballot initiatives on the national comprehensive immigration reform debate.

Objective 3: Reform of justice procedures By 2008, punishment in the U.S. will better reflect basic human rights principles in the following ways: a prohibition on executions in at least two states; reinstatement of voting rights for ex-felons in at least three states; and the reform of the public defender system in at least two states. (Previously, this objective had included a focus on abolition of the juvenile death penalty in three states.)

Progress and Learning to Date

We provided four grants totalling \$4.5 million for justice reform.

Atlantic, with two other funders, had awarded grants in 2004 to support the Roper v. Simmons case, which challenged the constitutionality of the juvenile death penalty. In March 2005, the Supreme Court ruled that the juvenile death penalty was indeed unconstitutional, ending it throughout the United States. In order to learn from this success, we funded an evaluation of the strategic advocacy effort behind the Supreme Court victory.

In light of the Court's verdict, we re-focused our objective on the death penalty itself. In 2005, we provided funding for state anti-death penalty campaigns to **New Yorkers for Justice** (\$200,000) on behalf of New Yorkers Against the Death Penalty and the **New Jersey Association on Corrections** as fiscal agent for New Jerseyans for Alternatives to the Death Penalty (\$100,000).

In respect of indigent defence, we provided three years of support to **The Justice Project** (\$4.0 million) for a coalition in Texas to use public education, litigation and legislative advocacy to secure further reforms in that state.

Multi-Objective Work

As we advance our U.S. programme goals in human rights, it is evident that there are core skills that all of our advocates need to be effective and sustainable. We find, for example, that in many human rights organisations, there is limited capacity for effective communications, monitoring and evaluation, advocacy and human rights framing. The **U.S. Human Rights Fund** received \$150,000 for a yearlong capacity assessment of a broad cross-section of human rights groups.

2005 Grantees

NORTHERN IRELAND

British Irish Rights Watch

PURPOSE: To enable British Irish Rights Watch to work toward securing a strong and inclusive Bill of Rights in Northern Ireland, help victims of the conflict access their rights and assist individuals in dealing with the legacy of the past conflict by providing core support.
AMOUNT: £325,000
TERM: Three years

Disability Action

PURPOSE: To enhance the capacity of Disability Action to influence policy in order to promote the rights of disabled people in Northern Ireland.
AMOUNT: £1,540,000
TERM: Three years

Human Rights Trust

PURPOSE: To support the Human Rights Consortium to carry out a planning process.
AMOUNT: £19,000
TERM: Four months

Law Centre NI

PURPOSE: To assist Law Centre NI to become a more effective advocate for the rights of disadvantaged and vulnerable people by supporting the costs of a planning process.
AMOUNT: £23,000
TERM: Four months

Queen's University Belfast

PURPOSE: To inform and enhance the quality of community-based peace-building initiatives by carrying out international comparative research and improving the capacity of local practitioners.
AMOUNT: £230,000
TERM: One year and four months

The Integrated Education Fund

PURPOSE: To help integrate education by strengthening the fundraising, advocacy and communications capacity of the integrated education movement in Northern Ireland.
AMOUNT: £2,250,000
TERM: Four years

REPUBLIC OF IRELAND

Gay and Lesbian Equality Network

PURPOSE: To improve the ability of the gay community to access their rights and services by developing the strategic capacity of this organisation.
AMOUNT: €2,100,000
TERM: Five years

Human Rights Trust

PURPOSE: To improve people's access to their rights and services by conducting a demonstration project of a participative rights-based approach to social justice.
AMOUNT: £1,102,500
TERM: Three years

Immigrant Council of Ireland

PURPOSE: To improve the human rights protections and access to services afforded to immigrants in Ireland by developing the capacity of the Immigrant Council of Ireland.
AMOUNT: €1,400,000
TERM: Four years

Irish Council for Civil Liberties

PURPOSE: To enhance the protection of the human rights of the disadvantaged in Ireland by strengthening the capacity of the Irish Council for Civil Liberties.
AMOUNT: €3,000,000
TERM: Five years

Migrant Rights Centre Ireland

PURPOSE: To protect and improve migrant workers' rights and access to services by developing the capacity of the Migrant Rights Centre Ireland.
AMOUNT: €850,000
TERM: Three years

Migration Policy Institute

PURPOSE: To develop the strategic capacity of migration organisations through an international leadership exchange programme.
AMOUNT: \$60,000
TERM: One year and nine months

National Lesbian and Gay Federation

PURPOSE: To improve the access of co-habiting couples to their rights by providing support for the KAL Advocacy Initiative that seeks the establishment of civil partnership legislation in Ireland.
AMOUNT: €80,000
TERM: One year and seven months

Network of European Foundations for Innovative Cooperation

PURPOSE: To improve European Union migration and integration policies by supporting the European Programme for Integration and Migration aimed at promoting a broader debate and commitment in the member states to developing positive integration policies and programmes.
AMOUNT: €150,000
TERM: Five years and two months

Refugee Information Service

PURPOSE: To improve access to justice and services for refugees in Ireland by developing the organisational and advocacy capacity of the Refugee Information Service.
AMOUNT: €1,400,000
TERM: Four years

SOUTH AFRICA

Centre for Education Policy Development

PURPOSE: To provide funding to cover the costs of a two-month sabbatical for Geoff Budlender, an outstanding public interest lawyer.
AMOUNT: £20,000
TERM: Seven months

Centre for Education Policy Development

First Grant

PURPOSE: To carry out a baseline data study of the socio-economic status of South African ex-combatants.
AMOUNT: ZAR1,000,000
TERM: Nine months

Second Grant

PURPOSE: To provide the basis for the design of successful future communications campaigns by evaluating the Farm Life in South Africa Project.
AMOUNT: ZAR1,076,780
TERM: One year and four months

Centre for the Study of Violence and Reconciliation

First Grant

PURPOSE: To develop replicable models for service delivery to ex-combatants by supporting the integration and consolidation of this organisation's existing re-integration projects for ex-combatants.
AMOUNT: ZAR6,267,702
TERM: Three years

Second Grant

PURPOSE: To advance reconciliation by involving marginalised and grassroots constituencies in projects commemorating the human rights abuses of the past.
AMOUNT: ZAR7,707,016
TERM: Two years

Durban Lesbian and Gay Community and Health Centre

PURPOSE: To support service delivery and coalition-building activities in the gay community by contributing to the core costs of this centre.
AMOUNT: ZAR1,500,000
TERM: One year

Forum for the Empowerment of Women

PURPOSE: To support service delivery and coalition-building activities in the gay community by contributing to the core costs of this organisation.

AMOUNT: ZAR3,000,000

TERM: Three years

Lawyers for Human Rights

PURPOSE: To improve access to justice and services for refugees, asylum seekers and undocumented migrants, by supporting the legal advice, litigation and lobbying activities of the Refugee Rights project.

AMOUNT: ZAR6,150,000

TERM: Three years

National Peace Accord Trust

PURPOSE: To develop a replicable model for the social re-integration of ex-combatants in South Africa.

AMOUNT: ZAR6,500,000

TERM: One year and six months

Pietermaritzburg Gay and Lesbian Network

PURPOSE: To promote the organisation of the gay community in the Midlands area of KwaZulu-Natal by providing start-up and core support to the Pietermaritzburg Gay and Lesbian Network.

AMOUNT: ZAR635,300

TERM: One year

Rural Legal Trust

PURPOSE: To investigate how the Legal Aid Board, which provides free legal support to indigent people, might assist people living on farms, by implementing a two-year pilot project managed by the Rural Legal Trust.

AMOUNT: ZAR6,000,000

TERM: Two years

The Black Sash Trust

PURPOSE: To enable the Black Sash Trust to develop and consolidate its services by providing core support.

AMOUNT: ZAR6,000,000

TERM: One year and six months

The Legal Assistance Trust

PURPOSE: To enable the rural poor in South Africa to access rights and services by mounting a legal challenge to the Communal Land Rights Act.

AMOUNT: ZAR2,500,000

TERM: Two years

The Natal University Development

PURPOSE: To provide core support in order to consolidate the activities of the Centre for Criminal Justice in South Africa.

AMOUNT: ZAR4,500,000

TERM: One year and 11 months

UNITED STATES

The American Prospect

PURPOSE: To publish a special report on comprehensive immigration reform.

AMOUNT: \$150,000

TERM: One year and seven months

Asian American Justice Center

PURPOSE: To support the Rights Working Group's efforts to better protect U.S. civil and human rights by ensuring that advocacy groups work in a coordinated fashion.

AMOUNT: \$1,500,000

TERM: Three years

Coalition for Comprehensive Immigration Reform

PURPOSE: To enact comprehensive proposals to protect the rights of immigrants in the United States.

AMOUNT: \$4,000,000

TERM: Two years

Human Rights First

PURPOSE: To provide core support for the litigation, advocacy and communications efforts of the U.S. Law and Security programme of this organisation dedicated to protect human rights and the rule of law.

AMOUNT: \$2,500,000

TERM: Five years

Human Rights Watch

PURPOSE: To provide core support for Human Rights Watch's U.S. counter terrorism project.

AMOUNT: \$1,800,000

TERM: Four years

Innovation Network, Inc.

PURPOSE: To monitor, assess and draw lessons from the Coalition for Comprehensive Immigration Reform campaign.

AMOUNT: \$184,000

TERM: Two years

National Council of La Raza

PURPOSE: To examine the impact of state anti-immigrant ballot initiatives on the national comprehensive immigration reform debate.

AMOUNT: \$300,000

TERM: Seven months

National Security Archive Fund, as fiscal agent for Center for National Security Studies

PURPOSE: To enable the Center to continue to play a leading role in the fight to preserve individual rights and, in particular, to stop the government's targeting of immigrants and other members of minority communities in the name of anti-terrorism.

AMOUNT: \$1,000,000

TERM: Four years

New Jersey Association on Corrections, as fiscal agent for New Jerseyans for Alternatives to the Death Penalty

PURPOSE: To achieve the abolition of capital punishment in the state of New Jersey by supporting a legislative advocacy and constituency-building campaign led by New Jerseyans Against the Death Penalty.

AMOUNT: \$100,000

TERM: One year and three months

New Yorkers for Justice, on behalf of New Yorkers Against the Death Penalty

PURPOSE: To abolish capital punishment in the state of New York by supporting a legislative advocacy and constituency-building campaign led by New Yorkers Against the Death Penalty.

AMOUNT: \$200,000

TERM: Two years

The Justice Project

PURPOSE: To improve access to justice in Texas by providing three years of support for a coalition effort to reform indigent defence systems across the state.

AMOUNT: \$4,000,000

TERM: Three years

U.S. Human Rights Fund

PURPOSE: To increase advocates' effectiveness by producing a capacity-building skills assessment and roadmap of the U.S. civil and human rights movement.

AMOUNT: \$150,000

TERM: One year

Utilization-Focused Evaluation

PURPOSE: To strengthen U.S. human rights advocacy and funding practice by providing support for an in-depth assessment and evaluation of the 2004 coalition effort to end the juvenile death penalty.

AMOUNT: \$196,000

TERM: One year

Yale Law School

PURPOSE: To provide core support to the litigation efforts of Yale Law School's National Litigation Project, which protects human rights and the rule of law.

AMOUNT: \$450,000

TERM: Five years

Viet Nam Higher Education

From 1999 to 2003, The Atlantic Philanthropies focused on strengthening higher-education opportunities in Viet Nam by supporting the development of learning resource centres at key regional universities and building the capacity of these learning resource centres and their programmes. In 2005, Atlantic made ten grants, totalling \$13.4 million, toward the completion of, and eventual exit from, our higher-education work in Viet Nam. The list of grantees follows:

Can Tho University

PURPOSE: To support the sustainable development of the new Can Tho University Learning Resource Center by helping fund core services and providing seed funding for training and development.

AMOUNT: \$875,000

TERM: Three years

Hue University

PURPOSE: To support the sustainable development of the Learning Resource Center at Hue University in central Viet Nam by helping fund core services and providing seed funding for training and development.

AMOUNT: \$875,000

TERM: Three years

National Center for Scientific and Technological Information

First Grant

PURPOSE: To support the standardisation of bibliographic description in Viet Nam by translating the AACR2, the Anglo-American cataloguing rules, into Vietnamese and promoting its application in Vietnamese libraries.

AMOUNT: \$120,000

TERM: One year and four months

Second Grant

PURPOSE: To support the sustainable development of the consortium of Learning Resource Centers and libraries in Viet Nam, to increase its access to electronic databases and print resources, and to train staff to maximise the resources' utilisation.

AMOUNT: \$800,000

TERM: Three years and two months

Reach Vietnam

PURPOSE: To complete the construction of the sports complex at the University of Da Nang in central Viet Nam by upgrading the outdoor sports field.

AMOUNT: \$350,000

TERM: One year and one month

RMIT International University Viet Nam

PURPOSE: To complete the development of the RMIT-VN campus in the new Saigon South area of Ho Chi Minh City by supporting the construction and fit-out of a dormitory facility and indoor sports complex.

AMOUNT: \$6,500,000

TERM: Two years

Simmons College

PURPOSE: To build leadership capacity for the five Atlantic-funded Learning Resource Centers in Viet Nam by educating 25 staff members in a combined U.S.-Viet Nam graduate-level Masters of Library Science training and internship programme.

AMOUNT: \$1,830,000

TERM: Three years and one month

Thai Nguyen University

PURPOSE: To support the sustainable development of the Learning Resource Center at Thai Nguyen University in the northern mountainous area by helping fund core services and providing seed funding for training and development.

AMOUNT: \$975,000

TERM: Four years

The University of Hawaii

PURPOSE: To build the human resource capacity of the Learning Resource Center staff at Can Tho, Da Nang and Hue Universities by supporting their development of operations and management sustainability plans.

AMOUNT: \$150,000

TERM: One year and four months

University of Da Nang

PURPOSE: To support the sustainable development of the new Learning Resource Center at the University of Da Nang by helping fund core services and providing seed funding for training and development.

AMOUNT: \$875,000

TERM: Three years

Out-of-Programme Grants

The Atlantic Philanthropies provide a few out-of-programme grants each year to organisations that further the general spirit of our mission but do not fall within our four specific programmes. In 2005, we approved 14 grants totalling \$15.6 million. The list of grantees follows:

NORTHERN IRELAND

Queen's University Belfast

PURPOSE: To assist an Omagh bomb victim to undertake a postgraduate course in music therapy.

AMOUNT: £20,000

TERM: Three years

REPUBLIC OF IRELAND

Trinity Foundation

PURPOSE: To enable Trinity College, Dublin, to cover certain costs of a programme to fund research in the Irish university system.

AMOUNT: €248,169

TERM: Six months

SOUTH AFRICA

University of the Western Cape

PURPOSE: To provide a discretionary fund to allow the Rector of the University of the Western Cape to pursue key institutional priorities.

AMOUNT: ZAR1,500,000

TERM: Three years

UNITED STATES

Chaminade University of Honolulu

PURPOSE: To fund the construction of the Library and Information Resource Center at Chaminade University of Honolulu. This centre will combine the services currently provided by the Sullivan Library and other dispersed information technology locations.

AMOUNT: \$5,000,000

TERM: Two years and two months

Educational Broadcasting Corporation

PURPOSE: To provide general support of *The NewsHour with Jim Lehrer* and enable long-term sustainability for MacNeil/Lehrer Productions.

AMOUNT: \$3,000,000

TERM: Two years and six months

Institute for International Sport

PURPOSE: To provide long-term support for the Institute of International Sport's programmes, including the World Scholar-Athlete Games, as well as aid in the development of new initiatives such as the Australian-Pacific Rim Scholar-Athlete Games.

AMOUNT: \$4,000,000

TERM: Ten years and three months

Ithaca Harbors, Inc.

PURPOSE: To develop an advisory group that would provide consulting services and products to other journal digitisation projects, while helping to establish standards, reduce mistakes and minimise duplication of effort.

AMOUNT: \$500,000

TERM: One year

New York University School of Law/National Center on Philanthropy and the Law

PURPOSE: To provide general operating support.

AMOUNT: \$100,000

TERM: Six months

Public Radio International

PURPOSE: To establish Public Interactive (PI)*, the leading integrated Application Service Provider (ASP) of online collaborative tools, community engagement technologies, content syndication services, and member and audience relationship management systems for the public broadcasting industry.

AMOUNT: \$1,000,000

TERM: One year

The Bridgespan Group

PURPOSE: To enhance selected grantees' opportunity for success by developing business plans with the Bridgespan Group's assistance.

AMOUNT: \$225,000

TERM: One year and six months

VIET NAM

U.S. Vietnam Trade Forum

PURPOSE: To assist Viet Nam in its accession to the World Trade Organization (WTO) by providing technical assistance for WTO negotiations.

AMOUNT: \$400,000

TERM: Two years and three months

OTHER — CUBA

University of Limerick Foundation*

PURPOSE: To fund a study by a student from Cuba at the University of Limerick.

AMOUNT: €22,000

TERM: Eight months

OTHER — EUROPE

openTrust

PURPOSE: To assist openDemocracy in becoming a sustainable business enterprise and a hub for reporting, discussion and participation committed to democracy and human rights by supporting its core operations and infrastructure.

AMOUNT: £425,000

TERM: Two years

The Landmark Trust

PURPOSE: To assist with the funding of developing a proposal for a children's book and animated TV series to promote Lundy Island.

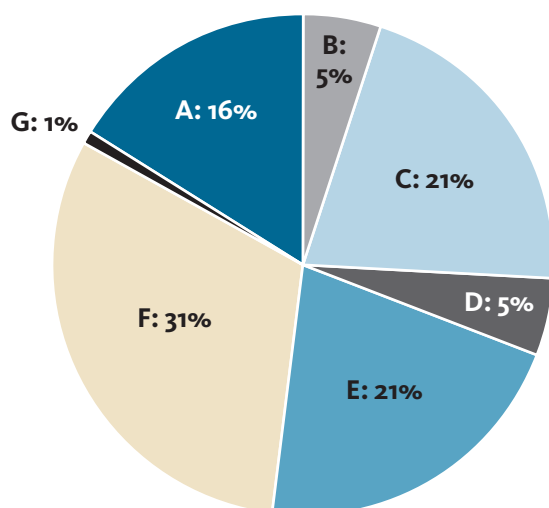
AMOUNT: £17,000

TERM: Eleven months

* The donor is The Atlantic Charitable Trust, a charitable trust registered with the Charity Commission for England and Wales.

Grants by Programme

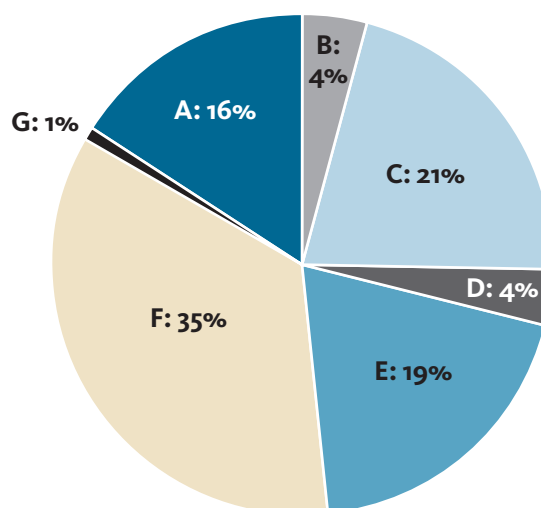
GRANTS BY PROGRAMME AREA
2005



TOTAL APPROVED: US\$288.9 MILLION

A Reconciliation & Human Rights \$46.6 million	E Disadvantaged Children & Youth \$61.9 million
B Out-of-Programme \$15.6 million	F Population Health \$88.6 million
C Ageing \$61.5 million	G Strategic Learning & Evaluation \$1.3 million
D Viet Nam Higher Education \$13.4 million	

GRANTS BY PROGRAMME AREA
2004 – 2005*



TOTAL APPROVED: US\$450 MILLION

A Reconciliation & Human Rights \$72 million	E Disadvantaged Children & Youth \$87 million
B Out-of-Programme \$16 million	F Population Health \$159 million
C Ageing \$95 million	G Strategic Learning & Evaluation \$2 million
D Viet Nam Higher Education \$19 million	

* Presented net of grant amendments



Le Nhan Phuong

Funding Policy

We do not consider unsolicited proposals for funding at Atlantic. Instead, we seek qualified organisations in Australia, Bermuda, Northern Ireland, the Republic of Ireland, South Africa, the United States and Viet Nam that share our philanthropic focus and invite them to submit an application for funding.

In selecting potential organisations for funding, we search for institutions that demonstrate strong organisational leadership, evidence of past and current successes, financial strength and the capacity to implement projects and evaluate their success. Prior to inviting an organisation to submit an application, we conduct extensive due diligence and, occasionally, seek external verification of our due diligence.

Before we award a grant, we also reach agreement with grantees on monitoring their progress and reporting on outcomes. Our aim is to be respectful of the independence of our grantees, to be supportive at all times, but also to be demanding in the achievement of agreed outcomes.

Group Services & Evaluation

At Atlantic, we are committed to following good foundation governance. In keeping with this commitment, our Board has adopted a code of ethics with strong safeguards to prevent actual or apparent impropriety. This code requires directors and staff to recuse themselves from deliberations about a programme grant proposal when they or their family members have a relationship with the prospective grantee. The code supplements this recusal duty by requiring public disclosure on our Web site, www.atlanticphilanthropies.org/about/governance/grantee, of these relationships for grants awarded. There is a similar requirement for directors and staff regarding vendors.

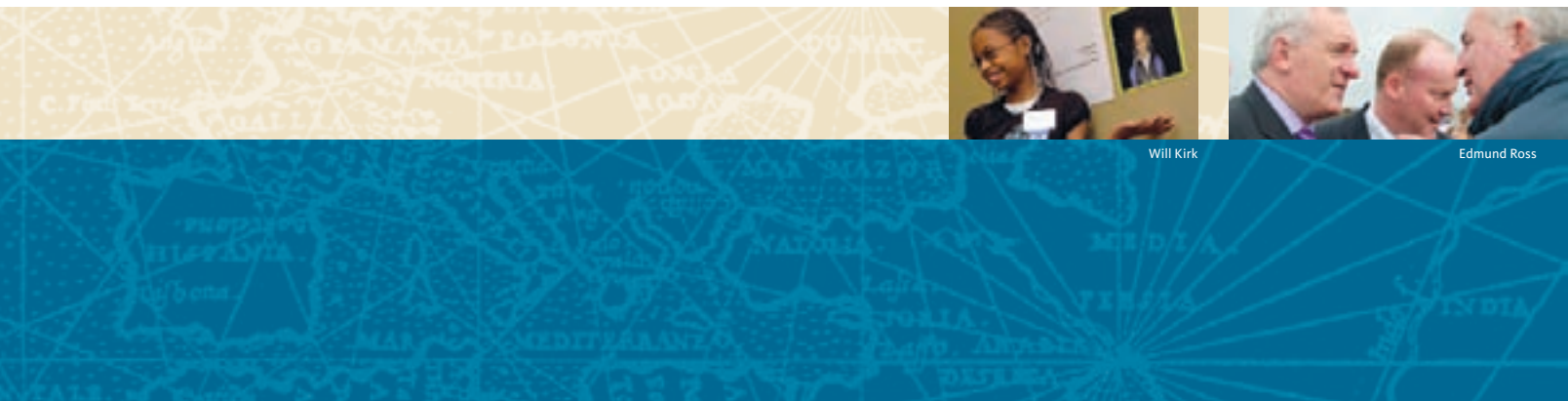
In 2004, the Board changed the terms of members from one-year terms to three-year terms, with one-third of the directors retiring each year but being eligible to stand for re-election. As a limited-lifetime organisation that plans to cease active grantmaking by 2016 and to spend down its endowment before 2020, these staggered Board terms are meant to enhance good governance planning and ensure continuity and stability as Atlantic moves to fulfil its mission.

Our goal in public and management reporting is to provide accurate, useful and timely information to the public and our Board. In so doing, we comply with the requirements of financial and accounting regulators.

We report to the public through our external annual report, our Web site and our financial statements. Providing our Board with the information they need, primarily for the quarterly Board and regular audit, compensation, investment and governance committee meetings, is a key part of effective governance. During 2005, we have continued to refine the materials, both on the initiative of management and to accommodate Board requests.

Internal controls and compliance have always been a priority at Atlantic. In today's environment, they are increasingly a focus for management, and we undertook a number of initiatives to strengthen our internal controls and compliance systems during 2005. We re-engaged Meteora Partners, a well-respected international firm, as our internal auditor. Our mandate to Meteora for 2006 includes review of our protocols for investment due diligence, budgeting, grants administration and capital investments, and an introduction to spend-down planning. In addition, the auditors will familiarise themselves with our grantmaking processes as a preliminary to a more in-depth review in 2007.

On the Operations side, our risk management projects included stronger separation of the investment selection and monitoring functions, a business continuity plan, new code of ethics training for staff, and a procurement policy for capital projects, leases and similar significant expenditures.



Will Kirk

Edmund Ross

HUMAN RESOURCES, COMMUNICATIONS, EVALUATIONS AND INFORMATION TECHNOLOGY

During 2005, we continued to invest in strengthening our human capital at Atlantic through recruiting, professional development and succession planning. Our primary objective was to recruit, develop, engage and promote employees who can contribute most to Atlantic's mission. Through our performance-appraisal process, we are capitalising on their strengths and addressing employees' development needs. In addition, we identified internal and external successors for critical positions.

Importantly, and with the continued support of our Board, we significantly increased our investment in the professional development of our employees. Our expanded internal training curriculum offered more than 30 courses covering grantmaking, management and professional development to all levels of employees.

As part of our objective to encourage our employees to give back to the community at large, we instituted a Volunteer Day policy. We now allow staff to volunteer their time, skills and services to recognised **charitable organisations that are meaningful to them**. To facilitate this effort, Atlantic grants three paid volunteer days to each employee annually.

In communications, we expanded internal media, began a strategic external communications plan, and worked with the programme staff and grantees to assess and address common needs. Key 2005 initiatives were publishing Atlantic's first annual report online, upgrading our external Web site, developing tools to help programme staff assess grantees' communications capacity, and restructuring and enhancing our internal Web site (intranet).

In 2005, the strategy and evaluation processes became fully operational. Our highly effective and well-integrated SLAE Team helped the grantees and programme executives to map out realistic objectives for the grants we support and to build useful evaluation plans. (See Strategic Learning & Evaluation, pages 4 and 5).

Information Technology initiatives included working with the grants administration function to launch our new grants administration database; delivering an automated pipeline tool to programme staff and management, which allows them to more efficiently report and analyse **forecasted grant data**; introducing a **Web-based team collaboration system** to improve communication and information sharing among geographically dispersed teams; and implementing a system that replicates critical business continuity data.

LOOKING AHEAD

During 2006, the Group Services & Evaluation Team will undertake a number of important initiatives, including:

- Moving the investment reporting (IR) function to New York from Bermuda, documenting key IR procedures, and identifying and addressing the control issues arising from the transition
- Overhauling the corporate structure of our investment subsidiaries to simplify our legal organisation, enhance cash and investment management efficiency, and simplify financial statement preparation
- Helping the Board and senior management frame and define the challenges of our spend down
- Focusing more specifically on issues of succession, leadership training and staff development, as we continue to work toward spend down
- Rolling out 20 cluster evaluations across all of our programmes and geographies by the end of 2006.

Financial Highlights

As of 31 December 2005, our net assets were approximately \$3.1 billion, which includes approximately \$580 million already committed to grantees. Atlantic's endowment consists of a diversified portfolio of absolute return strategies, private equity investments, global equities and bonds. We also own interests in hotels, resorts, health clubs and retailers through General Atlantic Group Limited (GAGL), a subsidiary. These businesses account for approximately 7.5 per cent of our net assets.^A

The financial highlights on the next page present the combined financial results of the seven charities and eight service companies that comprise The Atlantic Philanthropies. All are united by shared charitable objectives and overlapping management. The combined results also include the subsidiaries that hold the charities' investments and, through General Atlantic Group Limited, a number of operating businesses.

These highlights have been extracted from our Combined Financial Statements to provide a convenient and concise overview of our financial position and operating results. The Combined Financial Statements are available on our Web site at www.atlanticphilanthropies.org.

A. For accounting purposes, certain operating entities under United States generally accepted accounting principles (GAAP) must be recorded at cost. Atlantic, for investment purposes, re-values these entities at market value through an ongoing monitoring process of its endowment assets. GAGL represented 12 per cent of the endowment assets at year end.

B. The data for years 2005 and 2004 should be read in conjunction with the full audited combined financial statements and related footnotes. Data for years 2003, 2002, and 2001 are provided for comparative purposes only. Certain prior-period balances have been re-classified to conform to the current year's presentation.

C. U.S. GAAP stipulates that grant commitments requiring performance of certain conditions by the grantee be recorded separately from all other donation commitments as Conditional Donations, which must be carried off balance sheet until the conditions are substantially met.

D. Other Liabilities include such items as short-term financing transactions, short sales of marketable securities, general accounts payable and other liabilities including a term loan within an operating business.

E. Donations Expense represents the net change, year on year, arising from new donations committed, including conditional donations where the conditional terms have been substantially met during the period, net of adjustments for foreign exchange gains or losses and present value discounting.

F. Administrative Expenses represent general and administrative costs arising from charitable activities, internal expenses related to investment activities, including staff and staff related overheads, plus various consultancy fees.



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HIGHLIGHTS FROM THE COMBINED FINANCIAL STATEMENTS

In thousands of U.S. dollars, except percentages

Dec. 31, 2005^B Dec. 31, 2004^B Dec. 31, 2003^B Dec. 31, 2002^B Dec. 31, 2001^B

COMBINED STATEMENTS OF FINANCIAL POSITION

Assets

Investment Related Assets	\$ 4,102,118	\$ 3,992,560	\$ 3,830,566	\$ 3,623,666	\$ 4,434,808
Other Assets	246,367	232,413	259,023	268,271	258,513
	4,348,485	4,224,973	4,089,589	3,891,937	4,693,321

Liabilities

Donations Payable ^C	(484,997)	(546,040)	(540,041)	(684,556)	(681,030)
Investment Related Liabilities	(522,659)	(279,268)	(214,885)	(328,618)	(290,349)
Other Liabilities ^D	(98,707)	(97,186)	(104,668)	(153,259)	(185,891)
	(1,106,363)	(922,494)	(859,594)	(1,166,433)	(1,157,270)

Net Assets (Unrestricted)

	\$3,242,122	\$ 3,302,479	\$ 3,229,995	\$ 2,725,504	\$ 3,536,051
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Conditional Donations^C

	(95,390)	(123,913)	(268,529)	(216,073)	(173,720)
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Net Assets (After Conditional Donations)

	\$3,146,732	\$ 3,178,566	\$ 2,961,466	\$ 2,509,431	\$ 3,362,331
Total Investment Related Assets and Liabilities	\$3,579,459	\$ 3,713,292	\$ 3,615,681	\$ 3,295,048	\$ 4,144,459
Total Donations and Conditional Donations Payable ^C	\$ 580,387	\$ 669,953	\$ 808,570	\$ 900,629	\$ 854,750
Donations Payable as a Percentage of Assets	11.2%	12.9%	13.2%	17.6%	14.5%
Donations and Conditional Donations Payable as a Percentage of Assets	13.3%	15.9%	19.8%	23.1%	18.2%

COMBINED STATEMENTS OF REVENUE AND EXPENSES

Operating and Investing Transactions

Operating Business Activity (Net of Taxes and Minority Interest)	\$ 51	\$ (6,630)	\$ (133)	\$ (2,067)	\$ (24,122)
Realized Income from Investing Activities	189,907	275,181	416,326	75,543	33,917
Foreign Exchange Translation Gain (Loss)	(13,890)	8,332	12,875	12,915	(2,916)
Realized Income from Operating and Investing Activities	176,068	276,883	429,068	86,391	6,879
Change in Unrealized Gains (Losses) from Investing Activities	88,354	145,053	386,395	(506,391)	(229,773)
	264,422	421,936	815,463	(420,000)	(222,894)

Donations and Administrative Expenses

Donations Expense ^E	(287,038)	(315,340)	(282,211)	(364,857)	(315,962)
Administrative Expenses ^F	(37,741)	(34,112)	(28,761)	(25,690)	(21,802)
	(324,779)	(349,452)	(310,972)	(390,547)	(337,764)

Increase (Decrease) in Net Assets	\$ (60,357)	\$ 72,484	\$ 504,491	\$ (810,547)	\$ (560,658)
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Administrative Expenses as a Percentage of Donations Expense	13%	11%	10%	7%	7%
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Investment Performance

As of 31 December 2005, The Atlantic Philanthropies' endowment totalled approximately \$3.9 billion. The endowment consists of a diversified portfolio of absolute return strategies, private equity investments, global equities and bonds, as well as interests, via a subsidiary, in hotels, resorts, health clubs and retailers. Atlantic's total portfolio produced an 8.9 per cent return in 2005, compared to its benchmark performance of 8.6 per cent. The absolute return portfolio generated a 9.1 per cent return, compared to its benchmark performance of 7.6 per cent.

Atlantic's limited-life nature requires an unconventional portfolio structure. In particular, the portfolio needs both to protect capital and generate a high return, a combination which is difficult to achieve using only conventional assets such as equities. The current portfolio is therefore structured as follows:

- A core allocation to a diversified portfolio of absolute return strategies. These strategies derive their returns primarily from the skill of the fund manager. Such strategies have little history on which to base assumptions about future return and risk characteristics and have recently experienced a flood of new money, which will inevitably drive down returns. Nevertheless, Atlantic believes that a diversified portfolio of such strategies, held as a major component of its endowment, should produce the combination of return and risk needed to meet its requirements. In pursuing such an allocation, the ability to research and access the highest quality managers is essential.



Le Nhan Phuong

At end of December 2005

- A well-diversified portfolio of conventional assets is also held as a good complement and partial hedge against the systemic risks inherent in absolute return strategies. Conventional asset classes (global equities, global bonds, commodities) derive their returns from broad economic trends and risk **premiuma and are not** dependent on manager skill. They are also less exposed to some of the systemic risks that might affect the hedge fund industry.
- A portfolio of private equity investments is held to boost long-term returns. An allocation to a high returning, but illiquid, asset class, such as private equity, makes sense to boost returns as long as a sufficiently long life remains and the highest quality managers can be accessed.

- A. The Absolute Return segment is a portfolio of hedge funds diversified by strategy and by region. The benchmark for the Absolute Return segment is cash + 4.5 per cent per annum.
- B. The Conventional Asset Classes segment is a diversified portfolio of passive investments in global equities, global bonds and commodities.
- C. The Legacy Operating Businesses are managed through General Atlantic Group Limited and include resort hotels, retailers, sports and health clubs, and real estate developments.



BOARD AND EXECUTIVE MANAGEMENT

DIRECTORS*

Harvey P. Dale, Founding President

University Professor of Philanthropy and the Law,
New York University School of Law
Director, National Center on Philanthropy and the Law

Christine V. Downton**

Former Partner, Pareto Partners

Charles F. Feeney

Founding Chairman

John R. Healy

Chief Executive Officer and President

Sara Lawrence-Lightfoot

Professor of Education, Harvard University

Elizabeth J. McCormack

Advisor, Rockefeller Family & Associates

Thomas N. Mitchell

Director, Trinity Foundation
Former Provost, Trinity College Dublin

Frank Mutch***

Former Partner, Conyers Dill & Pearman, Bermuda

Frank H. T. Rhodes, Chairman

Professor of Geological Sciences and President Emeritus,
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Frederick A. O. Schwarz, Jr.

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Senior Counsel, The Brennan Center for Justice
Chair, New York City Campaign Finance Board

Peter Smitham

Chairman of Actis
Partner in Permira

Michael I. Sovern

President Emeritus and Chancellor Kent Professor of Law,
Columbia University, New York

Cummings V. Zuill

Senior Vice President, Bank of Bermuda, Retired
Bermuda Charity Commissioner

* Directors of The Atlantic Foundation, which is the
largest charitable fund within The Atlantic Philanthropies.

** Will be taking a one-year leave from the Board, beginning in September 2006,
to assume leadership of our Population Health Programme in South Africa.

*** Retired from the Board in June 2006.

EXECUTIVE MANAGEMENT

John R. Healy

Chief Executive Officer and President

Colin McCrea

Senior Vice President

Deborah R. Phillips

Senior Vice President



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