



Research Report

REBECCA L. WOLFE, ELAINE LIN WANG, BENJAMIN K. MASTER

Encouraging Strategic Investments in Global Education

A Case Study of the Global Business Coalition for Education's Efforts to Harness Corporate Giving



KEY FINDINGS

- To increase strategic corporate investment in education, the Global Business Coalition for Education (GBC-Education) supports its members with three main strategies and services: (1) **creating opportunities for members to connect and share strategies**; (2) **providing resources and guidance to help companies identify, refine, and streamline their education-related investment strategies**; and (3) **leveraging relationships with trusted brokers to help companies reach beneficiaries with the most need**.
- GBC-Education faces three main challenges to promoting more efficient and effective investments in education: (1) **sustaining companies' long-term focus on strategic investments in education**, (2) **making the business case for investing in early childhood education**, and (3) **aligning strategic giving efforts across companies** that have vastly different priorities, constraints, capabilities, and structures.
- GBC-Education's example highlights insights for other organizations working to support strategic corporate investments in education, including (1) the **potential value of providing easy-to-digest evidence tailored to companies' core values** and (2) **the importance of balancing business and end-recipient priorities** by maintaining ties with diverse stakeholders.

A 2023 United Nations Educational, Scientific and Cultural Organization (UNESCO) report suggests that global and regional efforts to achieve educational equity are not keeping pace with the demands of a rapidly changing global economy (UNESCO, 2023a). Some estimates project that, by 2030, less than half of the world's youth will possess the basic skills needed for success in the workplace (Global Business Coalition for Education [GBC-Education], 2019; International Commission on Financing Global Education Opportunity, 2016). UNESCO estimates that achieving benchmarks for quality education in low- and middle-income countries will cost upward of \$3.7 trillion and predicts an annual "financing gap" of nearly \$100 billion between 2023 and 2030 (UNESCO, 2023b). Providing schools in low- and middle-income countries with the technology, resources, and training to

support digital education would cost an additional \$183 billion (UNESCO, 2023b).

On the premise that companies stand to benefit from a highly educated and technically skilled global workforce, some advocates have argued for increased and more-strategic investment in education from the business sector (Dattani, Still, and Pota, 2015; Winthrop et al., 2013).¹ Companies contribute roughly \$2.6 billion—or 13 percent of their total corporate social responsibility (CSR) budgets—toward global education initiatives each year (Dattani, Still, and Pota, 2015). Some experts suggest that these contributions fall short of overall need, fail to reach the most vulnerable student groups, and lack coordination (Dattani, Still, and Pota, 2015; van Fleet, 2011).

Calls for businesses to assume more responsibility for education are part of a broader trend to increase corporate social investment by connecting long-term corporate prosperity to business practices that promote social and environmental well-being (Levy and Kaplan, 2007; Moran and Branigan, 2015). Although the expansion of corporate influence in social areas is considered by many to be controversial, as Levy and Kaplan (2007) explains, the resources and influence wielded by large corporations has generated considerable interest in determining how those resources could be leveraged to improve society.

GBC-Education is one organization that seeks to increase strategic investment from the private

Abbreviations

CSR	corporate social responsibility
GBC-Education	Global Business Coalition for Education
HP	HP Inc.
EE	Education Equity
ESG	environment, social, and governance
NGO	nongovernmental organization
SE	Schneider Electric
UNESCO	United Nations Educational, Scientific and Cultural Organization

Key Terms and Organizations

The Global Business Coalition for Education (GBC-Education) is a 501(c)(3) nonprofit that works with the global business community to improve education quality and access by identifying corporate investments that are likely to have the greatest impact. GBC-Education was founded in 2012 by Theirworld, which is a charity based in the United Kingdom.

Schneider Electric, HP Inc., SAP, and Ancestry are multinational companies and members of GBC-Education.

Environment, social, and governance (ESG) refers to a company's established practices or metrics for ethical, sustainable, and environmentally conscious behavior.

Corporate social responsibility (CSR) refers to a business model wherein companies operate in ways (i.e., engage in initiatives or strategies) that support positive societal and environmental impact.

The *ESG + Education Playbook* is a resource developed by GBC-Education to help global companies improve their ESG performance through strategic investments in education.

sector in education. According to GBC-Education, “Investment in education, human development, and training is not only a necessity for today’s workforce but an essential investment for future generations” (GBC-Education, undated-b). GBC-Education posits that strategic investment in education—when aligned with companies’ CSR goals and, relatedly, with their environmental, social, and governance (ESG) investments—could go a long way toward reducing global educational inequities. As a partner of the BHP Foundation’s Education Equity (EE) program, GBC-Education is one of five global nongovernmental organizations (NGOs) contributing to the BHP Foundation’s understanding of how the use of evidence and innovation in education can be scaled up to support global educational equity.

This report is one in a series of descriptive case studies that RAND is compiling to demonstrate the implementation of single-partner initiatives that are illustrative of the EE program’s original theory of change, which was in effect from 2018 to 2023 (see the appendix).² The purpose of this case study is to document some of the strategies that GBC-Education is using to increase corporate investment in education and the challenges it faces in doing so. Our primary audience is the BHP Foundation and GBC-Education; however, this report may have relevance for other organizations seeking to increase strategic investment in education. In this report, we draw on interviews we conducted between fall 2022 and fall 2023 with GBC-Education personnel and representatives from four companies that are members of GBC-Education’s *coalition*, or network of companies that are committed to “supporting the [United

Nations’] Sustainable Development Goal of equitable and inclusive quality education” (GBC-Education, undated-b).³ For details about our methods and the limitations of this study, please see the “Summary of Methods” box at the end of this report.

We begin this report with an overview of the mission and goals of GBC-Education followed by a brief description of GBC-Education’s relationship with each of the four member organizations whose representatives we interviewed. We then describe three strategies that GBC-Education implemented with these organizations. The strategies that we attribute to GBC-Education emerged from our interviews. We then explore some of the challenges that GBC-Education has reported experiencing as it seeks to increase strategic decisionmaking around corporate investment in education. Because this work is funded by the BHP Foundation, we map GBC-Education’s strategies back onto the BHP Foundation’s EE program theory of change. Finally, we offer takeaways that could be applicable for similar organizations.

Overview of GBC-Education’s Efforts to Increase Strategic Corporate Investments in Education

GBC-Education was founded in 2012 with the goal of “bring[ing] together the business community in support of the [UN’s] Millennium Development Goals” (GBC-Education, 2019). GBC-Education describes itself as a “movement of businesses committed to ending the global education crisis and unleashing the

potential of the next generation” (GBC-Education, 2019). Leveraging its expertise in education and business, GBC-Education aspires to serve as the “social impact advisor” for the business community by helping to identify investments and partnerships that could have the greatest impact on the global education landscape. For instance, consider one narrow example of how corporate investment in education could be more efficient and effective. Without inter-organizational coordination, donations of technological devices (such as computers) to schools in sub-Saharan African countries may not reach the intended beneficiaries. Donated goods must cross borders and land in the hands of trusted organizations responsible for distributing those goods in the destination country. Processes must be in place for safe and equitable distribution. Moreover, donated devices may sit idle if essential infrastructure—such as electricity or broadband—is unavailable. In this example, GBC-Education would apply its understanding of the educational needs of regional and local populations to identify and connect companies that have relevant resources and capacity—for example, technology companies and those specializing in logistics—to this effort. Furthermore, it would identify actors on the ground who are essential to achieving the desired outcome, such as the ministers of education.

In 2022, as part of the BHP Foundation’s EE program-funded work, GBC-Education designed and implemented a business model consisting of four tiers of services designed to “support the business community more effectively support global education equity” (GBC-Education, 2023a). Engagement with the first tier, known as the coalition, is fee-free. All companies that engage with GBC-Education are part of the coalition and have access to GBC-Education’s expertise, selected resources, events, and networks. Since early 2023, the two middle tiers have been consolidated into one tier at which companies receive customized, strategic advice from GBC-Education experts who help plan, execute, and measure education impact initiatives. Companies in the fourth tier have the opportunity to support one of GBC-Education’s existing projects or campaigns or “partner to launch a new initiative addressing the global education crisis” (GBC-Education, 2023a).

As of fall 2023, GBC-Education works with 70 team members from approximately 50 unique companies (GBC-Education, 2023b). GBC-Education supports personnel from ESG impact, CSR, and development teams (GBC-Education, undated-a). For this case study, we spoke with representatives from four GBC-Education member companies, selected by GBC-Education, whose partnerships GBC-Education described as emblematic of its work. In the remainder of this section, we provide brief descriptions of the education-related philanthropic and investment work of each of these four companies and their relationships with GBC-Education. The purpose of these descriptions is to convey the breadth of the organizations with which GBC-Education works and the various means through which GBC-Education supports its member organizations. In later sections of this report, we discuss aspects of GBC-Education’s work with these partners in more detail.

Schneider Electric (SE) is a Fortune Global 500 company headquartered in France. Since 2009, the SE Foundation has supported the development of technical and vocational training programs in more than 45 countries. SE’s interest in promoting upskilling, innovation, and entrepreneurship in the energy sector stems from the company’s history and long-term commitment to its ESG strategy. According to one representative, SE established its own school in France as early as 1929 to address the same issues that the company believes are affecting the workforce today: underinvestment in technical and vocational training. In terms of its education-related investments, one of SE’s signature initiatives is its Youth Education and Entrepreneurship, program, which aims to train 1 million young people in energy sector skills by 2025 (SE, 2022). SE has been a member of GBC-Education’s coalition since 2018 and has primarily benefited from its membership as a participant and contributor during networking opportunities brokered by GBC-Education.

SAP, another Fortune Global 500 company, produces enterprise application software. It is headquartered in Germany. As part of its broader CSR portfolio, SAP supports a variety of digital skill-building and worker-readiness opportunities for youth ages 16 to 24 across the globe (SAP, 2022). As one representative explained, SAP is focused on sup-

porting initiatives that lead to greater employability and worker readiness by boosting skill development in the communities that SAP supports. SAP joined GBC-Education's coalition in 2020. GBC-Education has worked with representatives from SAP on several projects, including the creation of a framework to help SAP synchronize and optimize its regional investments in local skill-building initiatives.

Ancestry joined GBC-Education's coalition in 2022. Headquartered in the United States, Ancestry is an international company that provides users with tools to explore their history and genealogy (Ancestry, undated). A key pillar of Ancestry's CSR program is education and its commitment to "[e]mpowering the next generation of history makers" (Ancestry, 2022, p. 4). One way that Ancestry is working toward its vision is through its signature AncestryClassroom™ program, through which Ancestry provides kindergarten-through-12th-grade educators and students with no-cost access to classroom resources and historical records. Ancestry aims to reach 10 million students globally by 2025 (Ancestry, 2022). According to the representatives with whom we spoke, Ancestry helped sponsor Theirworld's Global Youth Ambassador program in 2023 as part of its work with GBC-Education. Additionally, GBC-Education facilitated a learning session about global educational disparities with more than 200 Ancestry employees during Ancestry's global days of service.

HP Inc. (HP) is a U.S.-based Fortune 500 company that produces information technology, such as printers and personal computers. As part of a large umbrella initiative, HP's north star goal is to "[a]ccelerate digital equity for 150 million people by 2030" (HP, 2022, p. 107). For HP, this means "[p]rovid[ing] access to hardware, connectivity, digital literacy, and quality, relevant content that enhances education, supports healthcare innovation, and accelerated economic opportunity" (HP, 2022, p. 107). HP has been a member of GBC-Education's coalition since 2012. In terms of education-related investments, one of the key projects that GBC-Education has supported is HP's distribution of more than 74,000 laptops to refugee and displaced Ukrainians from 2022 to 2023 (GBC-Education, 2022).

Selected Strategies to Support Strategic Corporate Investment in Education

As part of its work with the BHP Foundation, GBC-Education is creating new resources and refining its practices to promote more-informed and more-impactful corporate investments in education (GBC-Education, 2019). From our interviews, we identified three broad strategies that GBC-Education implemented with some of its member partners between 2022 and 2023 in support of its goal to reduce global educational inequality by increasing business investments in education. In this section, we discuss these strategies and provide illustrative examples of each strategy in practice. Our intention is not to provide a comprehensive review or critique of GBC-Education's business model. Rather, our goal is to provide insight into some of the ways that GBC-Education motivates corporate strategic investment in education. We situate these strategies within the broader literature about corporate investment and philanthropic giving, although we do not imply that GBC-Education consulted or was influenced by such literature. For more information on GBC-Education and its strategic model, please visit GBC-Education's website (GBC-Education, undated-a).

Strategy 1: Provide Opportunities for Peer-to-Peer Learning

GBC-Education refers to itself as "one of the world's most effective forums for connecting businesses making an impact on the lives of young people through education" (GBC-Education, undated-b). To facilitate connections between its members, GBC-Education convenes workshops, internal roundtables with selected members, and larger events with all its members. For example, GBC-Education regularly attends and hosts sessions for member organizations during the UN General Assembly ("UNGA Week"). Two of the company representatives with whom we spoke said that they regularly attended GBC-Education events and networking functions. A third representative said that she was looking forward to more opportunities to connect with peer organizations. Another added that being part of the large

“I think [some] organizations are so inspiring and are really moving the needle for education access. We want to learn from leaders in the space if we are part of this coalition.”

—Company representative

network that is GBC-Education “adds a level of credibility when you have multiple people that can connect dots on opportunities and initiatives that you are working on.”

The literature confirms the possibility that creating peer-to-peer opportunities for members from similar sectors to interact and learn from one another could lead to more strategic giving, depending on the decisionmaking power of the employees that attend such networking events (Williams Group, 2004). According to systematic reviews by Gautier and Pache (2015) and Cha and Rajadhyaksha (2021), multiple studies have demonstrated that a company’s relationships with other companies—coupled with market trends and other factors—can result in similar giving patterns across companies in similar sectors. GBC-Education has noticed that member partners in similar sectors tend to have similar interests and concerns related to investments in education, which is a pattern that is anticipated in the literature. During our interviews, representatives from GBC-Education shared that coalition members often express interest in identifying synergies and collaborating with other companies to enhance their social impact, which is the type of momentum that GBC-Education seeks to channel.

To illustrate one company member’s perceptions of the value of GBC-Education’s networking opportunities, we describe one example from our interview with a representative from SE in the box on the next

page. Not all the representatives with whom we spoke engaged in GBC-Education’s networking opportunities to this degree; however, we selected this case as an example of the types of collaboration that GBC-Education works to foster.

Strategy 2: Provide Resources and Guidance to Help Companies Identify, Refine, and Streamline Their Investment Strategies

How companies achieve their CSR goals and make decisions about philanthropic giving depends on a myriad of factors. In particular, CEOs and top-level managers can wield tremendous influence over their companies’ giving practices (Cha and Rajadhyaksha, 2021). However, when it comes to understanding the education landscape, according to GBC-Education and some literature, corporate decisionmakers often lack the tools and resources needed to make informed decisions about how to get the most impact out of their investments (GBC-Education, 2023a). For example, funders frequently encounter difficulties in obtaining quality and relevant data to make informed decisions about their investments, struggle to determine the implications of the information that they are able to access, or lack the means to conduct meaningful impact assessments of their existing investments (Greenhalgh and Montgomery, 2020).

All the company representatives we spoke with affirmed that GBC-Education provided their organizations with trustworthy information that they can use—and sometimes have used—to support vision-setting or strategic decisionmaking about their companies’ investments in education. As one representative explained, “Where we found value with GBC-Education, as well as other partners, was thinking about what the most critical need [is] right now that we can fill.” This representative went on to explain that GBC-Education, with its knowledge and resources, has a “bird’s eye view” of the education landscape that—when leveraged—has enabled her company to translate its investments into higher social impact. Another representative explained that she views GBC-Education “as a resource to understand the greatest areas of need.”

One Representative’s Perspective of the Broader GBC-Education Coalition: “If You Want to Be More Strategic, You Need to Learn from the Sector and Others”

When we asked representatives about the value of partnering with GBC-Education, one representative from SE described the opportunities she has to network with social impact leaders from other companies as a key benefit. This representative reported participating as a coalition member in topic-focused roundtables with other coalition members and engaging in events, such as Climate Week. As this representative explained, “It’s quite innovative to have a coalition that brings companies together to discuss [strategic giving in education]. . . . It is a good way to gather companies that are working on the subjects to try to discuss more about what they are doing and learn from each other.”

This representative shared that connecting and collaborating with other companies from the GBC-Education coalition involved a learning curve. According to this representative, compared with SE, relatively fewer companies in the coalition are as invested in technical and vocational training. However, as GBC-Education has continued to grow and reorganize, SE team members have recognized new ways to contribute and learn as members of the coalition. As the representative from SE explained, most companies in the coalition share an interest in exploring big-picture, overarching topics that span their companies’ overall CSR and ESG portfolios. For example, many companies are interested in developing better impact measurements of their social giving initiatives and in aligning these initiatives with global standards. According to the representative from SE, her team greatly benefits from engaging in conversations about these more general topics with other companies both across and outside SE’s sector. In fact, using feedback that it received from other companies, SE is currently exploring changes to its existing impact measurement standards as part of its continuous efforts to improve.

One way that GBC-Education attempts to meet companies’ critical need for evidence to motivate corporate giving around shared goals is through a suite of member-only resources (e.g., guidebooks, slide decks, presentations). These resources frame the global conversation about education disparities in terms of simple economic indicators and include tools to help companies quantify the benefits of strategic investment in key areas of need. With these resources, GBC-Education works to demonstrate the importance of investment that begins in the early years of a child’s education to ensure that—all along the way—children are being set up to thrive. Thus, with these resources and the other supports that it offers, GBC-Education aims to nudge companies toward investments in three strategic areas: (1) best start in life, (2) safe place to learn, and (3) skills for the future. GBC-Education hypothesizes that investments in these areas will lead to the greatest long-term positive changes in education.

The corporate representatives with whom we spoke reported a variety of uses for GBC-Education’s member resources and the information provided to them through their private consultations with GBC-Education. In the boxes below, drawing on our con-

“We still use some of [GBC-Education’s] resources when we need to provide proof of why education [is critical]. We can lean on those resources and say, ‘Hey, there are outside entities that are experts in this area that are telling us what the needs are.’ . . . It gives us a clear and trusted resource to say, ‘Here are the needs and here are the opportunities.’”

—Company representative

versations with representatives from all four companies, we describe examples of some of the resources GBC-Education has created and how companies engage with these resources.

GBC-Education occasionally builds customized tools to help its members improve their investments in education or resolve challenges specific to unique regional or local contexts, depending on the needs of its corporate partners. For one example of a customized tool GBC-Education constructed for SAP, see the box on the next page.

Strategy 3: Leveraging Relationships with Trusted Brokers to Help Companies Reach Beneficiaries with the Most Need

Another challenge faced by corporate philanthropic teams is identifying trustworthy beneficiaries in saturated or fragmented markets (Greenhalgh and Montgomery, 2020). Our interviews suggest that this challenge may be especially acute during times of crisis, when the international business commu-

Company Representatives Said They Appreciate Resources That Make the Business Case for Investing in Education

To demonstrate how companies can leverage strategic investments to reduce educational disparities—and boost their CSR portfolios—GBC-Education provides guidebooks and presentations with easy-to-understand and hard-to-forget data from the World Bank and UNESCO (GBC-Education, undated-a). These resources contain facts, such as the following:

- “Without drastic action and investment, the 2030 forecast is that 825 million children and youth, or more than one half of young people worldwide, will not have basic reading and math skills to be productive in the workforce or participate in society” (GBC-Education, undated-b, p. 10).
- “Of the youngest and most disadvantaged children, 175 million are missing out on early childhood education, a critical part of development (GBC-Education, undated-b, p. 10).

Nearly all of the representatives we spoke with shared how these statistics informed or could inform corporate decisionmaking about strategic giving. For example, one representative from SAP shared how his team applied data from GBC-Education during a strategy refresh of their company’s core investment strategies. As this representative explained, although SAP has always prioritized education, a presentation by GBC-Education contributed to its decision to broaden its focus from “digital skills” to “future skills,” with an increased focus on workforce readiness. In another example, a representative from Ancestry explained how GBC-Education’s data provided a reality check about access challenges that students face in countries with limited school resources. As this representative explained, “Having the help and the data they provide is helpful going into conversations with partners, leadership, to show the strategy behind any additional education investment.”

A Tool for Measuring Impact? Company Representatives Said, “Finally”

GBC-Education provides generalized tools to help its members quantify impact. One of these tools, the *ESG + Education Playbook* (GBC-Education, 2023c), identifies 14 ESG topics related to education and provides associated metrics from Sustainability Accountability Standards Board and Global Reporting Initiative frameworks. The purpose of this resource is to “connect the dots” for companies as to ways in which they can invest in education that directly bolster their own business goals. Nearly all the representatives with whom we spoke were enthusiastic about the playbook. Two described future plans to leverage the playbook, which had just been released at the time of our interviews. For example, Ancestry hoped to use the playbook to update its social investment goals for 2025. Meanwhile, SE was considering possible ways to incorporate some of the international metrics proposed in the playbook that link human rights and education-related actions into its work.

A New Customized Framework to Inform Regional Partnerships, Helping One Member “Stay as True to the Strategy as We Can with Flexibility Around Local Needs”

One representative from SAP’s CSR team shared that one key challenge his team has experienced is maintaining coherence and resource equity across its global CSR programming without compromising local autonomy. As an example, this representative shared that, over the past decade, SAP has invested in multiple regional partnerships to support a variety of coding initiatives. According to the SAP representative, although each program is successful in its own way, the challenge his team faced was that each program was resource-intensive and based on different “inputs from local ministries, regional partners, and [regional] CSR leads.” SAP was interested in creating more-cohesive and less labor-intensive programming while maintaining local choice and autonomy. As this representative explained, it is critically important that whatever programs his team supports are grounded in the needs of local populations and partners, which can vary significantly across different regions. To resolve this tension, SAP worked with GBC-Education to develop a framework to help its regional teams establish more-impactful, less resource-intensive local partnerships. This representative explained that the framework, which functions as a checklist, is intended to help regional decisionmakers build partnerships that align with SAP’s global CSR priorities while also providing local actors with sufficient flexibility to define the parameters of SAP’s unique coding initiative depending on local contextual factors.

nity looks to rally around local emergency response capabilities, or when corporate teams have leftover or extra earmarked funds and are looking to make a single investment. As one company representative explained, without insider guidance and coordination, it can be challenging for companies to identify the right beneficiaries. This representative went on to say that their company is going for impact and that the kind of direct support GBC-Education offers in making sure that investments reach the most vulnerable populations is what they are looking for in a partner.

Because of its global network—which includes large international NGOs, UN agencies, and government officials—GBC-Education can provide strategic guidance to its corporate partners about beneficiaries they can trust. GBC-Education maintains its long-standing relationships with large and impactful beneficiaries through direct partnerships, financial support, and board membership on initiatives, such as the Global Partnership for Education (GBC-Education, 2019). In this way, GBC-Education functions as what some authors have referred to as “a crucial conduit” between corporate philanthropic teams and stakeholders on the ground (Greenhalgh and Montgomery, 2020).

During our interviews, we heard two different examples of ways that GBC-Education worked with its broader network to identify beneficiaries for one-

time philanthropic donations in education—both of which may lead to continued collaboration efforts or future long-term engagement. We describe these in the boxes on the next pages.

“Something that [GBC-Education] shared during a presentation was around these financial investment opportunities that helped the funding you provide scale bigger than just the funding alone. Everyone is pulling money in, so you can get economies of scale. That stuck with us.”

—Company representative

“We have our north star. What I am looking for is who can help us get there. Who truly gets it? . . . We are going after the impact. That is the partnership I seek to have.”

—Company representative

Challenges

GBC-Education has made strides to enhance the quality and volume of information between the education sector and corporate giving teams. Nevertheless, our interviews suggest that GBC-Education faces the following three main challenges:

- **Sustaining companies’ long-term focus on strategic investments in education is an ongoing challenge.** GBC-Education has experimented with different approaches to helping companies reframe their perspectives about the benefits of investing in education. As one representative from GBC-Education explained, “Our whole mandate from BHP is to make some shift in how companies are thinking about education investments internally. How [do we] keep this in corporate boardrooms and do something different? We feel like this is the biggest nut to crack.”

According to this representative, convincing companies to invest in education “because it is the nice thing to do” simply is not enough. GBC-Education is hopeful that, by providing tools that demonstrate how investment in education ties back to their corporate goals for ESG or CSR (i.e., make the business case for investment in education), it will be able to increase sustained corporate interest in supporting education. Some authors have called out similar approaches as recognizing that business investment in social impact efforts is both the right and the smart thing to do (Bhattacharya, 2019; Smith, 2003).

- **Making a business case for investment in early childhood education can be especially challenging, depending on the needs and interests of the company.** As mentioned previously, GBC-Education aims to nudge companies toward investments in three strategic areas: (1) best start in life, (2) safe place to learn, and (3) skills for the future. Although GBC-Education aims to demonstrate both the business and philanthropic case for investments in these areas, as one representative explained, it can be a challenge to help “companies see the benefit of investing in education earlier than the ‘skills development’ phase, which is easier to make the business case for because it fits into workforce development strategies.” That is, getting buy-in from companies to invest in the whole cycle (i.e., from learning to earning) poses an ongoing

Ancestry’s Decision to Support the Global Youth Ambassadors and How It Brought Its Employees on Board

In 2022, Ancestry reached out to GBC-Education to discuss ways in which the company could support global education initiatives aligned with Ancestry’s vision and mission. After careful consideration, Ancestry decided to invest in Global Youth Ambassadors, which is a program operated by Theirworld that equips promising youth across the globe for engagement in global education spaces. Theirworld is GBC-Education’s parent organization. Although GBC-Education’s mission is not to promote Theirworld, in this case, Ancestry’s support of the Global Youth Ambassadors program—as a means of supporting the next generation of history makers—“was a clicking point,” as one representative from GBC-Education explained. As part of this partnership, GBC-Education supported Ancestry’s Global Day of Service with opportunities for employees to hear from a global youth ambassador and to learn about challenges across global education. In response, nearly 200 employees signed a petition in support of Theirworld’s campaign to improve early childhood outcomes.

How GBC-Education Supported HP in Distributing More Than 74,000 Laptops to Ukrainian Refugees

One representative from HP described how its partnership with GBC-Education enabled HP to distribute more than 74,000 laptops to refugee and displaced Ukrainians from fall 2022 through summer 2023. This initiative, which was huge in scope, was initiated by HP. In addition to the sheer logistical challenges involved in the distribution of such a large number of laptops, HP wanted to ensure that the laptops were being distributed equitably and efficiently. The representative from HP explained that the value of GBC-Education was its knowledge and deep connections with government officials and NGOs. Because of those relationships, GBC-Education was able to streamline the logistics of distributing the many devices and do so in ways that representatives said, “moved the needle” on digital equity in the middle of a warzone. More information about this effort can be viewed on GBC-Education’s website (GBC-Education, undated-a).

challenge because the link between early childhood education and workforce readiness may be less apparent.

- **Aligning strategic giving across companies with vastly different priorities, constraints, capabilities, and structures requires a strategic balancing act.** As the old adage goes, when it comes to corporate giving and social responsibility, “one size does not fit all” (Argandoña and Hoivik, 2009). To keep and sustain interest, GBC-Education must make its services relevant to each of its clients and meet them where they are, while simultaneously guiding them toward higher-impact areas. Whereas some companies may be receptive to realigning their goals for corporate giving around GBC-Education’s three priorities, other companies have less flexibility. Likewise, although some companies want to be more hands on or in the trenches, others are interested in giving larger sums of money to GBC-Education to carry out a project in service of their goals. Moreover, companies have different needs for support that may conflict. For example, companies with more internal expertise and resources may have less need for workshops or roundtables with other organizations. In contrast, companies with smaller CSR teams may benefit greatly from such opportunities to network with organizations that have more-developed initiatives already in place.

Relevance to the BHP Foundation’s Education Equity Program Theory of Change

This case study is one in a series intended to illustrate aspects of the BHP Foundation’s EE program’s original 2018–2023 theory of change (see the appendix). In this section, we connect GBC-Education’s efforts to support businesses to give strategically to education with the BHP Foundation’s EE program theory of change.

One of GBC-Education’s primary contributions pertains to **gathering and disseminating evidence that supports improvements in global education.** GBC-Education does so in a few ways. First, as our interviewees have indicated, GBC-Education has produced reports and delivered presentations that provide credible evidence and statistics on the global education landscape and how corporate philanthropy can play a role in shifting the narrative and shaping the future. GBC-Education deploys such resources to recruit and engage members in the coalition; furthermore, member organizations have drawn on the data and evidence to support strategic decision-making. Second, beyond disseminating evidence for the premise that more investments in education are essential, GBC-Education publishes documents, such as the *ESG + Education Playbook*, that are designed to help companies bridge the gap between intention and action.

GBC-Education’s hands-on consultations and partnerships with companies have the potential to help companies **develop their capacities to leverage evidence or resources** in service of more-strategic

giving. That is, in working with coalition members, GBC-Education aims to play a coaching role, helping teams to identify opportunities and points of consideration and to navigate challenges. In this way, GBC-Education shares its expertise and supports partners' growth in thinking strategically about philanthropy. GBC-Education also has the potential to help companies develop capacity through its networking opportunities. Although not all partners found the networking aspect critical to helping their companies meet CSR or ESG goals, some representatives with whom we spoke found it beneficial to have a forum to exchange ideas and learn about other companies' approaches.

In terms of the BHP Foundation's interim outcomes of interest, the resources and services that GBC-Education offers have the potential to support companies in **engaging in networks of purposeful collaboration and making more informed decision-making**, with the ultimate goal of more-efficient and more-impactful education investments. The *ESG + Education Playbook*, for example, can help companies align their projects or initiatives with ESG goals. The playbook also pushes companies to deliberate on metrics for demonstrating impact early in the decisionmaking process to avoid making an investment decision with an effect that is challenging or impossible to track and quantify. Moreover, although these efforts are still underway, GBC-Education's strategy of convening members and brokering relationships may yield future fruitful collaborations among members.

Considerations for Organizations Supporting Strategic Investments in Education

This case offers the following two points of reflection for organizations working to support strategic investments in education:

- **Social impact teams may need to lobby from within to build support for education initiatives. Having easy-to-interpret data about how companies can reduce global inequity and tools to help quantify benefits of investing in education may make this task easier.**

As mentioned previously, a myriad of factors accounts for companies' decisions about philanthropic and strategic investments. Some authors suggest that transformation to more-sustainable, socially conscious business models starts at the top, with a shift in the types of questions that senior leaders ask themselves about the future of the world and their role in shaping that future (Bhattacharya and Polman, 2017). Compared with other priority areas—such as environmental issues—investments in education may not typically rise to the forefront. The company representatives with whom we spoke said that having easy-to-digest evidence that they could share about education's most pressing challenges with senior staff members helped or could help build a convincing case for investing in education—especially when that evidence is tied to a company's core values or philanthropic mission.

- **Education initiatives should create value for all stakeholders. Achieving meaningful goals in education entails balancing the business case for greater investment and ensuring that the interests of all local and regional communities are fully accounted for.** Little is known about how corporate philanthropy affects those it purports to help over the long term (Mei and Wang, 2021). Related questions—such as “What is the purpose of education?” and “What role should private companies play in shaping these purposes?”—are complex. Such questions cut across the needs and interests of innumerable stakeholders on multiple scales (e.g., regional governments, local parents and family members, global NGOs). To achieve real impact and to avoid unintended consequences, care must be taken to understand the priorities and values that companies promote through their investments in education and to measure these against the needs and priorities of all stakeholders, especially those of end recipients and the future society as a whole. According to our interviewees, one way in which GBC-Education navigates this balance is by

maintaining relationships with local governments, NGOs, and UN agencies. For example, to help HP distribute laptops, GBC-Education consulted and coordinated its efforts through these key actors, which allowed it to define the scope of the problem. Representatives from GBC-Education explained how this opportunity cemented key relationships in the region on which they intend to build. At the same time, it is possible that state-level actors and international nonprofits may be too

far removed from localized challenges. Thus, meaningful efforts at assessment are needed, as well, to ensure that large-scale global efforts are meeting the needs of intended end recipients, as defined by local stakeholders.

Summary of Methods

This report is based on information we collected during semistructured interviews with representatives from the Global Business Coalition for Education (GBC-Education) and representatives from GBC-Education's coalition of member partners. The company representatives whom we interviewed for this case study were selected and recruited by GBC-Education for the purpose of helping us understand the scope of GBC-Education's activities. We conducted six total interviews between fall 2022 and fall 2023. These six interviews consisted of one interview with two representatives from GBC-Education in September 2023, interviews with one representative from HP in November 2022 and May 2023, and interviews with one representative each from Schneider Electric in October 2023, from SAP in February 2023, and from Ancestry in October 2023.

All interviews were recorded and transcribed. To characterize the types of strategies that GBC-Education used with its GBC-Education coalition members and the challenges they reported in doing so, we created a table with simple headers (e.g., strategies or activities, challenges); these headers were informed by the coding schemes that we applied in our previous case studies (see Wolfe, Wang, and Master, 2023a; 2023b; 2023c; 2023d) and periodic conversations with GBC-Education. One team member extracted the relevant interview data on these topics into this table for further analysis. Working iteratively, we consolidated the activities, projects, and products that company representatives said they engaged in or used as a result of their partnership with GBC-Education into the three main strategies we discussed in this report. We triangulated and supplemented these findings with additional information from GBC-Education's annual and biannual reports to the BHP Foundation and with information that is publicly available on GBC-Education's website, which we reviewed in preparation for this report. Additionally, we consulted biannual interviews conducted with representatives from GBC-Education from 2020 to 2023 as part of our team's larger evaluation of the BHP Foundation's EE program; however, these interviews were not part of our formal analysis for this case study. Prior to publication, we provided a draft of our findings for fact-checking to representatives from GBC-Education and the four featured partners.

We note several limitations. First, this case study is intended as a descriptive deep dive into selected efforts by one partner (GBC-Education); it is part of a much broader evaluation effort. In this respect, the report is limited in scope. Second, given the timing of our data collection, which took place early in the work of GBC-Education and its partners, we do not yet know how the efforts we have described will affect strategic corporate giving or the global education landscape over time. A third limitation of this report is that we conducted a relatively limited number of interviews. Finally, the experiences of the representatives we interviewed may not be representative of the experiences of other GBC-Education coalition partners or of the coalition as a whole, particularly because the organizations we interviewed were selected by GBC-Education.

APPENDIX

The BHP Foundation Education Equity Program Theory of Change (2018–2023)

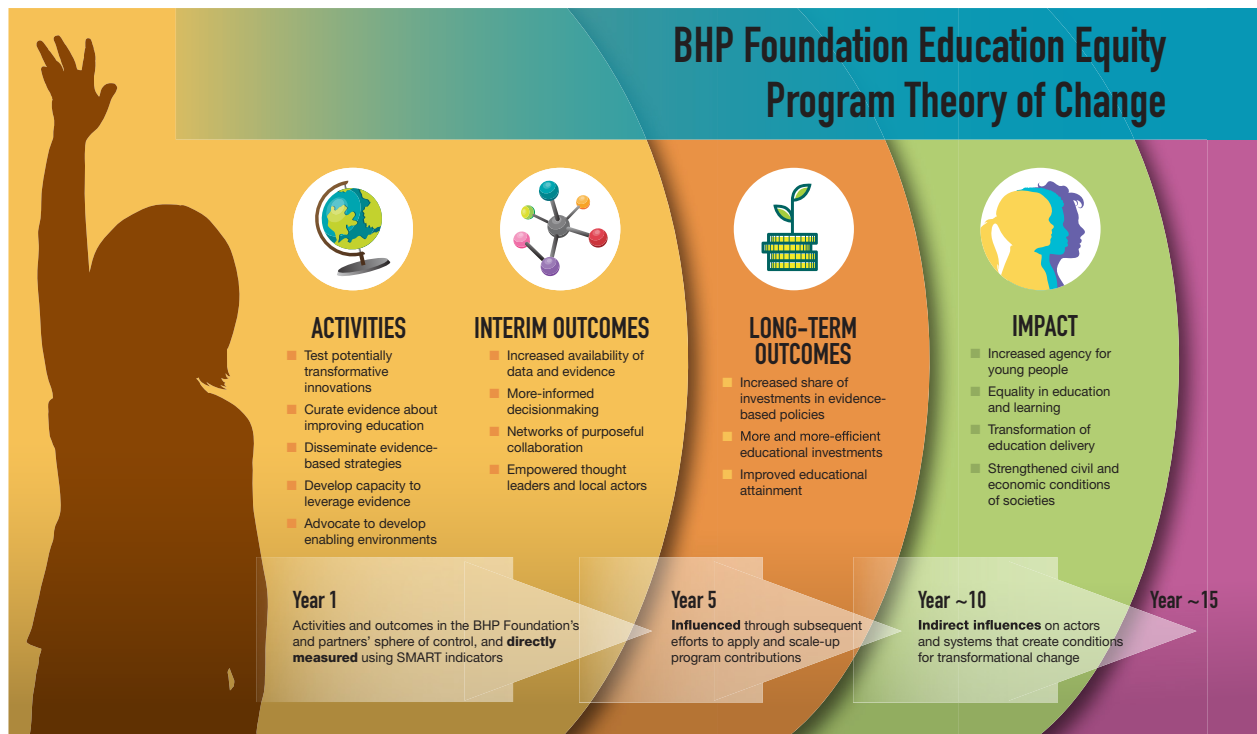
The BHP Foundation, through its Education Equity Program (hereafter referred to as *the program*), is investing in a variety of global initiatives focused on leveraging evidence and testing transformative innovations to improve access and equity in systems of education globally. The program has prioritized initiatives “with the potential to spur transformative ‘step changes’ in educational practices at-scale, and to achieve these goals primarily by using evidence to enhance the quality of decisionmaking, investments, and educational practice” (Master, Wang, et al., 2023).

The program’s initial theory of change, developed in 2018, is shown in Figure 1. As described in published reports of the RAND team’s independent evaluation of the program (Master, Wang, et al., 2023), the figure “summarizes the core investments made in the first phase of the Program, as well as the anticipated time frame for impacts. It describes

how the funded partners are collectively engaged in varied activities to enhance educational equity through the use of evidence.” Such activities include generating evidence about new innovations, curating and disseminating effective strategies, building capacity to leverage evidence in decisionmaking, and advocating to ensure that societies and systems provide an enabling environment for more-informed investments in education and learning. Within the first five years of the funded activities, the program expects to see outcomes that are interim in nature. These include greater availability of evidence and data, empowered thought leaders engaged in more-informed decisionmaking, and the establishment of networks of purposeful collaboration. Long-term impacts will take more time.

Figure 1 and our case studies to date reflect the initial program theory of change. As of the time of this publication, the program has refined its theory of change and pathways toward intended impacts in anticipation of future investment in support of educational initiatives globally.

FIGURE 1
Education Equity Program Theory of Change (2018–2023)



About the BHP Foundation Education Equity Program Evaluation Case Study Series

This case study is based on research funded by the BHP Foundation as part of an overall study of its Education Equity (EE) program investment. The findings and conclusions presented are those of the authors and do not necessarily reflect positions or policies of the BHP Foundation. Launched in 2017, the program has invested in a wide variety of activities aimed at addressing the need to better leverage evidence and data to inform educational practice and to help facilitate transformative improvements in the quality of educational delivery. In its first funding window, the program has supported five partner organizations (partners) whose efforts span diverse country contexts and target learners both within and outside formal educational systems:

1. Center for Universal Education at The Brookings Institution
2. Education Endowment Foundation
3. Global Business Coalition for Education
4. Teach For All
5. UN Women.

The RAND team is evaluating the BHP Foundation EE program investment during a five-year period, from 2019 to 2024. The purpose of the evaluation is to assess program impacts, share formative insights to inform the program's continuous improvement, and provide recommendations related to program strategy and the BHP Foundation's theory of change (see the appendix for details). Our first evaluation report was published in 2021 (Master et al., 2021). An interim findings report was published in spring 2023 (Master et al., 2023), and a final report is scheduled to be published in spring 2025.

The case studies are one component of our evaluation. Each case study describes the arc and implementation of single partner initiatives that are illustrative of the BHP Foundation's theory of change (2018–February 2023). We believe that this series will be of interest not only to the BHP Foundation and its program partners but also to policymakers engaged in global education, organizations interested in implementing educational change efforts, and other foundations interested in investing in global educational change.

Through our cases, we seek to demonstrate the BHP Foundation's theorized pathway between one or more categories of program activities (e.g., curating evidence, disseminating evidence-based strategies, developing capacity) and one or more interim outcomes (e.g., increased availability of evidence, more-informed decisionmaking, networks, and empowered local actors) as articulated in the program theory of change to date.

To select the focus for each case study, we considered the activity or activities and pathway(s) that each BHP Foundation-funded partner could best or uniquely illustrate. We approached the partner with the case study idea(s) to elicit input. Studying implementation involves collecting data at the level at which activities are implemented; consequently, we asked the funded partner to identify and connect us with a local in-country partner performing the on-the-ground work that we would highlight. This process likely yields case narratives that are positive or successful examples of partners' work.

Additional details on our methods are included in the body of each of our case studies.

Notes

¹ In this report, the term *investment in education* refers to private contributions of resources, goods, or capital to increase access to educational opportunities for the purpose of generating positive social impact alongside benefits for investing companies. Such benefits could include the ability to secure future talent, reduced costs spent on training underprepared employees, increased financial returns, and broadened appeal to consumers (Winthrop et al., 2013).

² This report is structured similarly to the other case studies in this series, including our description of the EE program and the EE program's theory of change, which draws on recycled text. The appendix and the "About the BHP Foundation Education Equity Program Evaluation Case Study Series" section are nearly identical to the versions that appear in our other case studies.

³ The perspectives of the company representatives presented in this report are those of our interviewees and do not necessarily reflect the views or positions of the companies that they represent.

References

- Ancestry, homepage, undated. As of May 20, 2024: <https://www.ancestry.com>
- Ancestry, *2022 Impact Report: For Generations to Come*, 2022.
- Argandoña, Antonio, and Heidi von Weltzien Hoivik, "Corporate Social Responsibility: One Size Does Not Fit All. Collecting Evidence from Europe," *Journal of Business Ethics*, Vol. 89, 2009.
- Bhattacharya, C. B., *Small Actions, Big Difference: Leveraging Corporate Sustainability to Drive Business and Societal Value*, Routledge, 2019.
- Bhattacharya, C. B., and Paul Polman, "Sustainability Lessons from the Front Lines," *MIT Sloan Management Review*, Winter 2017.
- Cha, Wonsuk, and Ujvala Rajadhyaksha, "What Do We Know About Corporate Philanthropy? A Review and Research Directions," *Business Ethics, the Environment and Responsibility*, Vol. 30, No. 3, July 2021.
- Dattani, Pratik, Adam Still, and Vikas Pota, *Business Backs Education*, January 2015.
- Gautier, Arthur, and Anne-Claire Pache, "Research on Corporate Philanthropy: A Review and Assessment," *Journal of Business Ethics*, Vol. 126, 2015.
- GBC-Education—See Global Business Coalition for Education.
- Global Business Coalition for Education, "Join the Coalition," webpage, undated-a. As of May 14, 2023: <https://gbc-education.org/join-the-coalition/>
- Global Business Coalition for Education, *Your Journey to Impact*, undated-b.
- Global Business Coalition for Education, "Proposal to the BHP Foundation," internal document provided to the authors, 2019.
- Global Business Coalition for Education, "Laptops Give Ukrainian Children a Lifeline to Education," November 28, 2022.
- Global Business Coalition for Education, *2023 Annual Report: Phase 3*, internal report provided to the authors, 2023a.
- Global Business Coalition for Education, *Midyear Report*, internal report provided to the authors, 2023b.
- Global Business Coalition for Education, *ESG + Education Playbook*, Fall 2023c.
- Greenhalgh, Caroline, and Paul Montgomery, "A Systematic Review of the Barriers to and Facilitators of the Use of Evidence by Philanthropists When Determining Which Charities (Including Health Charities or Programmes) to Fund," *Systematic Reviews*, Vol. 9, 2020.
- HP Inc., *Go Beyond: Sustainable Impact Report*, 2022.
- HP—See HP Inc.
- International Commission on Financing Global Education Opportunities, *The Learning Generation: Investing in Education for a Changing World*, 2016.
- Levy, David, and Rami Kaplan, "Corporate Social Responsibility and Theories of Global Governance: Strategic Contestation in Global Issue Arenas," in Andrew Crane, Dirk Matten, Abigail McWilliams, Jeremy Moon, and Donald S. Siegel, eds., *The Oxford Handbook of Corporate Social Responsibility*, Oxford University Press, 2007.
- Master, Benjamin K., Shelly Culbertson, Brian Phillips, Elaine Lin Wang, Harold D. Green, Joe Francombe, Hamish Evans, and Susan Guthrie, *Transforming Global Education Through Evidence: An Evaluation System for the BHP Foundation's Education Equity Global Signature Program*, RAND Corporation, RR-A239-1, 2021. As of May 22, 2024: https://www.rand.org/pubs/research_reports/RRA239-1.html
- Master, Benjamin K., Elaine Lin Wang, Brian Phillips, Rebecca L. Wolfe, and Harold D. Green, *The BHP Foundation's Education Equity Program: Midterm Evaluation Findings (2018–2022)*, RAND Corporation, RR-A 239-6, 2023. As of May 14, 2024: https://www.rand.org/pubs/research_reports/RRA239-6.html
- Mei, Maggie Qiuzhu, and Tao Wang, "Place and Corporate Philanthropy: A Systematic Review," *International Journal of Management Reviews*, Vol. 23, No. 3, 2021.
- Moran, Michael, and Elizabeth Branigan, "The Contested Terrain of Corporate Philanthropy and Social Responsibility: Theories, Approaches and Challenges," in Tobias Jung, Susan D. Phillips, and Jenny Harrow, eds., *The Routledge Companion to Philanthropy*, 2016.
- SAP, *Integrated Report*, 2022.
- Schneider Electric, *2022 Social Impact Report—Digital and Electric: For a Sustainable and Resilient Future*, 2022.
- SE—See Schneider Electric.
- Smith, N. Craig, "Corporate Social Responsibility: Whether or How?" *California Management Review*, Vol. 45, No. 4, 2003.
- UNESCO—See United Nations Educational, Scientific and Cultural Organization.
- United Nations Educational, Scientific and Cultural Organization, *SDG 4 Mid-Term Progress Review: Progress Since 2015 Has Been Far Too Slow*, 2023a.
- United Nations Educational, Scientific and Cultural Organization, *Can Countries Afford Their National SDG 4 Benchmarks?* April 2023b.
- van Fleet, Justin, *A Global Education Challenge: Harnessing Corporate Philanthropy to Educate the World's Poor*, Brookings Institution, April 2011.

Williams Group, *Marketing Your Knowledge: A Report to Philanthropy's R&D Organizations*, 2004.

Winthrop, Rebecca, Gib Bulloch, Pooja Bhatt, and Arthur Wood, *Investment in Global Education: A Strategic Imperative for Business*, Brookings Institution, September 2013.

Wolfe, Rebecca L., Elaine Lin Wang, and Benjamin K. Master, *Developing Enabling Environments for Women's Access to Education and Vocational Opportunities: A Case Study of Policy Change Efforts Led by UN Women's Second Chance Education Programme in India*, RAND Corporation, RR-A239-5, 2023a. As of May 15, 2024:
https://www.rand.org/pubs/research_reports/RRA239-5.html

Wolfe, Rebecca L., Elaine Lin Wang, and Benjamin K. Master, *Engaging a Global Network to Curate and Disseminate Evidence About What Works to Improve Family-School Engagement: A Case Study of the Center for Universal Education's Family-School Engagement Playbook Effort*, RAND Corporation, RR-A239-3, 2023b. As of May 15, 2024:
https://www.rand.org/pubs/research_reports/RRA239-3.html

Wolfe, Rebecca L., Elaine Lin Wang, and Benjamin K. Master, *Taking a Contextualized Approach to Synthesizing and Mobilizing Evidence About What Works to Improve Education: A Case Study of Queen Rania Foundation's Contextualized Teaching and Learning Toolkit Effort, in Partnership with the Education Endowment Foundation*, RAND Corporation, RR-A239-4, 2023c. As of May 15, 2024:
https://www.rand.org/pubs/research_reports/RRA239-4.html

Wolfe, Rebecca L., Elaine Lin Wang, and Benjamin K. Master, *Synthesizing and Sharing Insights to Accelerate Innovation Across a Global Education Network: A Case Study of Enseña Ecuador's and Enseña por Paraguay's Engagement with Teach For All's Teaching as Collective Leadership Framework*, RAND Corporation, RR-A239-8, 2023d. As of May 15, 2024:
https://www.rand.org/pubs/research_reports/RRA239-8.html

Acknowledgments

We thank Global Business Coalition for Education leadership and representatives from Schneider Electric, HP Inc., SAP, and Ancestry for sharing their time and insights with us over one or more interviews. We are grateful to the BHP Foundation for supporting the evaluation and this report. We especially thank Faith Rose, the Program Director for Education Equity at the BHP Foundation and Muza Gondwe, Program Officer at the BHP Foundation for their guidance. We benefited greatly from the review and feedback of C. B. Bhattacharya and of our RAND colleague Jenna Kramer. Thanks to Jill Cannon and Lea Ann Gerkin from RAND for managing the quality assurance process, as well as Melissa Parmelee and Monette Velasco, who provided expert editing and publication management assistance, respectively. We take full responsibility for any errors in the report.



RAND is a research organization that develops solutions to public policy challenges to help make communities throughout the world safer and more secure, healthier and more prosperous. RAND is nonprofit, nonpartisan, and committed to the public interest.

Research Integrity

Our mission to help improve policy and decisionmaking through research and analysis is enabled through our core values of quality and objectivity and our unwavering commitment to the highest level of integrity and ethical behavior. To help ensure our research and analysis are rigorous, objective, and nonpartisan, we subject our research publications to a robust and exacting quality-assurance process; avoid both the appearance and reality of financial and other conflicts of interest through staff training, project screening, and a policy of mandatory disclosure; and pursue transparency in our research engagements through our commitment to the open publication of our research findings and recommendations, disclosure of the source of funding of published research, and policies to ensure intellectual independence. For more information, visit www.rand.org/about/research-integrity.

RAND's publications do not necessarily reflect the opinions of its research clients and sponsors. **RAND**® is a registered trademark.

For more information on this publication, visit www.rand.org/t/RR-A239-9.

© 2024 BHP Foundation

Cover photo: Ridofranz/Getty Images

www.rand.org

About This Report

The Global Business Coalition for Education (GBC-Education) was founded to bring the business community together to end the global education crisis. GBC-Education seeks to increase investments in education from the private sector. In 2019, GBC-Education began developing a suite of resources and services to support partners in its network in making more-strategic investments in education that are aligned with their goals for corporate social responsibility and their environmental, social, and governance strategies. This report describes part of GBC-Education's work with four member companies: Schneider Electric, HP Inc., SAP, and Ancestry.

RAND Education and Labor

This study was undertaken by RAND Education and Labor, a division of RAND that conducts research on early childhood through postsecondary education programs, workforce development, and programs and policies affecting workers, entrepreneurship, and financial literacy and decisionmaking. This case study was sponsored by the BHP Foundation as part of an overall evaluation of its Education Equity program investment. The findings and conclusions presented are those of the authors and do not necessarily reflect positions or policies of the BHP Foundation.

More information about RAND can be found at www.rand.org. Questions about this report should be directed to Elaine Wang (ewang@rand.org), and questions about RAND Education and Labor should be directed to educationandlabor@rand.org.