Survey of the cumulative impact of water, sanitation, and hygiene:
Implementers’ efforts to address global water and sanitation crises

World Vision Water
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Unless otherwise stated, the proposed recommendations made throughout this paper are World Vision’s and do not necessarily represent the views of the individuals or organizations interviewed. Furthermore, World Vision would like to thank those 37 organizations who have contributed their support through an online survey.

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World Vision (WV) believes that every child deserves clean water. That is why in 2010 we made a strategic effort to scale up our efforts to help address the global water crisis and help provide water, sanitation, and hygiene (WASH) to millions of people in the hardest to reach places in the developing world.

The challenge of providing these services is complex and we are committed to bringing positive and lasting change to even the remotest communities currently lacking access to WASH services. World Vision is now the largest nongovernmental organization (NGO) provider of clean water in the developing world—reaching more than 2 million people per year with clean drinking water.

In reaching this scale, we began to wonder what the cumulative impact of our fellow WASH implementers is and whether this cumulative scale will provide a significant impact in addressing the need for clean water, improved sanitation, and hygiene post-2015. As the Sustainable Development Goals (SDGs) consider universal coverage targets by 2030, we wondered: What is the potential contribution from the philanthropic efforts of WASH implementers and how can this potential be improved leading up to 2030?

To take a closer look at this question, World Vision engaged KPMG LLP (KPMG) to implement a survey among NGOs involved with WASH activity and interview key practitioners in the sector. This report is a result of that work and provides a snapshot of current activity in the sector. It is intended to serve the WASH community as they consider sustainable goals post-2015.

As described below, the results of this study showed the organizations that responded to our survey reached nearly 7 million people with clean water in 2014. Assuming that the number of people reached by these WASH implementers remains the same each year, then a cumulative 110 million people will be reached with clean water between 2015 and 2030, representing a significant portion of those still lacking clean water. The survey also showed a 30 percent growth in people reached between 2013 and 2014. Assuming a compound growth rate of 30 percent then these WASH implementers would reach everyone remaining to be reached with water access by 2027, three years ahead of the proposed SDGs.

We frequently hear that charity isn’t going to solve the problem of the global water crisis. This is a misleading statement. As shown by these survey results, philanthropy or charity is playing a critical role in solving the global water crisis. But, these results confirm that philanthropy alone will not solve the crisis. This is even more apparent in the gap of those needed to be reached with sanitation. It is clear from these results that we need philanthropic and private sector investment as well as governments all playing their role.
As someone who spent 27 years in the private sector, I am familiar with the power of brands and the resources that can be mobilized in the private sector. Now, with World Vision, I am experiencing more closely through my visits to villages worldwide, the need for WASH services and the desire among resource-limited communities to see investment in these areas. I recognize the critical role that philanthropic dollars play in reaching the hardest to reach locations and enabling government to begin to provide these fundamental services and build community capacity. This exercise has underscored for me the importance of a collaborative effort between the not-for-profit, the private, and the government sectors to ensure that everyone has access to clean water, hygiene and sanitation facilities by 2030.

Thank you to the organizations that helped ensure that the survey was shared with all WASH implementers globally. This includes the newsletter of the Water Institute at the University of North Carolina – Chapel Hill, the newsletter of WASH Advocates, the newsletter of the UNICEF/WHO International Network to Promote Household Water Treatment and Safe Storage, the newsletter of WCP online, and the e-mail list of the University of Oklahoma WaTER Center. Special thanks to WASH Funders for sharing the survey and its intent with the WASH community via a blog on WASHfunders.org.

Sincerely,

Dr. Greg Allgood, MSPH, PhD
Vice President, World Vision U.S.
Acknowledgements

Thank you to all WASH practitioners and implementers who agreed to be interviewed for this research, and for sharing your sector insights and experiences with us. Thank you also to the organizations that helped ensure that our online survey was shared with all WASH implementers globally. Finally, thank you to the 37 WASH implementers who completed the survey and your efforts to help solve the global water crisis.
In 2010, with a commitment to bringing clean water to every child, World Vision (WV) began to scale its efforts to address the global water crisis. As WV expanded services to reach more than 2 million people in 2014, the question of impact and cumulative sector impact arose. As the development sector considers a new set of goals, how will the water, sanitation, and hygiene (WASH) sector best maintain its gains and prepare for the challenges ahead?

To address these questions, WV engaged KPMG LLP (KPMG) to conduct a sector survey and interview key practitioners in an effort to provide information around the collective impact of implementing organizations, the investments made towards their efforts, and perspectives on the key challenges ahead.

Data from a total of 37 survey respondents and 10 interviews provided the basis for observations shared in this report. The results demonstrated that the organizations that responded to the survey reached nearly 7 million new people with clean water in 2014, a 30 percent growth in new recipients between 2013 and 2014 through their combined efforts.

Respondents reported to have reached over 4.5 million new people with sanitation services, a growth rate of 15 percent between 2013 and 2014 through the combined efforts of organizations working on this issue.

Community-based handwashing education is seen by survey respondents as an integral part of implementing water and sanitation solutions, and over 13 million people were reached with various forms of hygiene awareness training and materials in 2014, an increase of 48 percent from 2013.

A total of $187 million was reported as the investment by survey respondents across WASH activities in 2014, a 60 percent increase in spending over 2013.

Insights from leading sector practitioners point to several opportunities and challenges that, when addressed, could play a positive role towards accelerating universal coverage of WASH.

These include:
- Connecting WASH to integrated water resources management
- Securing continued investment in WASH solutions
- Stimulating local ownership of infrastructure and attracting required human resources
- Building resilience during physical water scarcity and increased urbanization
- Standardizing meaningful indicators of progress and data collection methods

With WASH firmly established within the Sustainable Development Goals (SDGs), the potential contribution of the philanthropic sector and its partner implementing organizations cannot be understated. As WASH implementers increase operational excellence and improve the collection of quantitative data, the sector will benefit from learning more about the resources required to meet the post-2015 vision. Through an integrated approach with the private sector and governments, and securing appropriate levels of investment for continued WASH progress, it may be possible to achieve universal coverage.
World Vision engaged the support of KPMG, a global network of professional services firms, to collaborate on an effort to assess the current cumulative impact of the philanthropic WASH sector, and identify opportunities for improvement and collaboration. KPMG based the contents of this report on desk research of the available literature and thought leadership, as well as a survey and interviews conducted with representatives from key implementing organizations.

The electronic survey aimed at collecting more granular and quantitative data was conducted amongst practitioners. Interviews to gain closer and more in-depth insights were conducted with leading organizations and implementers. Interview questions were formulated to include geographic focus, implementation approach, investment size, ongoing monitoring efforts, reported metrics, collection methodology, and key definitions used.

Extensive efforts were made to ensure that the survey reached all key WASH implementers including approaching those organizations known to be leaders in WASH implementation. The survey was disseminated through the newsletters of key WASH organizations.

This work did not constitute an audit and KPMG does not provide an assurance opinion on any data detailed in this report.
The eight Millennium Development Goals (MDGs) and their respective targets were launched following the United Nations Millennium Summit in 2000 and its Millennium Declaration—which was adopted by the UN General Assembly of 189 Member States on September 8, 2000. These eight concrete goals have helped shape and guide the field of international development during the first part of the new millennium and have improved the lives of many of the world’s least advantaged citizens.

After 15 years, the outcomes of the MDGs have been very positive in some countries and regions, and for some of the goals, a significant number of the original targets have been met at an aggregated level:

- Extreme poverty has been cut in half.
- An estimated 3.3 million deaths from malaria were avoided between 2000 and 2012.
- Access to an improved source of clean drinking water was provided for 2.3 billion people between 1990 and 2012.
- More children are attending primary school, and gender parity in primary education has improved.
- Political participation for women has increased.


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Within MDG Goal 7 ("Ensure environmental sustainability"), target 7C has the stated ambition to "Halve, by 2015, the proportion of the population without sustainable access to safe drinking water and basic sanitation"—to be measured through two main (proxy) performance indicators:

- Proportion of population with sustainable access to an improved water source, urban and rural.
- Proportion of urban population with access to improved sanitation.

Official United Nations and World Health Organization tallies indicate that the world met the target of halving the proportion of people without access to improved sources of water in 2010, five years ahead of schedule. But, despite progress on this goal, 2.5 billion people in developing countries still lack access to improved sanitation facilities, with 1 billion still practicing open defecation—causing this to be the most underachieved of all MDG targets and arguably the most serious challenge to public health and sustainable development, especially in rapidly growing urban areas and those regions with the poorest and most vulnerable people.

With the MDGs running their course by the end of 2015, it was decided at the 2012 Rio+20 conference that a process would be launched to develop a set of SDGs, which would build upon the MDGs and converge with the post-2015 UN development agenda spearheaded by its Secretary-General (SG) and its President of the General Assembly (PGA).

These SDGs will not be finalized until the fall of 2015. An Open Working Group of 70 Member States has now proposed, based on an almost two-year inclusive process involving numerous stakeholders, a set of 17 SDGs, whose targets and indicators will be announced at the UN General Assembly during its 70th session to be held in September 2015.

As a sign of its importance, and reflective of the work still ahead, the availability and sustainable management of water and sanitation for all was proposed as a stand-alone goal 6 in the SDGs. This now places the issue of WASH firmly within an integrated post-2015 framework of international development.

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2. Between 1990 and 2012, 2.3 billion people gained access to improved drinking water sources, while still leaving 748 million people without access in 2012. Progress has been uneven however, with considerable differences existing across regions, between urban and rural areas, and between rich and poor. At the start of 2014, there were still 45 countries off track in terms of reaching the MDG on access to an improved water source – [http://www.who.int/mediacentre/factsheets/fs290/en/](http://www.who.int/mediacentre/factsheets/fs290/en/) (updated May 2014). Note here also the distinction between an “improved” source and a “safe” source, which arguably could mean that close to 2 billion people use water that is unsafe and dangerous for their health, while 3.4 billion people use water of doubtful quality, at least from time to time – [http://www.circleofblue.org/waternews/wp-content/uploads/2013/02/Payen_DrinkingWaterNeedsUnderEstimate_EN_2011-11-09.pdf](http://www.circleofblue.org/waternews/wp-content/uploads/2013/02/Payen_DrinkingWaterNeedsUnderEstimate_EN_2011-11-09.pdf) (published November 9, 2011)


Reactions from within the field of practitioners on the proposed post-2015 WASH goals are generally positive, although there remain concerns about the omission of certain targets pertaining to facilities separate from household access, water quality, and the human right to water and sanitation. Nevertheless, contributions on how to operationalize the proposed goals into clear and unambiguous targets and indicators (e.g., on equity and nondiscrimination, handwashing, menstrual hygiene, maternal and child health) are numerous. Various collaborations between nongovernmental groups, business practitioners, technical committees, and driven individuals have been working on including access to WASH as a separate goal ever since the initial 2000 MDGs were first formulated—citing WASH’s impact on other social, economic, and sustainable development topics such as nutrition, health, gender equality, HIV, maternal healthcare, and child survival.

Given the power of global goals to help shape and align national priority-setting processes (e.g., through policy reforms, institutional change, and resource allocation)—and linking these to existing supportive regional frameworks—and ensuring coordination and alignment between goals (e.g., within the water-food-energy nexus), it is considered a positive development that there is now a space to articulate clear and ambitious new targets on WASH for the period 2015 to 2030.

However, the challenge is daunting and a number of questions remain. With predictions of demand for water resources outstripping supply by 40 percent in 2030, the evolving dialogue between solely measuring outputs of WASH intervention programs (i.e., number of beneficiaries reached) and measuring (long-term) impact of the intervention through more detailed metrics, the lack of established data on WASH interventions beyond the household (e.g., schools, healthcare facilities, workplaces) and the continued discrepancy between funding leveraged for drinking water projects and funding for sanitation, it is clear that work in WASH will carry forth long after 2015.

World Vision will continue to be an active participant in this work, building on our legacy of providing lasting solutions through total transparency.

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6. Please refer to the work done by the African Ministers’ Council on Water (AMCOW), the African Development Bank, the European Union Water Initiative, the United Nations Development Programme (UNDP), the World Bank’s Water and Sanitation Program (WSP), the Water Supply and Sanitation Collaborative Council (IWSSC), the World Business Council for Sustainable Development (WBCSD), the 2030 Water Resources Group, the Millennium Water Alliance, WASH Advocates, the End Water Poverty campaign, and the Global Water Partnership (GWP)


8. On average, drinking water projects continue to absorb the majority of WASH funding, even in countries with a relatively high drinking water coverage and a relatively low sanitation coverage
3. Setting the standards: impact measurement

With the global WASH agenda shifting focus from access to impact indicators in a post-2015 world, it is important to learn from the past, mobilize resources for continued investment, manage performance, increase transparency and accountability, and create sustainable change.

These challenges are currently under discussion throughout different sectors including private sector stakeholders seeking to demonstrate their social commitment, impact investors measuring results through methodologies such as the Impact Reporting and Investment Standards (IRIS), and government donors requesting proof of impact data from funded projects. Philanthropic donors have been key leaders in this discussion working with third-party evaluators to develop baseline performance standards.

In a recent survey among 1,000 philanthropic charities with incomes over USD 15,000, New Philanthropic Capital (NPC) found that 75 percent of charities in the United Kingdom say they measure some or all of their work, and 52 percent of these say they did so to meet funders’ requirements. This is a significant change from even ten years ago when the concept of tracking and demonstrating impact was not on the agendas of many donors.\(^9\)

With limited principles or standards in use to date, measuring the result of an intervention is often costly and time-consuming, as well as subject to different definitions and reporting requirements.

The development community is taking up the challenge, and working collaboratively with peers, donors, private sector stakeholders, academic institutions, and governments to establish common performance indicators on WASH. Initiatives such as the WASH Performance Index, being developed by the UNC Water Institute and the Conrad N. Hilton Foundation, as well as the WASH DataPoint project being developed by the Global Water Challenge, are examples of efforts to synthesize the different dimensions of WASH (e.g., service type, safety, quality, quantity, accessibility, continuity, and equity) into a standardized results measurement framework with common input, output, outcome, and impact indicators for use at household and nonhousehold settings. Built on top of these efforts for standardization we see innovative funding mechanisms being developed that provide financing for outcomes rather than inputs. First Climate AG and The Gold Standard are developing a results-based finance approach in The Water Benefit Standard—seeking to reduce risk in development work and secure verifiable impact.

WV is fully committed to supporting such progressive sector initiatives, and working with all sector stakeholders to reach the most underresourced communities in the hardest to reach places.

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“There is a huge opportunity in the next five years for the WASH sector to embrace real-time data to measure collective impact, at least at the outcome level, across organizations.”

*Vice President for Program Excellence of a large WASH implementer*
10. WASHfunders.org reports the contribution of the philanthropic sector toward the growth of activity in the WASH sector cannot be understated. According to WASHfunders.org, the number of U.S. foundations giving to WASH increased from 24 to 78 foundations between 2003 and 2010. A focus on basic drinking water supplies and basic sanitation services received 31 percent of the grant dollars in this time. Since that time, new philanthropic wealth has been brought to the issue.

Our own survey supports that the continued contribution by the philanthropic sector along with operational efficiencies and measurement methodologies has allowed implementing organizations to more accurately quantify the growth in recipients reached between 2013 and 2014 against investments in respective years. The UN report GLAAS 2014 concluded that while governments confirm strong support for universal access

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Growth scenarios for numbers of people reached with water and sanitation solutions through collective NGO action

On the current trajectory, 100% of water needs could be met by 2027 and 10% of sanitation needs by 2030.

For water access, the target is 768 million currently not served—under a CAGR 30% scenario, this target will be reached by 2027.

For sanitation access, the target is 2.5 billion currently not served—under a CAGR 15% scenario, only 10% of this group will be reached through collective NGO action by 2030.

10. WASHfunders.org reports
11. The UN Water Global Analysis and Assessment of Sanitation and Drinking Water GLAAS 2014
Nearly 7 million people (6.8 million) reached with clean water in 2014. Most of the people reached with hygiene were those who attended training, and 13 million people were reached in 2014.

Just 2 of the NGOs reached about 80% of the people with improved sanitation.

The World Economic Forum has named water as one of the top three global risks for two years running.

In 2012, 89% of the world’s population had access to an improved drinking water source, compared with 76% in 1990.* 780 million people rely on unimproved sources for water including 173 million who depend on surface water.*

A total of $187 million was spent by these NGOs to provide water, sanitation, and hygiene. Two organizations reported spending 60% of these funds.

Indicating a ramp-up in efforts to solve the global water crisis, there were significant increases in people reached with water, sanitation, and hygiene as well as funds spent from 2013 to 2014 (30 to 60% increase).

Even though the need for access to improved sanitation is greater than that of water, the number of beneficiaries reached with sanitation solutions by this group of NGOs is considerably lower (4.5 million). 2.5 billion people still do not have basic sanitation facilities such as toilets or latrines.*

Survey of the cumulative impact of water, sanitation, and hygiene: Implementers’ efforts to address global water and sanitation crises to drinking water and sanitation, national financing for WASH is insufficient. Reported government expenditures from tax and transfers on sanitation and drinking water ranged from less than 0.01 percent to 1.78 percent of GDP—significantly less than other social sectors. The same report continues to acknowledge that increased international aid has had a positive impact, yet efforts are constrained by the lack of human resources, and there is still a great need in rural areas where expenditures are low. Clearly the need among communities for basic services continues. A continued collaboration and integration among all stakeholders is required to reach those still underserved.

*GLAAS 2014
5. The Work ahead of us

With a vision of universal coverage in WASH, stakeholders are now considering their contribution towards the integrated post-2015 sustainable development agenda. Outreach was completed during this exercise with leading practitioners in the field, and their insights have identified priority issues facing the WASH sector. These include:

1. Connecting WASH to integrated water resources management

With the population expected to reach 9 billion inhabitants by 2050, it is paramount to continue to ensure an equitable distribution of fresh water resources to sustain basic human well-being—while keeping in mind economic uses of water and sustaining the underlying ecosystem for future generations and other users. Just building infrastructure will not be enough. We need to offer integrated water, sanitation, and hygiene services to the end user, in a sustainable, transparent, and reliable way—that ensures the continued functioning of the natural system on which all economic and social activity is built.

To do this in practice, at scale, in a rapidly changing natural environment, will be the defining challenge for the WASH sector going forward towards 2030.

2. Securing continued investment

Declining investments available for the nonprofit WASH sector—relative to some other development sectors—will have a negative impact on gains achieved to date. If universal and sustainable access to WASH is to be reached before 2030, then compounded growth is required from donors, bilateral funders, the private sector, and the global community.

The WASH sector needs to tell a better story to its funders and other (local) stakeholders, in order to help them understand that funding of WASH interventions does not end when having dug a well, built a water point, or constructed a toilet. Ensuring reliability and functionality in the long run requires continued investment (funding for replacement and repair of infrastructure), local presence, and social education to push behavioral change and adoption of services. Explaining to donors why funding of overhead cost is important, and giving insights into detailed allocations, is something the community of WASH implementers can do better.

“It is misleading to say that charity will not solve the global water crisis. Charity is clearly playing a critical role in reaching the most vulnerable and the current scale is a significant effort towards solving the global water crisis. But, it’s true that charity cannot do it alone.”

Vice President of Water of a large WASH NGO implementer
We need to develop a common set of definitions of what it is that we are driving for as a sector, and it needs to go beyond solely improved access in order to incorporate sustainability and safety.

Vice President for Program Excellence of a large WASH implementer

“We see water resources management becoming more and more of an issue for the sector going forward, and it can’t be solved simply with infrastructure.”

Senior Manager, Programming, of a large WASH implementer

Involving local stakeholders is critical to the success of sustainable WASH interventions. International organizations play an important role in building up capacity on the ground for communities to sustain their WASH infrastructure. This long-term scope and commitment needs to be built upon local ownership structures and capacity, such as Community-Led Total Sanitation (CLTS) committees, water user committees, local pump mechanics, and tariff collectors to ensure optimal service delivery. Finding appropriate local governance structures and involving talented and driven individuals to take ownership for communal WASH services is a necessary condition going forward.

Current WASH progress reports are a combination of national census data, demographic and health surveys, and the multi-indicator trusted household surveys developed and implemented by UNICEF. The result is a fairly standardized approach to track global progress on the adoption of improved WASH facilities within the household. However, if a more sophisticated story is to be told that includes additional indicators such as handwashing, water safety, hygiene, menstrual hygiene, or measures beyond the household (e.g., schools and hospitals), then a renewed effort needs to be spearheaded to develop a more comprehensive global monitoring framework for WASH.

Among the WASH implementing community, there is an opportunity to develop standardized methods of measurement and data collection to facilitate a better understanding of progress and expenditures. Through collective action, WASH implementers, together with major funders, can continue to grow and demonstrate their contribution through harmonized measures of progress and service quality. WV is eager to work with its peers to create positive and lasting change.

“We need to develop a common set of definitions of what it is that we are driving for as a sector, and it needs to go beyond solely improved access in order to incorporate sustainability and safety.”

Vice President for Program Excellence of a large WASH implementer
There is a growing global concern around the continued availability of abundant fresh water for societal development. Although robust data on water use (withdrawals and consumption) and quality is often limited—and based on estimations rather than measurements—it is clear that various countries in the world are experiencing increased levels of water scarcity, stress, or vulnerability for both surface water and groundwater supplies. Water availability and its potential societal impact is thus quickly rising to the top of the global risk agenda.

WASH implementers working in those areas where water availability is most stressful (such as fragile or failed states) may find themselves at the forefront of increased tensions between various user groups.

WASH implementers will increasingly face different needs and realities within an increasingly urbanized world. The additional challenges of limited space for construction, accessibility, ineffective urban planning, poor governance of land, and social interaction within communities and populations will require new solutions.

“The increased demand for water, and the conflicts that this causes, is certainly one of the most pressing issues facing the sector today.”

Senior Director of a large WASH implementer
Populations in less developed regions are projected to grow faster than in more developed regions. Although more people are expected to live in urban areas, less developed regions will still face the challenge of providing access to clean water for large rural populations.
6. **APPENDIX:**

Survey summary

**Recipients**

- Thirty-seven organizations involved in the WASH sector participated in the survey, which remained open for 12 weeks after being shared broadly with the global WASH community as well as through personal contacts with leading NGOs and several newsletters with broad reach into implementing NGOs.

- Nineteen percent of the organizations reported working in the sector for more than 20 years.

- More than 50 percent of the respondents have been working in the sector between 4 and 10 years.

- Fourteen percent of the organizations reported providing WASH services for less than five years.

**Reach with access to clean water**

- Approximately 3.5 million recipients were provided with access to clean water in 2013.

- A single implementing organization accounted for 37 percent of those recipients reached in 2013.

- Approximately 5.8 million people were reached with access to clean water in 2014.
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Improved sanitation

- Approximately 4 million recipients (within the survey respondents) were reached with access to improved sanitation in 2013.
- Approximately 4.5 million recipients were reached in 2014 with access to improved sanitation.
- Two implementing organizations account for 83 percent (2013) and 78 percent (2014) of reported recipients.

Handwashing education

- Approximately 13 million recipients were reached with access to community-based handwashing education—an increase of 48 percent from 2013 to 2014.
A total of $117,482,777 was reported in 2013 on all WASH activity among the responding organizations. A 60 percent increase on WASH activity was reported in 2014.
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