



WINGS PEER LEARNING EVENT ON

LOCAL CULTURES OF GIVING: OLD TRADITIONS, CURRENT CONTEXTS, EMERGING TRENDS

MINUTES & OUTPUT OF EVENT / MEETING

November 16 – 18, 2014
Johannesburg, South Africa

Introduction & Background

The challenges addressed by philanthropy are increasingly more complex and globalized. In this context, effective strategies and actions supported by philanthropy must be shaped by the local culture and values, rather than copied from other regions. Support organizations serving philanthropy play a key role in: a) documenting local practices, traditions and discourse, b) learning from and sharing local practices with other regions and countries, and c) sharing this knowledge with philanthropy organizations, donors and private social investors to enable for more strategic action and sustainable results.

The main purpose of the meeting is to bring awareness of the need to reveal trends and document stories, old and new, from all regions including Africa and the Arab Region in the effort of creating a truly global philanthropy enriched with its diversity. We need to remind ourselves of a principle that is often spoken and then ignored - that context matters. The main objective of the meeting is framing the discourse based on local traditions and practices of giving in Africa and Arab region in an effort to understand the diverse and rich practices within global philanthropy

As way of introduction, the participants, in addition to their professional base, each expressed one personal and inspiring philanthropy experience (whether received support or gave support) that left its mark on their life. Summary of those experiences are:

- When did experience take place varied from birth till recent
- Influence included: family member (son, daughter, mother, father or grandparents), one's own community, work context and faith.
- Approach: solidarity & reciprocity (ubuntu), charity, faith institution (for example: church, mosque, synagogue), dealing with root causes (social justice), investment in society.
- Form: volunteering, sharing with others, receiving or given money.

Such rich introduction paved the way for a rich meeting. For list and contacts of participants refer to Annex 1.

Summary of the Various Sessions of the Meeting.

The meeting included several sessions that covered an overarching topic on traditions and local practices of giving. This was followed by three sessions on emerging trends and forms of giving namely: Individual, private sector and community foundations. The meeting was concluded by discussions on the way forward. The detailed agenda is found in Annex 2.

SESSION 1 – LOCAL TRADITIONS, PRACTICES IN GIVING AND CURRENT CONTEXT

This session reflected on historic practices in giving. The interest is not just in history as such but in identifying ways in which those practices have supported the various universal declarations including social justice and therefore shaping the future of Philanthropy in our regions.

The main take from the session was the following:

- Global philanthropy is not uniform but rich in its diversity that need to be well documented and celebrated.
- Trying to impose uniformity in defining global practices will marginalize the many forms of local practices.
- To allow for a platform and space for local practices to be well understood, can be based on the present framework being used and based on one discourse propagated across the world. A completely new form based on diversity needs to be developed.
- Money count to measure size of philanthropy is not representative of its effectiveness. Measures should include how funds are being used and what impact they achieve in terms of dealing of root causes of social problems being tackled. This will contribute to giving the right weight to the rich of philanthropy experiences out there based not just on money contribution but on volunteerism, building solidarity, rely on existing community assets, efforts that emphasize collaboration rather isolationism and protectionism, and innovative approaches of blending social justice values and socially responsible and business practices.
- Faith based giving should be included for social justice work and not kept out of the pool of funds available for such work.
- Local terms of giving should be used as is rather than translated to English. Translation will make those terms lose their deep encompassing meaning.

SESSION 2 – EVOLVING PHILANTHROPY I: COMMUNITY FOUNDATIONS

Community action and solidarity is at the core of society whether in Africa or Arab region. It builds on internal strengths and capitalizes on local assets in responding to needs. The local community owns and drives the agenda. The emerging community foundation movement is giving organized structures to these local informal organizations and capacities. This session shed light on the growth of this emerging movement.

In rewriting the narrative from various regions to describe community based initiatives it was found that a commonality is building: capacity, assets and trust that will strengthen social justice in any one community. The result of the study on the depth of social justice practices in the Arab region was presented as well in the meeting (study is not yet published but will be shared with all once finalized). Also, it was agreed to add the Atlas on Community Foundations to the list of resources available for this group.



SESSION 3 – EVOLVING PHILANTHROPY II: CSI/CSR/CORPORATE GIVING

A new generation of family, business and private sector philanthropic organizations from the “South” are changing the way philanthropy is done. In many cases the delineation of the profit and not for profit activities is not clear. What is the driving force for this group? How are they different? How do the traditional philanthropic organizations interact with this merging group?

This session tried to tackle the questions raised and can be summarized in the following:

- The development of corporate giving does not necessarily follow the smooth curve ranging from pure charity to becoming strategic and building a shared value between donor and recipient of funds.
- Rich experiences were presented where social values guided the investment of corporate funding for example in schools and quality education.
- One should differentiate between giving to meet compliance requirements and giving based on human and social justice values.
- The compliance aspect can have potential negative consequences as the case SA’s Broad-Based Black Economic Empowerment (B-BBEE) requirements as these are focused on income-generation potential and possibly in the process cut out key sectors of civil society including social justice, advocacy etc.
- It is not black and white profit and non profit activities aiming to do social good. This is an emerging field that needs to be carefully considered as it will affect how we do work especially in areas like providing working capital for the poor and youth employment.

SESSION 4 – EVOLVING PHILANTHROPY III: INDIVIDUAL GIVING

A new generation of philanthropists is emerging from the “South” and is changing the way philanthropy is done. They are interested in the transformative potential of philanthropy to bring about social change, by and in focusing on the root causes of social, economic and environmental injustices. These social investors and social entrepreneurs support approaches that are accessible and diverse, bringing various voices and perspectives, while making wide array of resources and ways of learning readily available for social change. What are our experiences? What is emerging? How do people give?

This session tried to tackle the questions raised and can be summarized in the following:

- New or Next Generation givers are activists and need to be involved, not just source of cash.
- There is more consideration to investing private money in financial instruments that respect social justice values.
- There is more risk taking in giving by supporting individuals rather than restricting giving to only registered organizations and funding issues that sometimes rock the boat in society by dealing with the root causes of social problems.
- More emphasis on collaboration
- Encouragement of grantmaking that empowers recipients of funds
- Careful consideration should be given to new mechanisms of funding like crowd funding.
- Before 1994 in South Africa there were loud voices in support of social justice, but this is currently not the case. These voices need to emerge again.

SESSION 5 – THE WAY FORWARD

The group discussed the Next steps for defining the discourses in the Africa and Arab region as part of our effort in defining Global Philanthropy. It was agreed that this should be based on the following:

- How present philanthropy is linked to our heritage?
- Agenda should be agenda of the community.
- Where do we want to see the change?
- Why do we do what we do?
- What has driven us to this point?
- Which agenda are we driving?

Based on this, the participants identified the following key issues that need to be tackled in achieving the objective of this meeting. Also, participants chose the issues they would like to contribute to. In selection it was agreed that no one should choose an issue that is not essential to their daily work to ensure it is achieved and funding for the work does exist within existing operating budgets. This is summarized in the following table.

Key Issues	By
1. Affirm variations of African Philanthropy (Track mixed practices – “chakalaka”)	Southern Africa Trust & AGN
2. Create a platform for practitioners for exchange and cross-learning and define ways to access knowledge on that platform – cross-learning visits.	AGN, WINGS
3. Glossary of words/terms – online that identifies our diversity.	Titania / SACGLF
4. Research and document traditional heritage of philanthropy.	Beulah/ SACGLF
5. Consolidate existing research and identify gaps.	Africa: Southern Africa Trust Arab: Heba
6. Grandmother stories “Document our magic”	SACGLF - Tina, Titania & Beulah; Eva-Liza – Civil Society Found. Namibia, SAGLF
7. Document the heritage and history of WAQF (Endowments) in the Arab region especially where it has supported social justice issues like empowerment of women and inclusion.	Heba, Hania, Naila & Ata + Islamic Relief South Africa (only South Africa)
8. Document stories of philanthropists considering all variations in Arab and African societies: Individual, families, royalties, government, Funds/Trusts, Income Generation by NGOs, corporate giving, social entrepreneurship, "do good" activities, community initiatives at grass-root levels, etc..	Arab region: Heba, Hania, Naila & Ata African Region: Inviolatta = Uluntu Comm. Found, SACGLF



In support of the above table, and specifically point 5, the following list of resources were compiled and will be loaded on the planned platform to be used by this group:

Available Resources African Philanthropy: (*available at WINGS Knowledge Centre)

- ✓ Aina, Tade Akin and Moyo, Bhekinkosi (Eds.). *Giving to Help*. Trust Africa. Senegal: Amalion Publishing, 2013.
- ✓ * *Africa's Wealthy Give Back. A perspective on philanthropic giving by wealthy Africans in sub-Saharan Africa, with a focus on Kenya, Nigeria and South Africa*. Trust Africa, UBS. 2014. Accessed from: http://www.ubs.com/global/en/wealth_management/uhnw/philanthropy-sustainable-investing/philanthropy-advisory/research-and-videos.html
- ✓ Everatt, David; Habib, Adam; Maharaj, Brij and Nyar, Annsilla. "Patterns of Giving in South Africa" in *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 16, No. 3 (2005).
- ✓ Everatt, David and Solanki, Geetesh. *A Nation of Givers Social giving among South Africans*. Durban: Centre for Civil Society, 2005. Accessed from: http://sarpn.org/documents/d0000917/P1015-SA_Social_giving.pdf
- ✓ *Habib, Adam & and Maharaj, Brij (Eds.). *Giving and Solidarity*. Cape Town: HSRC Press, 2008. Accessed from: [http://ccs.ukzn.ac.za/files/Habib%20Maharaj%20Giving_and_Solidarity_-_Entire_eBook\[1\].pdf](http://ccs.ukzn.ac.za/files/Habib%20Maharaj%20Giving_and_Solidarity_-_Entire_eBook[1].pdf)
- ✓ Jones, Sean. *Our World; Our Responsibility. Donor Conference 2010 Summary Report*. Cape Town: Inyathelo, 2011.
- ✓ Gastrow, Shelagh and Vayanos, Anna. *Advancing Philanthropy in SA*. Second Edition. Cape Town: BoE & Inyathelo, 2009. Accessed from: http://www.nedbankprivatewealth.co.za/nedbank_wealth/action/media/downloadFile?media_fileid=371
- ✓ Mitchell, Gillian. *Philanthropy, Power, Partnership and Collaboration Donor Symposium 2011 Summary Report*. Cape Town: Inyathelo, 2012.
- ✓ Peters, Karen (Ed.). *Shifting Perspectives. Private Philanthropy Circle South Africa Donor Symposium Summary Report 2012*. Cape Town: Inyathelo, 2013.
- ✓ * *Philanthropy Insights. Perspectives from South Africa*. Cape Town: Citadel Philanthropy and Inyathelo, 2013. Accessed from: <https://www.citadel.co.za/Media/document/662118a2-4f39-415a-83ee-b21560df0a00.pdf>
- ✓ *Philanthropy SA: Growing Leaders in Giving*. Accessed from: www.philanthropy.org.za
- ✓ * *Sizing the Field – New narratives for African Philosophy*. African Grantmakers Network. 2013. Accessed from: <http://www.africangrantmakersnetwork.org/OpenDocument/71/Sizing-the-Field---New-narratives-for-African-philanthropy>

- ✓ * *Social Justice Philanthropy: Why should it matter?* Based on discussions at a session held at the Annual Philanthropy Conference in Mombasa. East African Association of Grantmakers. 2013. Accessed from:
<https://dl.dropboxusercontent.com/u/46823744/Social%20Justice%20Philanthropy%20Session%20Report%2C%20EAAG%20Conf%20Mombasa.pdf>
- ✓ * *The Giving Report I. A survey on the philanthropy practices of High Net Worth Individuals in South Africa.* Nedbank Private Wealth. 2010. Accessed from:
http://www.nedbankprivatewealth.co.za/nedbank_wealth/action/media/downloadFile?media_fileid=370
- ✓ * *The Giving Report II. A survey on the giving practices of high-net-worth individuals in South Africa.* Nedbank Private Wealth. 2012. Accessed from:
http://www.nedbankprivatewealth.co.za/nedbank_wealth/action/media/downloadFile?media_fileid=1333
- ✓ Wilkinson-Maposa, Susan; Fowler, Alan; Oliver-Evans, Ceri and. Mulenga, Chao F.N. *The Poor Philanthropist: How and why the poor help each other.* Cape Town: UCT, Graduate School of Business, 2005. Accessed from:
http://www.impactalliance.org/ev_en.php?ID=14913_201&ID2=DO_TOPIC
- ✓ Anugo, Vivian N. "Indigenous Philanthropy in South Africa: Trends and Challenges" in *Democracy and Development in South Africa*. 18 June 2013. Accessed from:
http://www.academia.edu/8351278/Indigenous_Philanthropy_in_South_Africa
- ✓ * Moyo, Bhekinkosi. *Transformative Innovations in African Philanthropy.* The Bellagio Initiative. Senegal: TrustAfrica, 2011. Accessed from: <http://www.bellagioinitiative.org/wp-content/uploads/2011/10/Bellagio-Moyo.pdf>

Publications on Africa To come

1. Funding Practice Alliance
(Inyathelo, Social Change Assistance Trust and Community Development Resource Agency)
- Understanding funding flows in SA civil society.
2. Inyathelo: Size and Scope of Institutionalised Philanthropy in SA.
3. EU/SA Treasury: Giving in SA.

CLOSURE

In closure, all expressed satisfaction to the well planned program and thanks were given to the various hosts (venue and dinners). The harmony between Arab and African participants was especially recognized in how enriching it made the discussions. All appreciated the cross learning that took place. The cross learning was effective, commitments to take the discussion forward as expressed in table in previous section, and future links by participants among each other.

List of Participants

Participant	Organization	Country
Aboobaker Manack	Islamic Relief South Africa	South Africa
Adern Nkandela	<i>AGN - African Grantmakers Network</i>	South Africa
Amanda Bloch	<i>Private Philanthropy Circle South Africa</i>	South Africa
Atallah Kuttab	<i>SAANED for Philanthropy Advisory in the Arab Region</i>	Jordan
Bheki Moyo	Southern Africa Trust	South Africa
Colleen du Toit	<i>CAF Southern Africa - Charities Aid Foundation</i>	South Africa
Donné Nicol	Adopt-A-School	South Africa
Eva-Liza Nailenge	The Civil Society Foundation of Namibia	Namibia
Gregorie Muhr	UBS	Switzerland
Hania Aswad	<i>Naseej Foundation</i>	Jordan
Heba Abou Shief	<i>John D. Gerhart Center for Philanthropy and Civic Engagement, American University in Cairo</i>	Egypt
Inviolatta Mpuli	Uluntu Community Foundation	Zimbabwe
Jenny Hodgson	<i>Global Fund for Community Foundations</i>	South Africa
Mamo Mohapi	Mott Foundation	South Africa
Martha Olotu	<i>Foundation for Civil Society</i>	Tanzania
Mathamsanqa Moyo	Community Foundation for the Western Region of Zimbabwe	Zimbabwe
Moipone Buda- Ramatlo	Nelson Mandela Children's Fund	South Africa
Ms. Beulah Fredericks	<i>Southern African Community Grantmakers Leadership Forum (SACGLF)</i>	South Africa
Naila Farouky	Arab Foundations Forum	Jordan
Rebecca Soragni	WINGS	
Shelagh Gastrow	<i>Inyathelo</i>	South Africa
Shona Young	Triologue	South Africa
Taariq Mathiba	Islamic Relief South Africa	South Africa
Tanya Cruz Teller	The Synergos Institute	South Africa
Tina Thiert	<i>WINGS Board member</i>	South Africa
Titania Fernandez-Bailey	<i>Community Chest</i>	South Africa
Vuyiswa Sidzumo	Mott Foundation	South Africa