



**THE SYNERGOS INSTITUTE
THE SOUTHERN AFRICAN COMMUNITY GRANTMAKER
LEADERSHIP COOPERATIVE**

**ANNUAL REPORT
TO THE FORD FOUNDATION**

**REPORTING PERIOD
1 APRIL – 31 DECEMBER 2009**

GRANT AGREEMENT 1085-0837

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Table of Contents

1. Reflections
2. Activities and issues addressed
3. Success indicators
4. Progress towards achievement of goals
5. Organisational/Environmental challenges
6. Organisational/Management challenges
7. Diversity

**LEADERSHIP COOPERATIVE MEMBERS ON THE ANNUAL
RETREAT:**

“The balance of the work was excellent - unlike a learning event where we try to pack in too much into the sessions.” **Tish Heyns, DOCKDA**

“There was adequate space for sharing, interacting and networking.” **Langa Mtshali, Community Law and Rural Development Centre**

I appreciated the book and the questions for reflection. I worked through the book and found it a practical tool and an excellent choice.” **Cassiem Khan, Islamic Relief Worldwide**

1. Reflections

The Southern African Grant makers Leadership Cooperative convened its tenth meeting in November 2008 marking a significant milestone in the growth of the network. The journey taken by network from its inception in November 2005 through its continuation and consolidation phases has been an exciting one. One of the key features has been peer learning and peer support, and a methodology that honours ownership by the members of the objectives, the governing processes and commitment to outcomes.

The network has now reached a stage where other actors have recognised its significance and are reaching out to it to engage in collaboration. Examples include the work of Susan Wilkinson-Maposa on the Poor Philanthropist and the Philanthropic Arc; approaches by the Keystone Accountability to participate in their work; the African Grantmakers Affinity Group’s interest drawing the network into their programmes; the affiliation of the network to WINGS and hosting a WINGS African region peer learning event in 2009 are all indications that the network has begun to carve out a place for itself within the field of grantmaking, philanthropy and a civil society player in the Southern African landscape.

Participation in the network has led to the establishment of a network of Mozambican Foundations in June 2008 and the strengthening of the Lusophone Foundation Network.

The network has shown dynamic growth with new members constantly joining, while some members leaving through succession planning within their own organisation or exiting from the sector.

The dynamic development of the agenda of the network articulates well with the evolving mission of Synergos who seeks to address poverty and inequality through leadership development, inclusive partnerships and collaboration and mobilising the strength of networks.

During 2009, the network will undertake an evaluation of its first four years and develop its strategy for continuation beyond 2010. During 2009, the learning agenda of the Coop will include deepening practice as grantmakers; leadership in the current era; sustainability

of interventions at community level through tools such as Vital Signs and the Philanthropic Arc.

2. Activities and Issues addressed

The Southern African Grant makers Leadership Cooperative convened three times during the reporting period. Two learning events – in April and July 2008 and one retreat November 2008 were held.

The theme for 2008 was ‘sustainability’ thus providing a focus for each learning event:

- Tools for Sustainability – 3 – 5 April 2008;
- Leadership for Sustainability – 19 – 21 July 2008.

The theme for the annual retreat held on 20 – 22 November 2008 was: ‘Reflections on our Leadership Journey’.

Convening group

The programme for each event is conceptualised, planned and implemented by the Convening group comprised of Cooperative members, Synergos staff and a facilitator. During 2008, 10 Coop members served on the Convening group in 12 planning meetings, thus providing their time, insights, expertise and commitment to the life and development of the network. Some members served in two consecutive convening groups.

All members of the Cooperative are encouraged to volunteer for this task, which is enthusiastically undertaken on a rotational basis. This practice allows for the growing ownership of the goals, themes and activities of the network. Cooperative members were also invited to give the input into the development of the themes and programme for each event. Firstly, at the end of each event, ideas and concerns for the following event gathered in a brainstorming session and from evaluation comments. After each planning meeting of the convening group, a proposed programme was sent to members for input and comment. Every effort is made to incorporate the ideas forwarded and address the concerns raised.

Participation

The attendance at events was quite uneven during 2008. The first learning event (April) had a small attendance of only 16 participants, the second (July) had a record 28 participants and the retreat (November) 22 participants. Despite this uneven attendance, the Coop welcomed 9 new members and 5 new member organisations to the network.

New Member Organisations

Mateus Mutemba, Director for Human Development, **Gorongosa National Park Restoration Project, Mozambique – Carr Foundation**

Ronnie Dempers, Director, **Namibian Development Trust**

Mr Langelihle Mtshali (Executive Director), the **Community Law and Rural Development Centre, KwaZulu Natal province.**

Mr. Simanga Sibeko (Secretary General), **Greater Emnambithi/Ladysmith Community Foundation.**

Mr Cassiem Khan (Director), Islamic Relief Worldwide.

New members (changes in leadership at existing member organisations)

Acia Salles, Director for Resource Mobilisation and Communication, FDC, Mozambique;

Ashley Green-Thompson, Grants Manager, Southern Africa Trust.

Enver Moothoosamy, Foundation for Human Rights, South Africa,

Lina Beltran, Lurdes Mutola Foundation, Mozambique.

Issues covered

Under the theme of sustainability the Cooperative addressed a number of issues of concern to Community Grantmakers and social justice practitioners:

- Financial sustainability: case studies on investment vehicles
- Role of BBBEE
- Philanthropy of the poor
- Bridging leadership
- Current political and economic development in Southern Africa
- Leadership in Africa

Learning Tools and resources

- Real-time consulting
- Setting intentions as a means to establish goals
- Reflections on leadership journey
- Development of diagnostic tool – philanthropic arc

Cooperative business and networking activities

Formal business meetings were conducted at each event and the agenda covered topics such as membership issues, report backs by Co-op members from events attended and tasks assigned, upcoming events, formation of groups and assigning of tasks (also for the Synergos office), communication and marketing, and the cooperative beyond 2010.

Networking activities between meetings included ten Co-op members attending the Africa Grantmakers' Affinity Group meeting in Johannesburg in February 2008, and Cape-based members attending the grant.net Network meetings in Cape Town.

Workshops on the further development of the philanthropic arc¹ were held by Susan Wilkinson-Maposa in May 2008 in Cape Town and Mozambique in September 2008. A presentation on the philanthropic arc was also made at the Community Foundations of Canada Conference in November 2008 by members of the CGLC and Susan Wilkinson-Maposa.

¹ The Poor Philanthropist. <http://www.gsb.uct.ac.za/gsbwebb/>

Brochure: a Co-op brochure was developed.

Participation in Synergos dialogue events and convenings: Synergos staff and Cape Town based Co-op members attend the Roundtable Discussion with Amalia Fischer, Synergos Senior Fellow from Brazil on Social justice grantmaking in Brazil and South Africa: Challenges and opportunities (November 2008).

3. Success indicators

- Participation and attendance: An average attendance of 22 participants at events.
- Convening group planning: Enthusiastic involvement of Coop members in convening groups for each event
- A session on the goal setting and goal achievement scheduled at each event with full participation by all members.
- A session to report back on members' networking activities; attendance at conferences as well as information on books, articles and references, upcoming conferences and learning opportunities scheduled at each event.
- Coop participation in the development of the Philanthropic Arc through workshops held in May (Cape Town) and September (Mozambique)
- A discussion on the further development of the Cooperative was included as an agenda item for the business meetings at each event.
- Goals, themes and activities for 2009 were discussed at the November 2008 retreat.

4. Achievement of goals

4.1 Safe spaces for joint learning, reflection, critical thinking, dialogue and leadership development

The three events held by the Cooperative provide the focus for this goal.

The purpose of the annual retreats is to focus more on the sustainability of the leader – through reflection and introspection – allowing for renewal at the end of a busy year. The goal is for leaders to build strategies for renewal and reflection into their leadership practice, to prevent burnout and loss of motivation.

At the November 2008 retreat Coop members shared the following at the retreat:

- *“I feel extremely grateful for the invitation and for who I am and for what I can potentially do for myself. This event brought balance for me, and I realize it is good to feel in touch with yourself.”*
- *“People supported one another, relaxed with one another, connected and laughed with one another. It worked.”*
- *“The spirit of the group was great and welcoming to newcomers.”*

Each event presents an opportunity for grant maker leaders of the Cooperative to share their challenges and successes, seek advice and counsel, and share information thus creating bonds of trust and camaraderie among leaders in the sector. New partnerships, bonds of friendship and common interest are forged during the formal sessions and informal activities.

A number of design elements contribute to creating the safe space for leaders. Each event is conceptualised and planned by a Convening group comprising of Coop members chosen at the previous event. The Convening group buildings on the evaluations and feedback from the previous events; the theme and the content of the previous programme to building an agenda for each peer learning events. Every member of the Coop has had an opportunity at least once to participate in a Convening group. This gives confidence to the members that their concerns and issues are adequately taken into account in the workshops, and contributes to the ownership of the network by the members.

A balance of individual, small group and whole group activities allow for full participation of each member. The emphasis is placed on active learning and dialogue, rather than presentations, lectures and inputs. Additional reading material and resources have been distributed to members at each event.

New members are inducted by existing members in a buddy system, thus allowing for a dynamic network of leaders. During this period, 8 new members were welcomed to the Cooperative. Some new faces from organisations already members; while others representing new organisations to the network.

4.2 Peer network for goal setting and monitoring

The setting of personal, professional and organisational goals forms an important part of the life of the cooperative. Members have the opportunity at each event to reflect on the progress of their goals, are provided with peer counsel and support.

In April, the process of Real-time consulting was introduced as a strategy for peer counselling that could be used by members with each other and in their own organisation. This proved popular and has been introduced as permanent item on the programme at each learning event.

The real-time consulting is conducted by colleagues and the volunteer consultee is able to bring an immediate challenge to the Coop. Other members are able to identify with the challenge and are also able to follow up with the volunteer after the workshop.

4.3 Knowledge exchange; innovation; and strategies for building organisational sustainability

The Cooperative had the opportunity to work with Susan Wilkinson-Maposa on the development of an organisational development tool for the philanthropy sector, the Philanthropic Arc. This culminated in the presentation of the Philanthropic Arc concept at the Council for Foundations International Conference in Montreal, Canada in November 2008. The process involved sessions at the learning events in April and July, workshops with smaller groups of Coop members in May in Cape Town and September

in Maputo. In addition to the making input from practice into a conceptual tool for community grantmakers, it also had the effect of deepening the practice of Coop members.

Financial sustainability also featured strongly in the programme of the learning events during 2008. The case study on Kagiso Trust (April 08), the discussion the Ditikeni Investment Fund (July 08) stimulated further work by members of the Coop on financial sustainability with their Boards. Synergos was able to offer the services of Senior Fellow, Kgotso Schoeman, to provide further input into the Foundation for Community Development, Western Cape and the West Coast Community Foundation.

While financial sustainability is critical to community grantmakers, Coop members are also aware that sustainability of any institution or intervention comprises of a range of elements. This includes the ability of leaders to mobilise resources, to exercise influence over events favourable to the organisations mission; as well as the lasting impact their programmes have on the situation they are addressing. The session on bridging leadership in unequal societies at the learning event in July focussed on the role of the leader, the leader's purpose and how the leader shares and co-creates a vision for an equitable society.

The Coop is in its consolidation phase and has established a number of norms and practices that have contributed to its own sustainability. The members actively participate in the design and implementation of learning events, contribute to joint activities such as the brochure, participate in meetings with key role players, recruitment and induction of new members, membership relationship management, the development of protocols for decision-making, representation and reporting back.

4.4 Improved understanding of the donor environment

Coop members have increased their understanding of the donor environment through a number of activities. A large delegation of Coop members participated in the African Grantmakers Affinity Group annual meeting held in Johannesburg in February 2008. Members of the Coop served on panel discussions, engaged in small group discussion, hosted learning exchanges of delegates. Members provided feedback on the AGAG meeting to the Coop at the April meeting, followed by a lively exchange on the relationships between Northern donors and community or indigenous grant makers in the South.

Similarly, the participation by three Coop members in the Council for Foundations of Canada international conference in Montreal in November has also contributed to an improved understanding of the donor environment. The feedback the members provide each other on their own fundraising strategies, the challenges they face as donors and recipients contribute to building knowledge in on going way. Smaller, younger organisations benefit from contact and interaction with larger, more established ones. Similarly, the regional nature of the membership builds greater understanding of the larger environment in which we all operate.

Participation in the Cooperative has been particularly valuable for Mozambican civil society. In the post civil war era, Mozambican civil society has grown and with this the development of local community grantmakers. The most prominent organisation founded by Mme Graca Machel, the Foundation for Community Development, plays a leading role in the development of Mozambican civil society. The past few years have

seen the launching of new foundations, most notably, the Maria Lurdes Mutola Foundation established by the well-known Mozambican athlete, Maria Mutola. Inspired by the Southern African grantmakers Cooperative, the Mozambican colleagues have established a forum for Mozambican foundations, comprising both local and Mozambican based international foundations. Their purpose is to promote a culture of philanthropy in Mozambique and to create an enabling environment for local philanthropy to flourish.

4.5 Continuation of the project and planned activities for 2009.

The Southern African Grantmakers Leadership Cooperative will continue to operate in 2009, with two learning events and one annual retreat planned for the year. In addition, the Cooperative members will be invited to apply to the proposed Bridging Leadership Introductory course to be offered by Synergos in Southern Africa to its networks.

The question of measuring the impact of their work with communities on the ground is one that has exercised the minds of community grantmakers. In this regard, great interest has been shown in the Vital Signs work being conducted in Canada and Brazil (www.vitalsignscanada.ca) and the opportunities it represents for community grantmakers to track progress made on social justice and the eradication of poverty. The measurement of impact and transformation will be included in the learning agenda of the Coop during 2009

The additional capacity of the part-time co-ordinator will contribute to improved communication between learning events, follow up activities of the working groups and information exchange between members.

Cooperative members will represent the network at the annual AGAG meeting to be held in 23-25 February 2009 in the US. A proposed topic, 'Invest where the poor are willing to invest' - submitted by one of our members, Tina Thiart, to the European Foundation Council for 20th Annual General Assembly and Conference to be held in Rome in May 2009 by Tina Thiart one of the Coop members, has been selected as one of 14 possible topics to 'voted on' by participants for inclusion in the programme.

Cooperative members will participate in the Peer Learning Event planned by WINGS (Worldwide Initiatives for Grantmaker Support) Global Fund for Community Foundations in South Africa in July 2009, as well as host members of the WINGS Co-ordinating at the Annual Retreat in November 2009. The Co-op affiliation with WINGS provides an important networking link to similar networks around the world and has already contributed to the knowledge and information within the network.

During 2009, the Co-op will undertake a review and evaluation of first two phases of the project with a view to defining its strategic direction beyond 2010. Already, the Co-op has established itself as a network that represents the interests of the community grantmaker sector within civil society.

5. Organisational/Environmental Changes

The appointment of a part-time co-ordinator for the Coop has already enhanced our capacity to provide improved support to the Coop, in particular to harness the potential

of the network in its interaction between learning events; web-based resource sharing and networking; and on going network building.

The current global and national economic crisis has begun to impact on the Coop members and the communities they serve. Leaders shared how the decreased flow of resources, in particular from international donors, has already begun to impact on their work. Priorities are shifting from strategic issues such as social justice, human rights, gender equality to the provision of basic needs.

These developments emphasis the importance of what the Coop endeavours to do for members and the sector more broadly – provide a safe-space to engage in these challenges, develop strategies to address the changing environment; set goals and review priorities.

6. Organisational or Management Challenges

There have been no significant organisational or management challenges during the reporting period that would impact negatively on the organisation’s ability to engage effectively at programme or financial levels.

7. Diversity

The diversity table for Synergos has been updated to reflect the recruitment of an additional board member, and a part-time staff member.

	Underrepresented		Total	
	Male ²	Female	Male	Female
Board	2	5	3	5
Professional staff	0	1	1	1
Support staff	0	2	0	3

² Further Board recruitment in 2009 will increase the number under this category to 3.

Annexures

Participating grantmaking organizations in the **Southern African Community Grantmaker Leadership Cooperative** include:

- The Nelson Mandela Children’s Fund
- The Social Change Assistance Trust
- The Kagiso Trust
- The WHEAT Trust
- Community Development Trust of the Western Cape
- The Ikhala Trust
- Catholic Welfare and Development
- Dockda Rural Development Agency
- The AIDS Foundation
- The Foundation for Human Rights
- Uthungulu Community Foundation
- Greater Rustenburg Community Foundation
- Greater Durban Community Foundation
- The West Coast Community Foundation
- Atok Community Foundation
- Rural Educational Access Programme
- The Steve Biko Foundation
- The Southern Africa Trust
- Adopt a School Foundation
- The Foundation for Community Development (Mozambique)
- The Maria de Lurdes Mutola Foundation (Mozambique)
- The Community Foundation for the Western Region of Zimbabwe
- The Multi-Agency Grantmaking Initiative
- The Community Chest – Western Cape
- The Gorongosa National Park Restoration Project, Mozambique
- The Namibian Development Trust
- Islamic Relief Worldwide, Southern Africa
- Community Law and Rural Development Centre
- The Greater Emnambithi/Ladysmith Community Foundation