

Global Partnerships Podcast Series

Host: Ted Hart | President & CEO, CAF America

Guests: Gill Bates | CEO, CAF Southern Africa

Announcer: Learn how to take your caring and giving farther with the *Caring and Funding* Podcast powered by CAF America. CAF America, America's leader in cross-border philanthropy, helps corporations, foundations, wealth advisors, and individuals who wish to give internationally and with enhanced due diligence in the United States. Through its industry-leading grants management program and philanthropic advisory services, CAF America helps donors amplify their impact and ensure their gifts are made in a safe and effective manner.

This *Caring and Funding* Podcast is dedicated to these donors and the charities they support. Our guests are leaders in their field who join us to share tips for success and stories that inspire. Our host is Ted Hart, the CEO of CAF America. After the show, you can find all our podcasts at cafamerica.org on iTunes and now just say, "Alexa, play C-A-F America" on TuneIn. Now, welcome the host of CAF America's *Caring and Funding* Podcast, Ted Hart.

Ted Hart: Welcome to the *Caring and Funding* Podcast. CAF America's global partnerships enable carefully chosen teams around the world to bring together the very best of talents and strengths. In today's world philanthropy often moves at the speed of the internet, even if the human condition has not yet learned to heal, or grow, or change, or rebuild, or a host of other things that philanthropy can and will address at that same lightning speed.

CAF America's global partnerships enable us to bridge those great divides by bringing to the American donor, the very best of philanthropic expertise and services on the ground in countries around the world. Through this podcast series, we introduce our listeners, our donors, to partners we collaborate with, partners who collaborate with us in making it possible for that long arc of history, that long arc of philanthropic change to bend a little faster, with much more assurance and with full regulatory compliance, risk management, and regulatory compliance you have come to rely on from CAF America.

Today on this special edition of the *Caring and Funding* Podcast, it is my pleasure to introduce you to Gill Bates, Chief Executive Officer of CAF Southern Africa. CAF Southern Africa is a member of the CAF Global Alliance and our partner in South Africa. Established in 2000, CAFSA is a registered nonprofit and public benefit organization that is proudly South African.

CAF Southern Africa believes that giving and other forms of social investment by companies, institutions, and individuals is a vital component to strengthen the effectiveness of civil society in supporting under-resourced communities. CAFSA, as they are often known, facilitates financial and associated philanthropic support to nonprofit organizations in the southern Africa region and is committed to advancing and adding value to these contributions by promoting innovation, fostering leadership, and encouraging cooperation.

CAFSA encourages a vibrant philanthropic culture throughout South Africa, defining philanthropy as encompassing all forms of corporate, private, and individual giving, including volunteering.

CAFSA believes that civil society organizations play critical roles in providing relief from all the ills associated with poverty and marginalization. Gill Bates assumed the role of CAF Southern Africa's Chief Executive Officer in January 2017. She has some 25 years of experience working in corporate and nonprofit space. As a corporate social investment specialist, she has managed the trust and foundations of a number of blue chip entities listed on the Johannesburg Stock Exchange.

She has had extensive experience in the financial services sector, working always in the corporate social investment area. Her experience includes governance and compliance, Broad-Based Black Economic Empowerment scorecard consulting, stability, reporting, monitoring, evaluation, and reporting, research, policy formulation and implementation, strategy formulation and implementation, program and project management, and fundraising. In other words, she really knows her stuff.

Gill is also a part-time facilitator at Johannesburg Business School and holds a bachelor's degree in psychology and social work, an honors degree in education, social work, and a master's degree in public and development management. The first thing that you'll know about Gill Bates when you meet her is that she always greets you as a colleague. Today, I have the pleasure of greeting Gill Bates, CEO of CAF Southern Africa, here to the *Caring and Funding* podcast as our special guest within this global partnership series. Hello, colleague.

Gill Bates: Very good morning to you, Ted, my colleague, and to your listeners. Thank you so much for inviting me onto your program. It's such a great pleasure for me to be with you this morning.

Ted: Gill, there are wonderful cultural ties that have brought Americans and South Africans together over many years, and for decades Americans and South African liberation movements have shared a common spirit, yearning for freedom. The CAF America and CAF Southern Africa partnership build upon the strengths of both our organizations while weaving in their unique cultures and strength of spirits.

I wanted to first today, start talking about a wonderful visit that you were able to put together and something that will forever stay with me is my opportunity to meet Elinor Sisulu. I was wondering if you would tell the story of the Sisulu family, but more importantly, the important work that CAF Southern Africa does in providing service for family trusts in South Africa.

Gill: Indeed, Ted. In fact, CAFSA was equally honored to receive you in South Africa and to be able to facilitate the meeting with yourself and Elinor Sisulu. It's forever etched in our memories at CAFSA as well. We were very, very deeply moved and honored to be contacted by the children of the family, Ted, to support them on the establishment of the Walter and Albertina Sisulu Centenary Fund.

Ted, as you well know, Walter Sisulu was a lifelong confidant and a friend of Nelson Mandela. He was part of the Rivonia treason trialists, along with Nelson Mandela, who were imprisoned on Robben Island as anti-apartheid activists and leaders of the Vein Band ANC. Mama Albertina Sisulu, continued to care for her family and neighbors during her husband's very lengthy

incarceration. She was a respected nurse and a community worker in Soweto, where you visited with us, and she held an abiding passion and a deep empathy for human suffering as a nurse, Ted.

The Sisulu family wanted to establish this legacy foundation on the eve of what would have been Mama Albertina Sisulu's 100th birthday in order to honor the contribution and the many sacrifices made by their parents, and to support the ongoing **[inaudible]**. The CAFSA was privileged to support the family in terms of setting up the fund and then moving on to thinking about programmatic work with the family. I was so honored when I was invited to attend the official launch of the Albertina Sisulu bursary fund for nurses, Ted, which I think could not be more timely in our world at the moment, so a great honor all round.

Ted: Of course this worked at CAF Southern Africa does on behalf of the Sisulu family and the ability of CAF Southern Africa to host and maintain family trusts throughout South Africa builds upon a South African tradition of philanthropic culture around a concept of Ubuntu. Can you share with us that South African context?

Gill Bates: I can. I think that you're absolutely spot on. I think that Africa, since time immemorial, has effectively blocked the **[inaudible]** from Zulu is, a person is a person through other people. This philosophy really stresses compassion and humanity and are being upheld simply to others. Effectively, I am because you are. It's about community. It's about helping and assisting and supporting.

I think this philosophy is really strongly demonstrated in the various pieces of research that the CAF Global Alliance and CAFSA, and indeed CAF America has done in respect to the generosity patterns within Africa and Southern Africa. It's abundantly clear from the research that the poorest of the poor told you, as a philosophy, our country and our continent is generous by nature, and people share what very little they have. And in fact this really links to some anecdotal evidence we picked up from Robben Island where Walter Sisulu was imprisoned. If any fellow prisoners needed a pen or some toothpaste, for example, Sisulu would always give his meager possessions to his friends. I think that really speaks to the philosophy of generosity on the continent and in the country too.

Tim: There's another proverb, another South African proverb that I've often shared and speaks particularly, I think, to Americans' understanding of South Africa. If you want to go fast, go alone. If you want to go far, go together. Share a little bit of how you've been experiencing that of recent, in terms of how people have come together in both wanting to make things go fast, but also the ability to make things really happen when more people come together.

Gill: That really encompasses where we are at the moment as we face this global COVID-19 pandemic. It's been said we might all be in the same storm, but we're not in the same boat. I think in South Africa, we are seeing an outpouring of generosity, of assistance. I'm seeing it on our social media platforms, the generosity that is pouring out from South Africans, both individuals, wealthy, across all classes and from the corporate sector. The country has been massive in dealing with this crisis and constantly being mindful of the needs of those least fortunate.

We set up our COVID-19 emergency funds to deal with the crisis. We are seeing corporate stepping forward to assist with personal protective equipment. There is a real crisis in the country alongside COVID-19, and that is rising levels of starvation. The focus in the state of our philanthropy and our giving at the moment is to deal with the spiring levels of starvation in the country, Ted.

Ted: That's heartbreaking to have what has really been an issue in South Africa become such a fault line during the COVID outbreak. Gill, CAF Southern Africa has been in the forefront of so many different topics facing South Africans. I wanted to shift the discussion if we could, to one way that so many corporations are coming together in South Africa and have for so many years to really make a difference in their communities and to really help their communities. CAF Southern Africa has played an important role in neighborhoods throughout South Africa through the Beyond Painting Classrooms program.

This has really been bringing together a lot of corporate support. FirstRand Bank has taken a leadership role in this. This really speaks to American corporations who feel that oftentimes they would like to make a difference in the communities that they are involved with. How can Beyond Painting Classrooms be an example for corporations that might want to become involved in South Africa?

Gill: Ted, this is a lovely question and a lovely project indeed. We are thankful to have partnered with FirstRand, which as you say, is one of South Africa's top four banks. We have been privileged to work together with our colleagues at the FirstRand volunteers program. This employee volunteering initiative previously known as Beyond Painting Classrooms, which I think really speaks of the real intention to just not be a volunteer for half a day or a day and then move away and not come back again for another year.

[inaudible] brings together corporates in a really collaborative space in order to share the knowledge and best practice to enhance the power and the impact of volunteering, which you've spoken about, and which research has shown us, Ted, that this kind of employee volunteering not only benefits the charity, it also benefits the corporates and its employees too. Effectively, this collaboration really creates the perfect storm. Historically, FirstRand supported by CAFSA has an employee volunteering or a BTC conference every second year in Johannesburg, where we offer quality local and international speakers who are experts in their field.

There are plenary discussions, panel discussions, breakaway sessions, in order really to build a repository of knowledge and practice to support the employee volunteering ecosystem. This is a premier gathering of practitioners. In December last year, we held our conferences, the one that was in Johannesburg, we were thrilled **[inaudible]** we have some lovely themes including making employee volunteering towns, collaborating for change, and the future of employee volunteering. It's really the corporates and the charity got around the table to share learnings and how we can really make volunteering powerful as a contributor and as a currency.

In fact, earlier this year, BTC has now been rebranded as Inspiring Employee Volunteering, which we think is a really powerful brand, and it's continued with this important work. Our COVID-19

webinar which was hosted very recently, invited speakers from the corporate world and the charity world to present on how they've had to repurpose the original volunteer strategy, Ted, and some very interesting things that we see, both in South Africa and at FirstRand during the COVID pandemic include a rise in humanitarian support.

I think you spoke about the donations of food and food parcels - sometimes it hasn't been enough to provide only **[inaudible]** personal protective equipment. Ted, virtual volunteering is obviously now on the rise. We see increasing fundraising events for humanitarian support. In fact, FirstRand have just launched their active citizenship campaign to reward random acts of kindness. This really is indeed a great opportunity for corporates to really reach out and make a contribution into the nonprofit sector in South Africa.

Ted: Through this podcast, Americans are learning just what a strong partner CAF Southern Africa is in South Africa. We're going to take a very quick break and when we come back, I want to follow up on the volunteering aspects that CAF Southern Africa is able to facilitate and talk about the very powerful role that employee payroll giving can play and the funds that that generates and how much good that creates in South Africa and we'll be right back.

Announcer: Remember, our podcasts and archives are always available 24 hours a day at cafamerica.org on iTunes or just say, "Alexa, play C-A-F America" on TuneIn. Now, back to the *Caring and Funding* podcast and our host, Ted Hart.

Ted: We're back here with Gill Bates, the CEO of CAF Southern Africa. Before we stepped away there, Gill, I just wanted to ask you as we come back here to talk about what we would refer to as employee payroll giving in South Africa that's referred to as, "give as you earn program." This is another part of the rich offering of CAF Southern Africa. Help us understand how that works and more importantly, why it's so important.

Gill: Thank you, Ted. This is a lovely question and we are really super proud of the program. Ted, effectively, it's a quick and efficient way for both employers and employees alike, to help civil society in a really impactful and thoughtful way. **[inaudible]** a simple system or supported by processes, which allows employees to donate a portion of their monthly income to a charitable cause close to their heart. In many instances, Ted, the beauty of this program is that the corporate will match the employee donations. In effect, both contributions are being paid over to CAFSA and we ensure that those funds are transferred to the nominated charities.

Which CAFSA also by the way would have vetted via our due diligence process, and that's providing comfort to the donor. Ted, as you mentioned the value of this program lies, I would think, not only in the operational efficiency and safety, but ultimately in terms of the value and the resources that are being unlocked for civil society, nonprofit charities. Effectively, Ted, payroll giving funds are unrestricted funds, which are especially required by charities during the COVID-19 pandemic. In fact, Ted, I'm happy to share with you that **[inaudible]** of 14 million rand, which can be distributed to some 300 South African charities. This is really a great opportunity for corporates, including US companies in South Africa, to make a really valuable and impactful contribution to charities in Southern Africa, Ted.

Ted: These donations make such a big difference to so many different charities and really become the lifeblood of many different communities and many different charities. Gill, sometimes corporations, foundations who want to make a difference, don't know which charities to work with. They don't know what kind of program they want to put together. Can you talk to us about some of the services that CAF Southern Africa can provide about creating programs from start to finish, helping a foundation or corporation think through what they would like to accomplish and how they might accomplish that? Give us an example of how CAF Southern Africa has maybe done that.

Gill: Ted, this is really an area that CAFSA has developed a deep expertise in. Really just assisting our corporates to think very strategically about their payroll giving programs. Most recently, we have worked with a client in the mining sector whose program had been a bit dormant because there were some changes in the particular company. Also, the restructuring the company approached us to help them think about their payroll giving programs, think about policies, strategies, and how to communicate with their employees in terms of the value of this program, and where their money could go.

As you correctly say, in some instances, employees and corporates don't know where they want their money to go, in which case, we will advise them, looking at the company strategy, and obviously linking up to CSR strategies. It's really, as you say, as we enter into it, that's where you really start getting around the table and talking about policy and strategy. Then just operationalizing the entire payroll giving program from start to finish. It's a headache we posted, Ted, corporates and employees know that these funds are safe and that they are going to where they need to go.

As you say, it's a comprehensive strategy and process with a lot of thinking time to make sure that the program that we design really is customized for a particular corporate, Ted.

Ted: That's terrific. CAF Southern Africa also provides these services in a grants management setting as well, helping foundations, corporations, from start to finish, putting a project together, and then overseeing project implementation. Can you give us an example for our listeners for our donors, on how CAF Southern Africa might help with that?

Gill: Absolutely, Ted. You've raised the question in that last year, CAFSA was approached by the Cotton On Foundation, which is the philanthropic arm of the Australian-born fashion retailer Cotton On group. The foundation works directly with communities in need and the focus is on delivering quality education projects in the countries where the group operates. That could be Uganda, South Africa, Thailand, and Australia. The thinking behind the philanthropic arm is, Ted, that Cotton On recognizes that, in order to make a sustainable and lasting impact that really helps to reduce global poverty, we really need to identify all factors contributing to systemic policies.

The thinking of Cotton On is that every single child has the right to quality education, regardless of the country of their birth, the language that they speak, or, for example, the country that they live in. The purpose really is to build education [inaudible] of Africa for a number of years have been

engaging with an impoverished community called Ethekwini and really looking at how they could help in terms of supporting this community.

One particular school, the Ethekwini Primary School came to the attention of Cotton On. It was in desperate need of a rebuild, of refurbishing, and a set point that Cotton On approached CAFSA with some fund management support. Just to support them during the build and the refurbishment, dealing with all the various service providers involved in refurbishing the school, CAFSA received the donation from Cotton On, and we then made sure that all the building surveyors, the architects, the construction engineers, et cetera, were paid on time and in accordance with the project program.

We ensured all the regulatory compliance value of the renovation and build, Ted, worth 29 million rand. I have to tell you that it was such a privilege for me to be invited in November last year to travel to **[inaudible]** to attend the opening of the Ethekwini Primary School or the relaunch of the new building and it was incredible to see 16 refurbished classrooms and additional 16 brand new classrooms built and the administration block was built. They were able to build two kitchens and two fully-equipped playgrounds and ablution block. This really is a wonderful example of a corporate doing great things in South Africa, Ted.

Ted: Well, Gill, it's those sights and sounds. Every time I speak with you when I have an opportunity to visit with you that there always is the sights and sounds of South Africa. Then just in this podcast the opportunity to have the memories of Eleanor Sisulu, the Susulu family, and the travels that we've had, we've also had an opportunity to discuss Ubuntu and the service offerings of CAF Southern Africa.

We only have a couple of minutes left and we can't possibly have a discussion about philanthropic traditions in South Africa without talking about the legacy of Nelson Mandela. Can you finish up our podcast here by telling us about what Americans should know about the proper philanthropic legacy of Nelson Mandela?

Gill: Thank you so much, Ted, and what a beautiful way to conclude today's discussion. This is an especially pertinent time for us in South Africa, Ted, as we observe Mandela month. We celebrate the birth of Nelson Mandela on the 18th of July. As you all know, Mandela International Day was launched back in the year 2009 by a unanimous decision at the UN General Assembly, and it's been in effect ever since. The reason for Mandela Day is to mark the 67 years that Madiba spent really making the world a better place.

We are called upon to spend one minute for each year doing something good for those most in need in our communities. Much has been written and said about our icon Nelson Mandela and really just to wrap up, I think, to conclude that everything that he was, he was also fundamentally a philanthropist, Ted. Nelson Mandela donated one-third of his presidential salary to the Nelson Mandela Children's Fund but obviously his interests remain very broad and included a focus on HIV and AIDS, eradicating poverty and hunger. He also had a great passion for children and supporting local authors.

Madiba was very passionate about freedom, democracy, social justice, and service to others. We're really privileged to observe Mandela Month in South Africa and internationally.

Ted: Gill, it's a privilege to have you here on the *Caring and Funding* podcast. Thank you for being our guest.

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