

Turning Knowledge into Action: Revisiting the IGS

Host: Ted Hart

Guest: Ulrika Friesen - Cisco

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Announcer: Welcome to the *CAF America Radio Network*. A production of the Charities Aid Foundation of America. As the leader in global giving, CAF America offers more than 20 years of experience and expertise to corporations, foundations, and individuals who wish to give internationally and with enhanced due diligence in the United States. Through its industry-leading grant management programs and philanthropic advisory services, CAF America helps donors amplify their impact. This show is dedicated to these donors and the charities they support.

CAF America is uniquely positioned to serve as the bridge between these important partners and transforms vision into meaningful action. Guests on the *CAF America Radio Network* are leaders in their field who share tips for success and stories that inspire. Our host is Ted Hart, the CEO of the Charities Aid Foundation of America. This is a live call-in show. Add your voice by calling 9-1-4-3-3-8-0-8-5-5. After the show, you can find all of our podcasts at cafamerica.org. Don't forget to dial 9-1-4-3-3-8-0-8-5-5. Now, welcome the host of the *CAF America Radio Network*, Ted Hart.

Ted: Welcome to this latest edition of the *CAF America Radio Network*. Thank you for joining us today. We have a very important topic and of course, that is International Grant Making. Today we have two experts in their field who are going to help us do a recap of the International Grantmaking Symposium that was held by CAF America last month at United Nations headquarters in New York City.

We're going to go with ladies first. We have with us on the show Ulrika Friesen who is a key member of the Cisco Foundations employee matching gifts program team responsible along with CAF America and other partners for organizing, vetting, and policy review. She also provides monthly financial reporting to the foundation and our partners. In addition to these responsibilities, Ulrika is a project manager for a key recycling and sustainability project as Cisco's corporate affairs organization. Ulrika has been with Cisco for seven years and is passionate about volunteering in her free time. More importantly, she's here with us right now. I want to welcome here to the *CAF America Radio Network*. Ulrika Friesen, welcome.

Ulrika: Thank you. Hello.

Ted: Ulrika, we have another guest who's going to join us here on the show as well, Anuar Juraidini is grants manager at the Citi Foundation. He's responsible for grants administration, information management, analysis and reporting, and IT management. Most recently Anuar led the implementation of technology and process enhancements for grants management operations as well as the execution of business analytics and grant impact assessment for the foundation. He holds a BA in Philosophy and Economics from Fordham University and an MPA from Columbia University. Welcome here to the *CAF America Radio Network*, Anuar Juraidini.

Anuar: Hello. Thank you for having me today.

Ted: Well, it's great to have you both here on the show. Our topic today as I mentioned at the top of the show is a very important one and that is a bit of a recap revisiting the information that was learned at the IGS. What we call the IGS, International Grantmaking Symposium held last month, United Nations headquarters. I'm going to ask each of you-- Let's start off with just your impressions of the IGS and where you feel that fits in the training cycle if you will. Let's start off with Ulrika.

Ulrika: Thank you. For starters, I found that it was extremely fitting that we had this year's IGS at the UN headquarters. They're the heart of philanthropy and being there to learn more about philanthropy in the SDGs that they have was so fitting and just made it super exciting to be there and to be able to learn more about what's available to do for different organizations throughout the world.

Ted: Yes. We want to get into those details. Quite a good mix of people attending and great information. Anuar, what were your impressions?

Anuar: Yes, I think I'll echo Ulrika's sentiment and say that the IGS provided us with a great opportunity to come in and really learn about some of the newer trends in international grantmaking coming from the perspective of a multinational corporation. It was very helpful to be able to come in and sit in some of the sessions around compliance, due diligence and what some of the regulatory new climate, faith in philanthropy voice. For us it was a great opportunity to really sit in, take it, take some time to learn about the new trends and really learn about what we need to be doing more of, what the best practices are and what other organizations like ours are doing.

Ted: Certainly some of the things that we were hoping to accomplish. One of the things that Ulrika brought up I wanted to just explore a little bit further with you. In September of last year, world leaders agreed to adopt a set of 17 goals which have become known as the SDGs or the Sustainable Development Goals in an effort to combat poverty, social inequality, climate change and many other goals for our planet. You mentioned Ulrika that this was not only fitting for the IGS to be held at the United Nations, but a part of that was because of the focus that we have this year on the SDGs. Talk to our audience a little bit more about why you felt that was important and what does this say about the future of international giving?

Ulrika: Well, I would say that it was important just to learn what focus areas the UN has set out for helping those in need so that we're really getting a better understanding of what needs to be done and being able to have these focus areas helps organizations like Cisco to be able to really have a deep engagement with some of those areas.

Ted: I agree. Anuar, how do you feel that these SDGs they are new? We're just going to be coming up on a year since their adoption. Is this still a learning phase that you believe is important for all of your national grantmakers? Whereas is this set to a certain level of giving?

Anuar: I absolutely agree it's learning phase. I think when thinking about the Sustainable Development Goals, we can- philanthropy can and should and can look at them as a framework under which we can continue to pursue our work so that it's not an isolated effort. I think the Sustainable Development Goals, and this might be over-simplistic to say, but it's really a global effort that calls for cross-sector collaboration, new innovation to really solve the challenges that the world as a whole is facing.

For philanthropy, we can see our role in pursuing these goals and continuing our work, but under a framework that makes it more impactful and allows us to add it up to an effort that is not isolated to us.

Ted: Right. I think in the past, while there certainly been efforts in that area, the ability to now have your own activities, they have them measured with and against other activities on a global scale does set a different level of impactfulness and we believe can also help provide some markers for future training. That's why Ulrika, CAF America has made a commitment to be a global leader in training on the SDGs and to providing access to information on how best practices can be learned across sectors.

Both you and Anuar represent corporate foundations and you know that to have a robust corporate philanthropic strategy, you have to understand the fundamentals of International Grant Making. In addition to the SDGs which help set global markers, talk a little bit about- back to the IGS, in terms of before you get to effectiveness on the SDGs, there are some basics you got to now.

Ulrika: Agreed. I think that the IGS was really informative for me personally as I'm relatively new to working with Cisco's corporate foundation and there were a lot of takeaways that I had after coming back and being able to use this knowledge that I learned. There were things everywhere from simple definitions such as what ER and ED stand for versus just understanding what CAF America does for Cisco as our intermediary and how the funds are dispersed to the NGOs.

I had to say it was a lot of information that I really am utilizing each day since I've gotten back.

Ted: Well, you make us smile when you say things like that Ulrika, Anuar, to the basics of grantmaking, one of the things that is often a hurdle for a lot of folks who are either new to the international grantmaking space or have been in it but didn't know exactly what the details were, they come at it wanting it to be as simple as writing a check and sending it to a charity as it would be in the US and it's simply not.

Do you want to talk a little bit about what you know and what you've learned and the role of an IGS in terms of helping provide a common framework for which international grantmaking can be done effectively, safe and regulatory compliant?

Anuar: Definitely, yes. I think I definitely see where you're coming from in terms of understanding. You have to have the understanding of the Sustainable Development Goals and also what you're working towards, but ultimately there's so much that has to come before

getting to that point that it's just as important and that's really where the groundwork is set. Understanding what regulations you have to comply as a grantmaker, having those correct due diligence processes in place so that you're finding the right partners, partners that will see the work carried out, partners that are eligible for funding, having good understanding of AML regulations that you have to abide by, having good understanding of what the regulatory climate of the country in which you're working in so that you are abiding by the right regulations.

Definitely there is a lot of groundwork that takes place prior to even considering the goals that you're working towards and as a grantmaker we work really hard to stay on top of what those changing environments are and I think the IGS provided a great forum for us to really come in and see what those changes are, what those strengths are, learning more about the work that we do and what has to happen before that work takes place.

Even as a refresher, our organization has been doing this for a while and I've been doing this for a while but just being able to come in and really take time refresh on what the right processes in place need to be was certainly a very good opportunity for us.

Ted: Thank you for saying that. It's complex. There's a lot of moving pieces and so sometimes as you said giving a refresher or just having the time out to think of the big picture and all of the moving pieces all on one place is often the luxury that a lot of senior executives like yourselves don't often get. Having that time away to immerse yourself in the changes and what's new but also just a refresher on the basics.

Anuar you kind of set me up for a question that I've been dying to ask Ulrika because I often feel that you have such a difficult position or at least a challenging position in the work that you do with matching gift programs because of course, just as Anuar said, we live in breath international giving and the complexity of regulatory compliance and that's what we do.

Of course, everything that we do for our donor clients is to streamline that process and to try to take away as much of the complexity as we can but when you are in a matching gift situation, it's not just our relationship with you and your office and the work that you're doing, Ulrika, but you have employees who are asking questions of you in terms of delays and when the answer is about regulatory compliance and anti-money laundering and national standards in other countries and compliance and all things like that, I imagine that those answers are not always entirely satisfying to the people who just wanted the money to move tomorrow.

Ulrika: You're correct, it's not. It is at times difficult to explain some of the situations that we have to work with and around with having to deal with non-US governmental situations in areas but they are understanding in the end. Sometimes it may take a little bit of time to explain and we just spend the time with employees to explain to them that we're doing the best for not only Cisco but for the non-profit organizations that they're choosing to support.

Ted: Does a program like the IGS help arm you with the ready answers that help you make that case?

Ulrika: It sure does. It really made it so that I had a better in-depth understanding of the things that are happening behind the scenes that I might not see specifically but then that I can relay that kind of information to our employees so that they also have a better understanding of what we're doing.

Ted: Absolutely. We're going to take just a very quick break here and when we come back, Anuar, I wanted to just ask you to reflect on one of the areas of growth. CAF America has grown a hundred and sixty eight percent in the last four years and certainly, the area of corporate giving continues to grow. You're with a bank and banks are often some of the biggest players on the international grantmaking space and their role looks to be increasing over time and I wondered if you might reflect on that and we'll be right back.

Announcer: Remember our podcasts and archives are always available 24 hours a day at cafamerica.org. If you're listening today, our phone lines are open. Call in and ask a question by dialing 9-1-4-3-3-8-0-8-5-5. Now, back to the *CAF America Radio Network* and our host Ted Hart.

Ted: We're back here live with Anuar Juraidini who is Grants Manager at Citi Foundation and Ulrika Friesen who is an analyst at Cisco. Just as we went on a quick break Anuar I was just posing this question of the important nature of banks and how it seems that grantmaking continues to grow. Do you want to reflect on that a bit?

Anuar: Yes, thank you. I think when looking at the role that grantmaking plays within our organization, we certainly see that growth. We see the need is always there and I think for a bank it is important to continue to evolve a grantmaking, to continue to evolve it in a way that continues to fulfill their needs. I certainly agree with you. I think there's also an emphasis in making sure that it's not just a grantmaking that's pushing citizenship mission, that corporate responsibility strategy.

I think it's equally important that for our impact to be scalable and to have the business activity also drive the admission. For us, I think, the focus is not just an evolving or grantmaking but actually working to really embed our citizenship efforts into the day to day business activity of the company because that's where we see our impact being magnified in a way that it's a scalable and has real depth to it.

Ted: I agree with you. Ulrika, I was wondering-- I was talking to someone the other day who was talking about the difference between for-profits and non-profits. This particular person made the case that from his perspective it was far easier to be a for-profit than to be a non-profit because the only thing you have to do to be successful is to make a profit. I don't know if that's entirely true today. Certainly, making a profit is the goal but increasingly people are expecting corporations to provide more of an example of social responsibility in developments and certainly environmental impact.

Is it just as simple for company to make a profit and that's good enough or is there more to it for corporations and does that bring them into more of a partnership with the SDGs?

Ulrika: I definitely think there's more to it. It's not just about making money. It's about being-doing the right thing for our community, our world. Just like you said doing sustainable items. We want to be able to not just make that money but be able to do the right thing. I think having the SDGs really helps corporations focus on areas that they feel that they can do the best at.

Ted: I think my next question is for both of you. If you would both reflect because Ulrika you just brought up, I think, a very important point and it's been raised on the show a couple of times and that's the role of employees in corporate philanthropy. That's changed over the last decade. Can the two of you, and Ulrika, we'll start with you since you rightfully raised the issue. How has it changed? Why has it changed and what does it say about the future?

Ulrika: Well, I would say that have people become more aware of- I want- for lack of a better word, their surroundings and what we need to do to make this world a better place. It sounds a little simplistic but to me that's the heart of it. We just want to be in a better place. People see that and know that corporations have almost more bandwidth or more reach to be able to help do these things.

I think that some of the change that I've personally seen just being in the philosophic area and going from just little hands-on things to a much larger sustainability type of things. I think people are just growing.

Ted: Anuar, hey, we're a corporation, we gave you a job, be happy with the job. Why would employees be involved and why has that changed?

Ted: Well, I think there's a couple of things to it. One is, and this has always been a mantra here at the foundation too, that we have a strong sense that we can't just be check riders but ultimately the money can only go so far. As a corporation, as a bank, we have a huge, huge asset in the people that work with us. We've always tried to leverage our employees to take our impact farther.

Understanding that the money can only take you so far that really we can leverage the expertise of our employees in different areas to really drive our mission forward. That is on our end. I think on the end of the employee, I'll just echo Ulrika's response, I think there's a sense of community engagement that is just increasing in today's workforce that we certainly see it.

We carry out our global community day every year where we invite every employee in the company to volunteer. This year alone we had over 85,000 employees volunteer in a single day and we see that number grow year over year. I think it is because there is a sense of wanting to belong to your communities, wanting to see change in those communities and not just clocking in and out.

Ted: In looking into the future, the IGS of course this year has been mentioned how to focus on the sustainable development goals. In this era where there is more, as you said, awareness of your surroundings, interest in corporations, being a part of the solution and not just seeking to make a profit. Does all of this combine to change recruitment of employees, retention of employees? Is there a rightful role of philanthropy in drawing the best to a corporation?

Ulrika: I'll answer that. I would say it does. We have already seen that the employees that we're bringing on, they're very interested in being able to help the community and be able to grow areas. They're very focused on wanting to have that as part of their day-to-day work life. It's one of those things that makes me feel good that it is becoming more a part of what is expected when you get a job and that that is part of what they do.

Anuar: Yes, I think you hit it right on the nail. Increasingly you hear from people as they're looking to where they want to work, they want to see a company that's engaged in the community that's engaged with the community for which citizenship is a key focus. Grantmaking has a huge role to play in that. I think when you talk about the business case for grantmaking, that's a huge drawing element. It's the fact that people are increasingly looking for companies that are citizens of their environment that work to improve their communities, that are engaged with their employees and so grantmaking has a huge role to play in that.

Ulrika: Exactly.

Ted: This notion that you're raising of citizenship both at the employee level and at the corporate level, talk to me a little bit more about that and how you see philanthropy having a role in that.

Anuar: I think when talking about citizenship, at least for us, it's really that concept of a company being a citizen of its community, really working to improve the places where we have a business footprint and help those communities. I think when you think about grantmaking and the role it has to play, it's as I mentioned, really engaging the company, the company's efforts, working to instill that mission, the mission of the foundation into the work of the employees, the work of the company.

I think ultimately, the grantmaking has to drive it but in order for it to have a real impact and be scalable, it has to be part of the core of the company and employees want to see that certainly.

Ted: Speaking as someone who has been a delegate to the International Grantmaking Symposium, if you were speaking to someone, to your colleagues, what would you say the experience was like? Having been there, how would you describe your experience of attending the IGS? Ulrika?

Ulrika: That's a great question. I was thoroughly impressed. It was very well thought out. It had a large variety of topics that we covered and people that came and talked to us everywhere and everything from not just people from CAF America but there were UN employees, there were philanthropists, there were lawyers, there were people from non-profit organizations. It was just so detailed but also very broad at the same time that we were able to just be able to interact with each other and really learn what is going on in the area of giving in non-profit organizations.

I really enjoyed being able to do some of the activities that you had set out for us. Also being able to interact with people from different corporations, non-profit organizations, the private sector. I really felt like there was a lot networking and being able to learn from each other.

Ted: That's great. Anuar?

Anuar: I'd describe it as an experience of learning. Learning not just from the great presenters that were there but also from the other delegates. As I mentioned, you really provided a space in which you could talk to other people about the work that they're doing and how they're conducting it, learning from those various practices so it was a space for learning.

I think it was a space for collaboration along with that ability to talk to other delegates, to learn from them and about them. I think ultimately also a great space for thinking as you mentioned earlier in the conversation. Having the ability to step away for a few days and close yourself from the rest of what's happening and then really take some time to spend a few days thinking about the Sustainable Development Goals, thinking about your impact, thinking about your work and how you can continue to improve it and do to make it more impactful.

Ted: Unfortunately we only have 90 seconds left. These shows always go way too fast and the two of you have just been fascinating and terrific so thank you very much. I want to ask as we wrap up each of you to reflect on, as we plan for next year's international grantmaking symposium, in your mind what's the one reason or two if you wish, but we only have a little over a minute left, one or two reasons why someone should make sure that they attend the IGS next year? We'll start off with Anuar.

Anuar: I think if someone were to ask me the reason I would give them is that, and I hate repeating myself but I'll do it again, I'll say it's learning. It really is a great space for learning from the novice grantmaker to the very experienced one. There's plenty to learn from and plenty of people to learn from.

Ted: That's great and Ulrika?

Ulrika: I was going to say the same thing. Learning in- it was a fabulous place to learn in the collaboration.

Ted: Anuar Juraidini and Ulrika Friesen, thank you for helping us recap the 2016 International Grantmaking Symposium held at the United Nations in New York City. Take care. Thank you.

Anuar: Thank you.

Ulrika: Thank you so much.

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