



THE KENYA PHILANTHROPY FORUM

Report on the First Convening

Sarova Panafric Hotel

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EXECUTIVE SUMMARY

Representatives of 30 Philanthropic Institutions in Kenya, including Foundations and Trusts met on 25th March 2015 at the Sarova Panafric Hotel for a meeting to map out, discuss and set the agenda for a mechanism of having a national philanthropy forum.

The purpose of the convening was to;

- Making a collectively owned case for the sector to work as “one-voice” for philanthropy in the county and determine what focus and structure such a forum could take.
- Exploring philanthropic collaborations internally and with all development stakeholders.
- Broaden understanding of the context of the development sector globally and in Kenya including the imminent transition from MDGs to the Post-2015 Sustainable Development Goals (SDGs).

The convening attracted participants from corporates, private and family Foundations and Trusts. Presentations focused on the landscape of the Kenyan philanthropic sector, provided an understanding of the global development agenda and its link to the national development priorities particularly on the MDGs, SDGs and the Vision 2030. The breadth and depth of the sector and the diversity of interactions was appreciated by all present.

From the robust deliberations the following recommendations emerged:

- A Kenya philanthropy forum is established with a focus on; building a common voice among the multi stakeholders, enhancing an enabling environment, and improving synergies with national and county development.
- The forum will facilitate the coordination of actors in the philanthropy sector to interact, engage and share with peers, government and other stakeholders more effectively.
- A clear corporate identity of the Kenya philanthropy sector should be developed through the forum. There is need for the sector to invest in developing more clarity of the philanthropy language including defining local philanthropy and its operational terms.
- The leadership of the forum would be voluntary and inclusive of the different forms of philanthropy. There will be thematic groups established to take into account the diverse interest of the philanthropy institutions and participants encouraged to take up leadership in the thematic groups.
- The Forum should support the development of relevant and reliable data to inform the sector’s interventions.
- Collaboration of the philanthropy sector with Government is a key element that the forum should take up and enhance.
- There is need to assist the communities to be sustainable without creating over reliance on external support.

A planning team was established to conceptualize the forum and advice on the establishment of its structures moving forward.

1. INTRODUCTION

1.1. Background Information on the need for a Forum

Philanthropy is increasingly getting recognized for its role in the development space. This is through its significant contributions over the decades, and its complementary set of new actors, innovative approaches and types of flexible funding. Philanthropy actors therefore may need to consider taking deliberate steps towards strengthening their development assistance frameworks, working with governments and influencing the space in which they operate¹.

In the Kenyan context, philanthropy has grown tremendously, thanks to the long history of giving among Kenyans and the increase in the diverse philanthropic institutions and practices. The shift in the structure of local giving has been characterised by several trends such as a steady rise in strong and innovative institutionalized forms of giving with a keen interest in long term impact intervention as opposed to charity. These institutions include corporate, individual, family and other private foundations.

“Philanthropic institutions have begun to take into account their contribution in development assistance to the global agenda and their impact in the growth of the development sector.”

There have been ongoing efforts to streamline the efforts of the philanthropic institutions and recognizing them as key actors in development. This has seen an increase in interactions among groups interested in philanthropy, leading to heightened dialogue and consolidated efforts to focus on promoting philanthropy, cooperation and accountability. These dialogue forums have had a focus on the quest for an enabling legislative, tax and policy environment for philanthropy; engaging government, international organizations and other regional philanthropy support groups in advocacy, research and public awareness. This evolution has come with an increased demand for an organized approach to philanthropy where actors have an opportunity to interact, share, engage and coordinate with peers, communities and other stakeholders. The East African Association of Grantmakers (EAAG) has been a key regional structure in supporting philanthropy in East Africa. With growth in Kenya, the need to better coordinate information sharing and learning has arisen and exposed the current gap.

It is on this basis that the establishment of a Kenya Philanthropy Forum has been proposed. It is envisioned that the Forum will organically increase and build the constituency of the philanthropic sector, and grow philanthropy to be recognised as a credible agent of delivering national development. EAAG in partnership with KCDF, the Aga Khan Foundation (AKF) and the National Coordinator of the Partnership Platform for Philanthropy came together to initiate the formation of the Kenya Philanthropy Forum.

¹ OECD netFWD'S article series, "PHILANTHROPY AND OFFICIAL DEVELOPMENT ASSISTANCE: A CLASH OF CIVILISATIONS?" By Michael Green www.oecd.org/site/netfwd

1.2. About the First convening on the Kenya Philanthropy Forum

This report is a highlight of the first convening for the proposed Forum. The convening sought to bring together interested philanthropic institutions to set the agenda and map out the mechanism of having an inclusive national forum.

“Philanthropy has made significant contribution to economic development – and there is growing potential”

The key convening objectives included:

- Making a collectively owned case for the sector to work as “one-voice” for philanthropy in the country and determine what focus and structure such a forum could take.
- Exploring philanthropic collaborations internally and with all development stakeholders.
- Broaden understanding of the context of the development sector globally and in Kenya including the imminent transition from MDGs to the Post-2015 Sustainable

Development Goals (SDGs).

From the convening the following issues were identified for action:

- It was agreed that a Kenya philanthropy forum be established.
- It was recognized that the strategic directions and value add of the forum should be clearly defined to strengthen the participation of philanthropy within the national development frameworks.
- A planning team is established to conceptualize the forum, support the establishment of its structures and prioritize ongoing issues for attention. Members were further invited to take leadership in organizing events and themes of interest in a coordinated manner to ensure a collective voice.

2. FORUM CONTENT

2.1. Opening session

Janet Mawiyoo, CEO – KCDF shared the opening remarks. She emphasized on the need for philanthropy to work together, synergize and co-ordinate more efficiently and effectively. This would enable the sector to jointly advocate for policy issues, respond to emerging concerns in the operating environment as well as establish a platform for peer learning. Participants were further encouraged to engage in shaping and owning the process. Participants had an opportunity to introduce themselves and share their expectations on the convening as summarized below:

- Contribute to a collective movement for philanthropy
- Establish a coordinated mechanism of operation in the philanthropy sector
- Have a collective voice to speak to the national agenda
- Learn more about the philanthropy sector
- Share, learn from each other and explore potential collaborations
- Engage foundations in the global Sustainable Development Goals (SDGs) discourse
- Understand scope and magnitude of the philanthropy sector in Kenya
- Understand the mainstream development process and how philanthropy fits in.

2.2. Landscape of the philanthropy sector in Kenya – Magnitude, Scope and Growth Presented by Nicanor Sabula – CEO, EAAG

The session sought to share on the growth of philanthropy in Kenya, looking at the past decades, its evolution and the present opportunities and gaps. It was noted that the global arena has had an increased focus on the role of philanthropy which has necessitated the building of stronger platforms for engagement. This has seen the growth of the sector into strong movements that collaborate nationally, regionally and globally as demonstrated by platforms such as the East African Association of Grantmakers (EAAG), Africa Grantmakers Network (AGN) and Worldwide Initiatives for Grantmakers Support (WINGS).

On the scope of the philanthropy sector, it was noted that there is a mix in the categories of Foundations and Trusts; with some being recognized as purely grant making organisations, others as implementers, while there are those that have both roles. The three common legal regimes that Foundations and Trusts exist include Trust and Trustees Act, Companies Limited by Guarantee and Non-Governmental Organisations Act.

The economic contribution of the not for profit sector through total direct contributions was at Kenya shillings 100 billion from a survey conducted by EAAG with a sample of 55 organisations². The survey on giving focused on the sources of funding in 2013 including amounts received (70% of which are amounts from international sources), major institutional recipients, and sectors that predominantly benefit from the resources by Foundations and Trusts including education, emergency relief, health, environment among others. In conclusion, the presenter highlighted some challenges the sector is encountering; including lack of an enabling environment, inadequate tax incentives to catalyse tax breaks, weak link with the Government, inadequate learning and sharing platforms and Foundations and Trusts operating in silos.

2.3. Understanding the global development agenda, the link to national development priorities

Presented by Arif Neky, National Coordinator, Philanthropy Partnership Platform - UNDP Kenya; Nicholas Chokera - UNDP Kenya and Michael Mwangi, Ministry of Devolution and Planning

This session shared with participants an overview of the current global and national development priorities - looking at the Sustainable Development Goals (SDGs, the Vision 2030 and the second Mid Term Plan (MTP II), and on possible collaboration and multi stakeholder engagement in the development agenda. Arif Neky shared on the Philanthropy partnership platform. He highlighted it as a resource that would enable foundations to better engage in global processes and further help government and the UN system find synergies with foundations to have greater impact to the communities. The initiative that is being run in partnership with Rockefeller Philanthropy Advisors, Foundation Centre, Conrad Hilton Foundation, Ford

² Based on the 2014 Giving Survey conducted by the East Africa Association of Grant-makers (EAAG)

Foundation and MasterCard foundation was launched at the 69th session of the UN General Assembly. Kenya is the first pilot country for the collaborative initiative that aims at helping foundations have a voice in the post-2015 development agenda, playing a more active role in both planning discussions and the implementation. An advisory body has been established between Government, the UN Agencies and Civil Society towards the SDGs under the United Nations Development Assistance Framework (UNDAF).

Nicholas Chokera, an Economist with the UNDP presented on the Government's engagement in the SDG process. It was noted that the MDG outcome is clearly outlined in the Vision 2030 that stipulates "the quality of life for all Kenyans in a clean and secure environment by 2030". He gave a highlight of the Government's engagement on the Millennium Development Goals (MDGs). Since 2000 and in the period, the Government has been able to achieve universal primary education particularly on enrolment, gender equality in women participation, HIV and Environment. However, there have been areas of concern including maternal and child mortality that have not been addressed effectively. In recent years, there are various interventions that have been initiated to respond to this, such as Most at Risk Populations (MARPs) and beyond Zero Campaign.

In line with the SDGs, thematic consultations are ongoing. A country paper has developed from the County to National levels. The focus areas identified in the country paper are; Food and Nutrition, Security, Infrastructure, Energy, Security, Manufacturing and Trading, Education and Health, Capital Markets, Big Data³ (high quality and reliable). The cross cutting issues include Youth, Environmental sustainability, National Values and Governance and Devolution, Public Private Partnerships, Skills development and enhancement. In conclusion, Nicholas recommended that the identification and sequencing of program interventions ought to be moving forward into the SDGs.

"The Kenya County position on the SDGs prioritizes Health, Environment including Food Security and Youth as key areas for intervention"

Michael Mwangi of the Ministry of Devolution and Planning further reinforced the presentations, sharing that the best way forward on engagement would be to:

- Continue the conversation at the County level and support counties in aligning their plans to SDGs and continued tracking of the MDGs.
- Develop a module where institutions of learning can be capacity built on the same starting with the Kenya School of Government, having counties.

2.4. Practicality on moving the Kenya philanthropy sector forward – Janet Mawiyoo, KCDF

The session, sought consensus on the need for a forum and how best it will be operationalized.

2.4.1. The need for a Forum

Participants validated this need and acknowledged:

- Their interests in an active philanthropy platform.
- Diversity and interests within the network should be consolidated with the ongoing conversations.

³ This was noted to be a big challenge for the country because even the National Bureau of Statistics does not have current data

- Strengthening of national discussions and policy advocacy for an enabling environment is crucial for the Forum.
- Government's ongoing efforts in engaging corporate philanthropy groups; therefore reinforcing the importance of having a collective voice for similar engagement.
- Importance of sharing and learning on the best practices.
- Knowledge gaps on philanthropy exist and they have had implications on the sector's recognition.

2.4.2. Objectives of the Forum

- Map and define the identity of philanthropy actors in Kenya.
- Provide a sharing and learning platform.
- Foster collaborations among philanthropy actors, between Philanthropy government & other development stakeholders.
- Form a collective and recognized voice to influence public policy at the national level.
- Seek to enhance a favourable environment for growth and impact of philanthropy in Kenya
- Generate, consolidate and share data on Philanthropy in Kenya for greater influence and impact of the sector.
- Consolidate and coordinate different philanthropy networks in Kenya.

2.4.3. Structure for the Forum

It was proposed that:

- The forum will leverage on existing convening structure such as the East Africa Association of Grantmakers to establish the Kenyan chapter while allowing for autonomy to sub-set networks that reflects the different forms and interests of foundations and trusts.
- The forum will act as an over-arching platform that blends the common issues of the stakeholders and allows for external consultations with other actors such as Government and Private Sector.
- The forum will establish its identity, and participants will consider the different forms of giving; multilevel governance structures; African philanthropy (its narrative, concept of giving and terminologies) in defining its identity.
- The name of the platform shall be inclusive enough to identify with the forms and context of philanthropy locally. (Proposed names included National Philanthropy Forum, Kenya Philanthropy Forum, Kenya Foundations and Trusts Platform)
- The forum hosts national and thematic conversations to accommodate different interests and meet diverse objectives. Thus the membership will have different sub-sets based on interests and the leaders of these sub-sets will form the planning group. This allows for an inclusive leadership structure at the broader level and thematic level.

2.4.4. Eligibility to the Forum

It was proposed that membership should be based on:

- Institutionalized philanthropy structures, registered under the legal regimes of Trusts and Foundations registered as perpetual trust or companies limited by guarantee be considered;
- Philanthropy forms to be taken into consideration e.g. Family, corporate, faith-based, individual, private and community foundations

- High Net Worth Individuals interested in these issues or considering structured philanthropy are welcome to join the forum

2.4.5. Leadership of the Forum

An inclusive leadership committee representing the different forms of philanthropy and thematic areas should be put in place. It is anticipated that the committee will act as a *Think tank* and participate voluntarily. The Think tank should present the priority areas of focus in the next meeting.

2.4.6. Forum Resources

It was proposed that there is need to foster local ownership with participants contributing towards making the forum a successful initiative e.g. hosting of meetings.

2.5. Way Forward

It was proposed that a planning team be constituted to further conceptualize and actualize the Forum.

2.6. Other recommendations from the Forum Outcomes

1. *There is a weak link between philanthropic institutions interventions and response communities thus unable to effectively respond to community needs:* Philanthropic institutions should contextualize their interventions in line with the community needs. Within thematic focus there is need to interrogate the value add of foundations' interventions towards building a sector. For instance, huge grants go towards education; however focus is more on scholarships as opposed to enterprise development which is now the demand in skills development market.
2. *Appreciation of the African narrative on local giving is critical, and building a linkage to the Kenyan context of philanthropy is important in strengthening the common understanding of philanthropy among practitioners.* Foundations and Trusts should further interrogate their program design and implementation to be aligned to the Vision 2030 and Government sector wide plans. Through this, philanthropy will effectively respond to the changing context.
3. *There exists a gap on the different interpretations of the terminologies used within the philanthropy sector:* Levelling understanding within and without the philanthropy sector on terminologies like philanthropy and grant making is crucial in building oneness on philanthropy.
4. *On the legal framework, the sector should lobby for a common registration framework that defines Foundations and Trusts.* This provides clarity on the philanthropy sector and is a critical component of working with Government.
5. *Inadequate data on the sector has an impact on the contribution of the sector on national development:* The need for accurate data and relevant information on the philanthropy sector is urgently required that reflects the current environment – current studies should be undertaken. There should be quantification done for non-monetary grants received in philanthropy in terms of mentorship and

“The growth of philanthropy should not only be measured by the grants given but by the change made.”

volunteerism. Increased information sharing is also relevant towards responding to the inadequate data. Opportunities further lie herein, where the data from the philanthropy sector could support the existing gaps on the limited data provided on the national and global development goals.

6. *Evaluation of the value-add of the philanthropy sector is critical in enhancing the sector's engagement in national development:* The sector should strive for instance to:
 - Empower as opposed to absolute growth;
 - Focus on investing and breaching the gaps in poverty;
 - Incubate ideas and innovations for sustained development.
7. *Strategic positioning of the philanthropy sector:* The sector is at a point of great opportunities in its growth particularly as the world transits from Millennium Development Goals (MDGs) to Sustainable Development Goals (SDGs) since there has been a global interest in the role and contributions of the philanthropy sector. At a national level the opportunity lies in linking with government and breaking the silos among philanthropic institutions to achieve greater impact.

3. CONCLUSION

Maurice Makoloo, representative for the Ford Foundation in Eastern Africa shared a vote of thanks. He challenged participants to be part of the solutions to the increasing challenges that the country was facing. He stated that Foundations and Trusts need to change their strategies and craft actions to meet the changing times whilst breaking the silos that have been created in the sector. One of the major challenges to the MDGs not being fully achieved has been the lack of proper coordination and effective partnerships. He emphasised on the need to work with Government in order to engage and understand the SDGs, Vision 2030 and the County Governments' development vision. On the other hand, the Government must see the philanthropic sector as an ally that can add value with contributions being made in good faith – this would make the philanthropy Forum achievable. He reiterated the support of the Ford Foundation in participation and engagement of the process.

ANNEX: LIST OF PARTICIPANTS

Name	Organization
1. Alexander Ndolo	Kilele Foundation
2. Arif Neky	UNDP
3. Bernadette Karari	The Jomo Kenyatta Foundation
4. Bill Ayieko	Safaricom and M-Pesa Foundation
5. Caleb Opon	Social Value Pillar
6. Carmichael Nduri	The Fred Hollows Foundation
7. Catherine Mbutu	EAAG
8. Charles Njoroge	Edumed Trust
9. Clement Ng'ang'a	Allavida Kenya
10. Daniel Masawi	GEF-Kenya
11. Duncan Chando	Mwelu Foundation
12. Edwin Kiama	Inuka Kenya ni Sisi Ltd
13. Elishiba Msengeti	EGF
14. Fred Lesakale	Asante Africa Foundation
15. Hirji Shah	Chandaria Foundation
16. Ivy Mwai	MasterCard Foundation
17. Jane Weru	Akiba Mashinani Trust
18. Janet Mawiyoo	KCDF
19. Julius Chokerah	UNDP
20. Kevin Doyle	Independent Consultant
21. Kevin Moorhead	AKF
22. Koffi Assouan	MasterCard Foundation
23. Kristi Maasjo	AKF
24. Maurice Makoloo	Ford Foundation
25. Mike Njeru	Kengen Foundation
26. Minayo Sagala	Acumen Fund Inc.
27. Newton Kamunge	Bridge
28. Nicanor Sabula	EAAG
29. Nicholas Ribai	UNDP
30. Phillip Gathungu	The Family Group Foundation
31. Sara Njuru	Hilde Back Education Fund
32. Shem Ochola	AKF
33. Sophy Njoroge	Ambassador Francis K. Muthaura Foundation
34. Stephen Gichuki	Cooperative Bank Foundation
35. Susan Odongo	KCDF
36. Timothy Kilimo	Uraia Trust
37. Wairu Kinyori	KCDF
38. Wariko Waita	KRCS



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