



Outcome Report

Excellence in Philanthropy Roundtable

Event Date: 16 October 2019

Event Location: Nafisa Shams, Jeddah, Saudi Arabia



Excellence in Philanthropy Roundtable Overview

In contemporary discourse, funding within the philanthropic sector in the Gulf Region gravitates towards causes that are well publicised in current affairs; this often means that funding is concentrated on certain causes, while other areas that require funding are overlooked. By building an ecosystem that promotes transparency and traceability, data around causes and other areas, that are underfunded, become readily available. However, it is up to the donor community to utilise this valuable data to drive their grant-making decision making process.

Strategic philanthropy, which is informed by facts, rigorous evaluation and heightened accountability, can help donors set clear goals, outcomes and performance indicators to ensure the success of their philanthropic endeavours. By shifting to a more strategic model for philanthropy, one that promotes transparency and traceability, the odds of achieving success in scalable impact are increased. Further, these odds are multiplied when appropriate reporting, monitoring and evaluation mechanisms are in place.

Held in collaboration with Nafisa Shams, a Community Jameel initiative, this roundtable provided an open platform for participants to gain insights on the tangible steps that can be taken to shift focus onto strategic philanthropy across the region. The roundtable aimed to establish collaborative efforts and collective impact to achieve scalable results in the Gulf Region by promoting meaningful social impact through reporting, traceability and knowledge sharing.

Speakers:



May Taibah

Senior General Manager

Nafisa Shams



Yasmine Omari

Executive Director

Pearl Initiative



Elham Al Sanie

Director of Capacity

Building Programme

King Khalid Foundation



Abdurahman Al Sum

Director, Corporate Sustainability

Ma'aden



Tarik Ismail

Executive Director - Corporate Affairs, Sustainability & Board Secretary

Savola Group



Hala Y. Salah

Vice President Group Affairs

Zahid Group



Rana Zumai

Executive Manager - Corporate Communications

Nesma Holding

Introduction and Welcome Remarks

May Taibah welcomed the audience to Nafisa Shams, highlighting the role the academy has played in training women in the workforce and supporting entrepreneurship. She then introduced the ongoing collaboration between Nafisa Shams and the Pearl Initiative and welcomed Yasmine Omari to the stage.

Yasmine Omari introduced the [Governance in Philanthropy](#) programme and its mission to support corporate and institutional donors striving to be more strategic and impactful in their giving. As part of the programme, the Pearl Initiative promotes the implementation of improved governance standards in the Gulf Region's philanthropic ecosystem and aims to contribute to maximising the impact of giving through the development of resources and practical knowledge sharing.

To further advance the mission of the programme, the Gulf Business Philanthropy Circle was launched earlier this year to share challenges, best practices and deliver recommendations to corporate and institutional donors to drive strategic philanthropy forward.

Yasmine highlighted that the Pearl Initiative had conducted [research](#) where significant data on the governance expectations of institutional donors pointed at the three (3) main challenges in the sector being transparency, reporting and impact. To this end, she noted that the urgency to address the topic of how to be more strategic in philanthropy to enhance both transparency and maximise impact in the wider sector.





Keynote Speech

Overview of the Philanthropic Landscape in the Gulf Region

Elham Al Sanie opened her keynote speech by reflecting on the development of the non-profit sector across the Gulf Region, with a particular focus on Saudi Arabia. The following summarises the key points Elham Al Sanie reflected on:

- The important role of the non-profit sector, including both implementing organisations and foundations, is becoming increasingly valuable to global economies, often times creating pivotal links between the private and public sectors through the establishment of universities, hospitals, research centres, etc.
- Well-governed philanthropic institutions have the potential to play an even larger and more influential role in societies.
- Despite efforts made by private foundations and government actors, there remains a few challenges facing the non-profit sector. These need to be addressed in order to achieve Saudi Vision 2030 stipulating that the sector's contribution to national GDP needs to rise from 0.3% to 5%.

Key challenges include:

- Lack of experience, knowledge and skill due to newly established non-profit organisations and foundations,
- Low employee retention rates,
- Lack of transparency and accountability in the sector,
- Minimal engagement of Board Members within organisations,
- Poor implementation of impact assessment mechanisms, and
- Absenteeism of reliable data about funding and causes.
- These challenges have led to the development of King Khalid Foundation's (KKF) capacity building programme, which was launched in 2008 and provided training to over 1700 individuals working in the non-profit sector.
- Trends and gaps in Saudi Arabia's non-profit sectors were identified in KKF's year-long research.

Key findings include:

- The number of non-profit organisations operating in Saudi Arabia is low, in comparison to neighbouring Arab countries. For example, Saudi Arabia has 1,100 non-profit organisations and foundations, while other countries of similar populations have over five times that number.
- The non-profit sector in Saudi Arabia is exceptionally open to innovation and new ideas, rating high on openness and tolerance.
- Legislation in the non-profit sector needs further development.

The key recommendations summarised in the report include:

- Setting clear classifications for the different types of organisations operating in the sector,
- Establishing a centre dedicated to the capacity building of non-profit organisations, and
- Launching targeted academic programmes tailored to the non-profit sector.
- These recommendations are already being addressed, seeing that for the first time, the development of the non-profit sector was prioritised in Saudi Arabia's national agenda.
- Saudi Arabia will be hosting the [C20](#) in 2020, allowing for local organisations to learn from regional and international experts.



Panel Discussions

Panel 1: Building an Ecosystem where Generosity Meets Strategy

Yasmine Omari facilitated an interactive discussion on the various philanthropic strategies implemented by corporate and family business donors across the Gulf Region. The panellists discussed their views on best practices implemented by their respective organisations.

The key outcomes of this session are summarised below:

- Philanthropy has always been a part of the region's heritage and is deeply rooted in the religion and culture. However, it is often conducted as individual charity and not strategic philanthropy aimed at sustainable social change.
 - For instance, if corporate sponsorships are not made as part of strategic sustainability and social investment programmes adopted by the donor company, then they are most likely not sustainable and will not necessarily generate their intended impact for all the stakeholders involved.
 - The most pressing issues facing Saudi society at the moment are health, education and environmental issues. In this case, companies should set programmes that address these issues based on their know-how and expertise.
- Despite the challenges facing the non-profit sector, civil society organisations (CSOs) are increasingly adjusting their frameworks to promote greater sustainability and impact in their specialised field of work.
- In terms of regulations, the Saudi government has taken the lead in drafting and enacting new policies and regulations for the non-profit sector.

“Providing corporate sponsorships that are not necessarily aligned with the overarching corporate strategy for sustainability and social investment is PR and certainly not CSR.”

Tarik Ismail

- The private sector is taking initiative to set more strategic social investment programmes and implement better governance practices in philanthropy. However, the panellists noted a few recommendations that companies should consider when planning strategic social investment and sustainability programmes, these include:
 - Adhering to a set corporate strategy when making funding decisions,
 - Researching issues and causes prior to making decisions,
 - Choosing causes that are relevant to the business,
 - Partnering with non-profit organisations that are experts in the fields and areas a company would like to support,
 - Simplifying the language to facilitate conversations between the private and non-profit sectors,
 - Avoiding risks associated with partnerships by setting clear expectations, roles and responsibilities, and
 - Engaging relevant stakeholders at the right time.

The panellists concluded that greater impact could be achieved by building partnerships not only with the private sector but also among companies that have similar sustainability and social investment strategies.

“The private sector is well-versed in setting strategies to achieve goals. If the non-profit sector applies the same mechanisms for their work, then all intended outcomes will be achieved and the only way for this to happen is through effective partnerships.”

Hala Y. Salah



Panel 2: Strategies for Scalable Impact

Following on from the morning discussion on setting strategies for social investment and sustainability programmes, the second panel moderated by Yasmine Omari addressed the scalability and impact of programmes.

- Scalability is defined as the capability of systems or mechanisms to cope and perform well under an increased or expanding workload or scope. A system that scales well will be able to maintain or even increase its level of performance or efficiency even as it is tested by larger operational demands.¹
- In philanthropy, scalable impact is attained by asking “How can we get 100x the impact with minor changes to size and strategies of organisations?”
- It was noted that transparency is instrumental to the scalability of philanthropic programmes and initiatives. 71% of the audience believed that the main obstacle to the scalability of the programmes implemented in their organisations is the lack of data on where philanthropic capital is being invested.
- Reflecting on their personal experiences, the panellists stressed the importance of taking risks and being transparent about them, to create a positive social change.

To overcome the challenges of transparency, the panellists urge organisations to:

- Stay focused and strategic,
- Have the courage to talk about their failures (“throw yourself out there”),
- Be humble and open in dealing with third parties (mainly the community) to encourage greater transparency between stakeholders, and
- Adopt a human-centric approach.

“In order to scale up impact, you need to reach a critical mass. The only way to reach the critical mass is through the multiplier effect.”

Abdurahman Al Sum

- The critical mass is the community that lead change in societies and the role of the private sector is to empower them.
- The recommendations for organisations seeking to scale up their impact, as outlined by the panellists, include:
 - Engage in strategic partnerships with companies that can add value to your existing initiatives and efforts,
 - Invest in the younger generation, as they are the critical mass of today,
 - Target a change in culture to achieve better results, and
 - Always include a non-profit partner on your projects, ultimately contributing to the empowerment of the sector.

“Private and non-profit partnerships provide avenues for the transfer of knowledge, ultimately leading to more effective organisations delivering greater impact.”

Rana Zumai

¹ <https://www.investopedia.com/terms/s/scalability.asp>

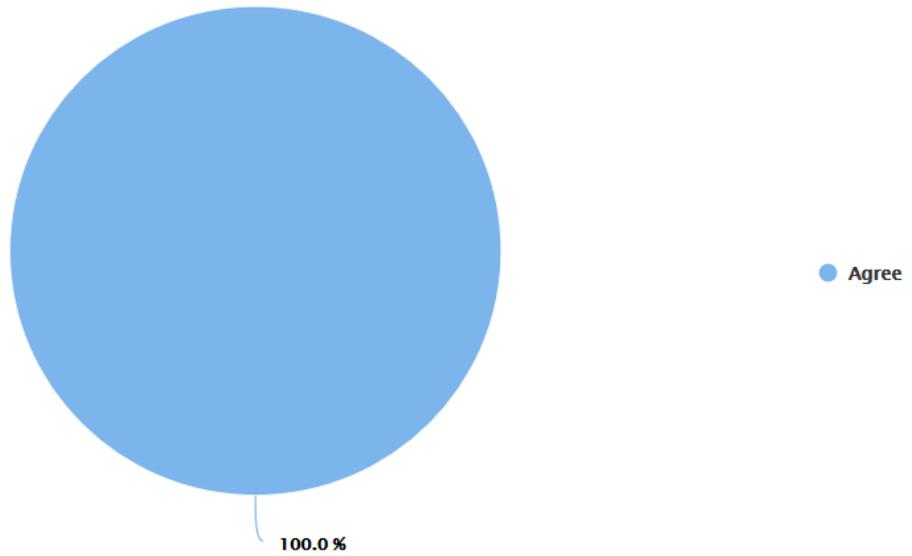


Closing Session

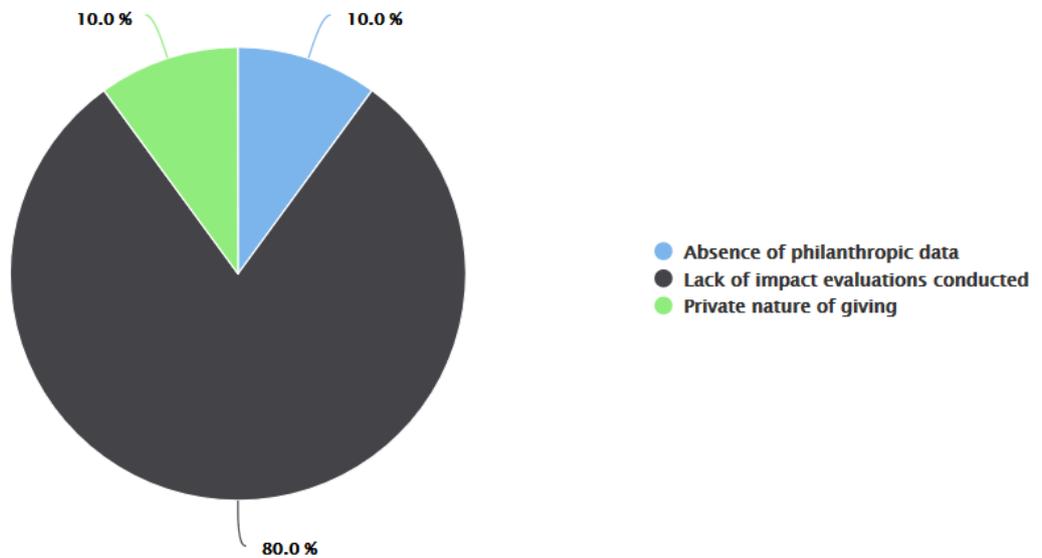
Audience Engagement

Before closing the session, Yasmine Omari engaged with the audience through the Pearl Initiative's live polling application. The charts below summarise the responses from the audience.

Do you agree or disagree with the following statement? Evaluating and reporting on impact leads to greater philanthropic results.

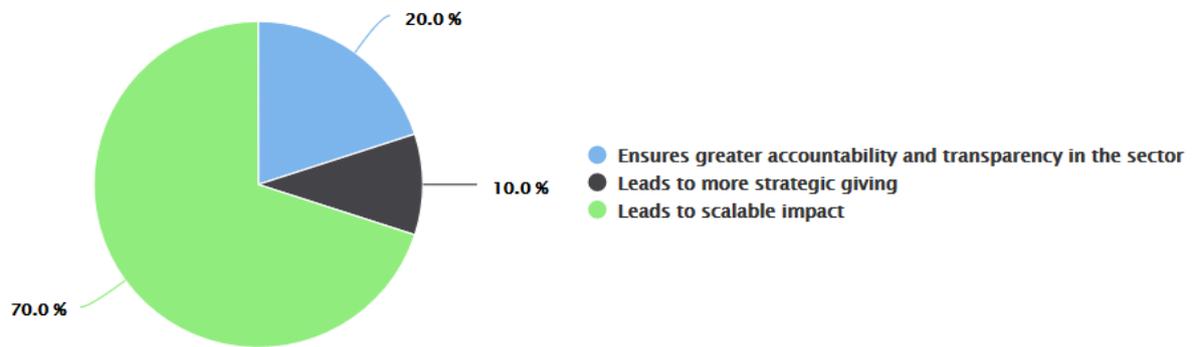


What is the main challenge of strategic philanthropy in the region?

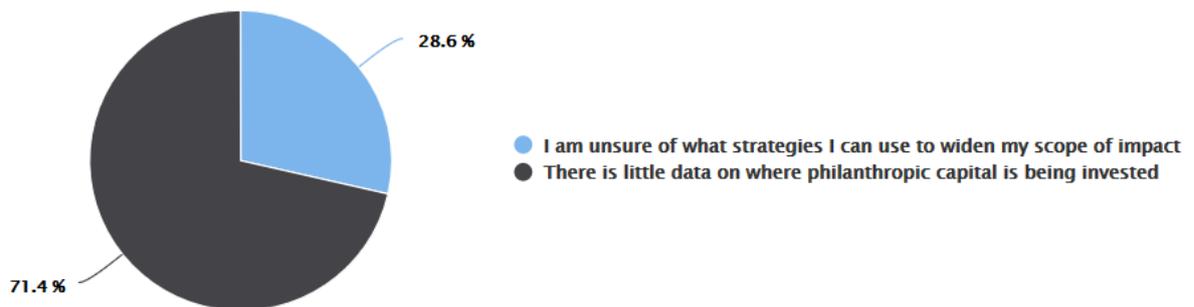




What, in your opinion, is the most important benefit of organisations reporting on impact?



What is the main challenge you have faced in increasing the scalability of your organisation's impact?





Appendix 1

Event Agenda

09:00 – 09:30 Registration

09:30 – 09:40 Welcome

- May Taibah, General Manager, Nafisa Shams
- Yasmine Omari, Executive Director, Pearl Initiative

09:40 – 10:00 Keynote Speech

- Elham Al Sanie, Director of Capacity Building Programme, King Khalid Foundation

10:00 – 11:15 Panel 1: Building an Ecosystem where Generosity Meets Strategy

- In the philanthropic sector, the performance of a non-profit organisation is seldom considered before making a grant. There is a wide tendency to compare philanthropy and business, and this parallel can shift focus from strategic and thoughtful giving. This session explored how donors in the Gulf Region can take tangible steps towards making grants that are both impactful and driven by data.
 - Tarik Ismail, Executive Director - Corporate Affairs, Sustainability & Board Secretary, Savola Group
 - Hala Y. Salah, Vice President Group Affairs, Zahid Group
 - Moderated by Yasmine Omari, Executive Director, Pearl Initiative

11:15 – 12:30 Networking / Prayer Break

12:30 – 13:45 Panel 2: Strategies for Scalable Impact

One of the greatest challenges of the sector is evaluating and reporting on impact, and the first step to ensuring effective impact evaluation is strategic planning. This session discussed how social investment programmes can be strategically structured to enable effective impact evaluation.

- Abdurahman Al Sum, Director, Corporate Sustainability, Saudi Arabian Mining Company (Ma'aden)
- Rana Zumai, Executive Manager - Corporate Communications, Nesma Holding
- Moderated by Yasmine Omari, Executive Director, Pearl Initiative

Key Information

Number of Attendees: 24 attendees

Profile of Attendees: Heads of Family Businesses and Family Offices and Directors managing philanthropic capital

Attendee Feedback:

Quality of registration & administration – **100% satisfaction rate**

Quality of networking experience – **80% satisfaction rate**

Overall quality of event – **76% satisfaction rate**



Appendix 2

Panellists

May Taibah, Senior General Manager, Nafisa Shams

A professional executive with more than 23 years of diversified working experience, including 13 years of experience in establishing and managing emerging businesses, and 10 years of experience in the area of education, May is the Senior General Manager of Nafisa Shams, a leading entity of Community Jameel in the areas of training and production.

She managed and participated in many projects including establishing business strategies, creating new profit centres and new business lines, and developing existing ones, in addition to designing programmes in the areas of capacity building and entrepreneurship.

Abdurahman Al Sum, Director, Corporate Responsibility, Ma'aden

Abdurahman Al Sum is a specialised strategist in sustainability with an engineering and industrial background. He worked in different national and international companies of different sizes and fields. Abdurahman participated in developing strategies and leading strategic initiatives for corporates, grant-making foundations, and charitable organisations.

Currently, Abdurahman works in the mining sector with a mission to go beyond environmental compliance, maintain the social license to grow and embed the wider stakeholder approach. He is also the author of a book "Sustainability Paradox, The Way Out" and the main contributor to MENASG.org website about Sustainable Growth in MENA Region.

Tarik Ismail, Executive Director - Corporate Affairs, Sustainability & Board Secretary, Savola Group

Tarik Ismail is one of Savola Group's most aspiring young Saudi Nationals. He first started working with Azizia Panda United, a subsidiary of The Savola Group, where he achieved recognizable successes in the fields of corporate communication and corporate social responsibility. From there, he was assigned to a number of tasks in the corporate affairs department in the headquarters of the Group, until his promotion to Executive Director of Corporate Affairs, Sustainability & Board Secretary.

Hala Y. Salah, Vice President Group Affairs, Zahid Group

Hala Salah was the first Saudi Arabian woman to be nominated by His Majesty King Abdullah Bin Abdul-Aziz to be part of the think tank team that developed the concept of Economic Cities in the Kingdom of Saudi Arabia.

She has twenty-three years of experience in various areas, in the financial, public and private sectors. Over the years, Hala played a major role in attracting foreign investments to Saudi Arabia by contributing to the ease of doing business in the country.

Currently she sits on the Boards of Zahid Travel Group, OCS Arabia and serves as the Vice President of Group Affairs in Zahid Group.

Rana Zumai, Executive Manager - Corporate Communications, Nesma Holding

Rana Abdullah Zamai is the Executive Director of Corporate Communications at Nesma Holding and is the General Manager of Nesma Embroidery Centre. Rana brings with her extensive experience in establishing factories and setting up facilities for women and people with disabilities.

Building on her experiences in the field of business development, she serves as a consultant in the "Business Clinics" at the General Authority for Small and Medium Enterprises in Saudi Arabia ("Monsha'at"). A passionate social activist, Rana sits on the boards of Al Bir Society and Majid Society in Jeddah.



Appendix 3

Pearl Initiative Team

Yasmine Omari, Executive Director



An expert in governance for family firms, Yasmine joined the Pearl Initiative as Head of Programmes, and was appointed as Executive Director in 2019. She has experience in the implementation and operation of governance systems, as well as business performance and risk management capabilities for private companies and family offices. Prior to joining the Pearl Initiative, Yasmine was an Associate Director at Deloitte and supported clients in navigating the business challenges faced by entrepreneurial families in business. Yasmine has a legal background and holds a degree in Law and Arabic from SOAS, University of London.

Lamia Adi, Senior Programme Associate



Before joining the Pearl Initiative, Lamia worked with Pink Tank, the Dubai-based consultancy focusing on research and knowledge-based conferences in the Gulf Region. In her role at the Pearl Initiative, she supports in planning, managing and implementing governance and diversity programmes across the Gulf Region. A graduate of bachelor's degree in Foreign Service from Georgetown's University School of Foreign Service with a minor in Arab and Regional Studies, she is keen on contextualising research and adding tangible value to the region.

Sumaya Nair, Junior Programme Assistant



Having previously worked closely with developmental social enterprises in the UAE, Sumaya is concerned about a wide range of global issues, including conflict zones, humanitarianism and philanthropy. With a degree in International Politics, she is also passionate about corporate governance and the role the private sector has in pushing forward the SDGs. At her role at the Pearl Initiative, she supports in the managing and implementing of the Governance in Philanthropy and Governance in Family Firms programmes in the Gulf Region.