

## Governance in Philanthropy Workshops with 21/64 Outcome Report

January 24 – 25, 2022

21/64 was invited to facilitate two virtual workshops in January 2022 for U/HNW individuals/philanthropic donors in the Gulf region as part of the Pearl Initiative's (PI) current project (Circle) as part of its Governance in Philanthropy programme, in collaboration with Philanthropy Age and with support from the Bill & Melinda Gates Foundation.

The Pearl Initiative's Circle network's efforts have been aimed at continuing to cultivate and strengthen a community of likeminded individuals stepping into leadership roles in their family's philanthropy. The sessions took place over two days and gathered a total of 11 participants across various countries including the United Arab Emirates, Saudi Arabia, Kuwait, and Lebanon.

The programme was spread over two days:

**Day One** was dedicated for individuals who are new to PI's Circle Network and focused on clarifying their philanthropic identity, values, vision and providing a space for participants to connect and learn from their peers.

- Participants enjoyed learning about each other's family stories from the ways that they each shared the people and events that have shaped them to become the funders they are today.
- In general, participants found it enlightening to explore and rediscover the values that motivate their philanthropic decision making.
- Participants selected images that represented the vision they see for their philanthropy using 21/64's Picture Your Legacy Tool (\*This interactive toolkit was shipped in advance to all participating attendees) and unpacked the various resources (Time, Talent, Treasure and Ties) that they can allocate to achieve the change they want to contribute to their philanthropy.
- Participants were energised and inspired by the images that helped provide them with a language to start crafting their philanthropic vision or legacy they want to leave behind. The facilitators demonstrated the difference between a mission and a vision statement and how they can be utilised as a roadmap to help funders achieve the impact that they want to contribute through their philanthropic work.

### Speaker Session: Charity vs. Strategic Philanthropy with Sarah Ojeh

#### Key Takeaways:

- Participants resonated with Sara's philanthropic journey, especially on her emphasis to rely on partnerships and experts on the ground to execute her philanthropic endeavours. She also shared the importance of taking a break, pausing, and re-evaluating philanthropic goals in order for the work to be sustainable.
- Some participants were eager to learn about philanthropic advisors in the region and ways that they can be helpful to further their philanthropic work. Sara recommended a few that she has worked with, and PI's Circle network curated and shared a recommended list of philanthropic consultants with participants following the workshop (With strategic input from Philanthropy Age and the Gates Foundation).

- Some participants valued Sara's global perspective and others appreciated her roots in the Middle East.
- Lastly, the conversation with Sara Ojeh inspired participants to think more strategically about their philanthropy and served as a suitable primer for the session that they experienced on Day 2.

**Day Two** focused on how to allocate resources in alignment with values in both giving and investing. In this day, participants who attended the first day of the programme were joined by the Circle network's next gen members who have taken part in programming that has 21/64 facilitated previously.

- 21/64 facilitators Sharna and Andine shared how the money messages that they each grew up with informed how they allocate their philanthropic resources. After Sharna and Andine modelled the connection between their money messages and their philanthropic decision-making, participants were invited to consider the money messages that they heard growing up from their family and how it informs their giving. Then, they were encouraged to think of a money message that they aspire to live by to further their philanthropy.
- Hearing their peers' different money messages in the breakout room and debrief conversations helped some participants address some of the questions that they raised during the session's ice breaker exercise.

### **Case Studies Featuring Guest Speakers**

Day 2 of the workshop featured two seasoned female philanthropists to speak to the group and share their experiences as donors and leaders in the philanthropic field, Valerie Rockefeller from the US and Elizabeth Tanya Masiyiwa from Zimbabwe and the UK.

### **Mission-Aligned Investing: How to Allocate Our Resources to Accelerate Change featuring Valerie Rockefeller**

#### **Key Takeaways:**

- Participants appreciated Valerie's vulnerability and personal stories on how she allocates her personal and philanthropic funds.
- Participants were inspired by Valerie's personal philanthropic journey on top of the technical expertise she brought to the conversation as an impact investor. As someone that inherited not only a legacy but a prominent family name, Valerie shared her journey of getting comfortable with leveraging her family's name, reputation, and resources – her full self – to champion the issues she funds.
- Participants were inspired by how she's using her voice, relationships, and reputation in addition to grantmaking and investing she's doing to draw attention to the issues of climate change. Participants learned how they could align their values with a broader set of the resources they have to affect change.

### **Walking Our Talk: How to Integrate and Operationalise Our Values with Our Philanthropic Practices Featuring Tanya Masiyiwa**

#### **Key Takeaways:**

- Participants appreciated learning about Tanya's journey as the eldest daughter in her family and helping the family foundation. Her leadership story was inspiring to many.
- Participants resonated with Tanya's challenges and opportunities in her family's efforts to collaborate with government entities and community leaders in her region.
- Participants learned how Tanya and her father leverage the family business to support their philanthropic efforts. They appreciated learning not only the opportunities, but some of the hurdles they faced in trying to implement their mission toward impactful results.

### **Intentional Connections and Pairings**

Participants have expressed that they are looking to connect with a network of likeminded peers, to learn about how others do their philanthropy, think about potential collaborations or how they can apply their peers' strategies or approaches in their own work prior to the workshop. Therefore, for the last segment of the workshops, participants were intentionally matched and placed in three rounds of breakout room pair conversations where they were able to have a one-on-one conversation with three other participants in the virtual room.

After their pair conversations, the closing session invited each person to share their reflections and one takeaway from participating in the workshops.

### **Summary of reflections and takeaways:**

- The group overall shared how they appreciated the balance of facilitation, content, guest speakers and small group or pair discussions. They thanked the organisers of the workshop and are looking forward to continuing to keep in touch.
- PI's Governance in Philanthropy Programme will continue to foster conversations that were seeded at the workshop through the Circle and will help connect participants with each other individually to foster collaboration and network engagement.