

EXTERNAL REVIEW SUMMARY REPORT  
The Other Foundation  
November 2019

**The OTHER REFLECT:  
Five Years of Building a Community Foundation with LGBTIQ people  
in Southern Africa**

*“...we are also a community foundation, which is a particular kind of public foundation (as compared to a private foundation). How we do things must give full expression to being a community foundation if we are to be that authentically.*

*Our policies, systems, attitudes, and practices must give expression to our unique “community” nature”*

[Neville Gabriel]

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We trust that all who participated will read themselves in some form in these pages as we truly appreciate and honour the ideas you shared.

The Review Team take fully responsibility for the analysis reflected in this Report.

## SUMMARY

The Other Foundation is now, in 2019, five years into its lifecycle. The Foundation took a decision to commission an end of strategy External Evaluation which was, by agreement between the consultants and the CEO, changed to an External Review. The purpose of the exercise was to reflect on and analyse what had worked and what had not worked and to use this to shape and inform the strategic direction for the next five years. A key question which we underpinned the Review was “***What are the internal and external factors that may have or could in future, facilitate or hinder the potential of the Other Foundation to achieve the changes it seeks and has already achieved?***”

## BACKGROUND

The Other Foundation was formally established in 2013 when a Trust Deed was signed by the first three trustees. After a new, bigger and more diverse Board of Trustees was in place, a team of five were recruited led by the Chief Executive Officer [CEO]. A five-year strategic plan was collaboratively developed in the same year with activists and allies and a framework which included supporting, deepening, expanding and sustaining the growing LGBTI movement in Southern Africa. From the start, the Foundation has worked at a rapid pace to get grants to individuals, groups and organisations in the LGBTI and related movements, and to themselves implement directly projects and programmes. The Foundation and LGBTI activists forged, over time, various kinds of relationships, each bringing important resources to the table – financial, intellectual, labour and time and experience on the ground to influence change processes.

## THE REVIEW PROCESS

The Review was conducted over a protracted 6month period and initially sought to assess sustainability, relevance and effectiveness in the main. The Review team focused on both internal and external work and organising in an effort to focus the review on factors that help and hinder the implementation of the strategy and its results. Just over 100 people were engaged in focus groups, interviews and meetings and a sample of four countries visited [Lesotho, Malawi, South Africa and Zimbabwe. Stakeholders from grant partner, strategic partner, donor partner, staff and Board of trustees participated.

## THE CONTEXTS

According to SADC, the context in which the Foundation does its work is characterised by hunger, malnutrition, gender inequalities, exploitation, marginalisation, high morbidity and HIV and AIDS. Additionally, from a feminist perspective, patriarchy, heteronormativity, the crises of capitalism, conflict and violence and religious fundamentalisms together with environmental exploitation and the climate crises are key systemic factors that shape the hostilities ordinary people face daily.

## **THE MOVEMENTS**

The movements in southern Africa have been, by some accounts, coming into a new mobilisation. There are ideological, strategic, conceptual and movement cultural differences between these movements. Although there is still much disconnection between movements, growing cross movement work through coalitions and networks exists. In feminist spaces and in LGBTIQ spaces, there is a confluence of newer, emerging and robust forms of activism and movements, connected and disconnected from older more established formations and activisms. There is a growing readiness or provocation, although still in small pockets, to work across generations, geographies, issues and identities.

LGBTI movements have grown rapidly in the last ten years. These organisations have forged a path from invisibility to voice and power and have been increasingly challenging society and the state to meet their demands for their human rights to be respected. There is an ongoing process where many newer and younger activists, groups and organisations are emerging and taking space alongside older activists and formations. LGBTIQ activism is done from varying ideological, conceptual and strategic frames. Whilst some are focused on narrow forms of identity politics, other approaches are “intersectional” and cut across issues and movements. Some of this activism is being done as LGBTIQ-specific organising whilst some of this is unfolding through linked movements such as feminist spaces and the sexual and reproductive health and rights movements. Whilst there are many who are active and leading in these movements who are themselves non-conforming in terms of their sexuality and gender, there is also significant homophobia and transphobia there.

## **THE PROBLEM**

Using a feminist lens, the key issue facing LGBTI people is that they face multiple oppressions from systems of patriarchy and heteronormativity; capitalism; war, conflict and violence; religious fundamentalisms and fascism. These lead to poverty and inequality, deep social exclusion and a lack of recognition of their right to bodily and personal autonomy, freedom and dignity. The problem addressed by the LGBTIQ movement is, in the main, the lack of autonomy and freedom to choose and make decisions for themselves and the sanctions and punishments under patriarchy and capitalism for those who exercise their autonomy in terms of sexuality and gender, amongst others.

## **PROGRAMME REVIEW**

### ***Promising practice***

The Other Foundation is positioned to deepen their practice through a range of promising practices which can be categorised as intellectual work, influence work and solidarity work. Examples of these promising practices are the ways that knowledge production as an African project is foregrounded; the high quality, rigorous formal research conducted; modelling of work to influence and support individuals in the Christian faith and business to integrate inclusion and dignity of LGBTIQ people and the rights of LGBTIQ people in their work; and some features of the grant-making framework which go the extra mile in terms of enabling LGBTIQ people to access and manage grants.

## ***The Strategy***

Whilst the long term impact sought by the Other Foundation through its Strategic Plan [2014-2019] is to *“Increase social inclusion and legal recognition of rights of LGBTI people in southern Africa”*, the medium term goal is to focus on *“more and better quality engagement by LGBTI groups with social institutions, public policy makers and private companies in southern Africa and with international LGBTI advocacy groups”*. The Foundation makes a contribution towards more and better quality engagement of LGBTI people groups with power holders through its work to support the field, deepen the field, expand the field and sustain the field. These four processes form the base and basis of the Programmes of the Foundation.

## ***Support the field***

Support the field saw the establishment of a grants system within the Foundation within the first year of its establishment and the making of the first grants that year – 2014. This sense of urgency in terms of shifting funds to grant partners has been a feature of this work throughout. Over the 5 years, the Other Foundation has allocated over 200 grants and an amount of about 40 000 000 [forty million Rands] to individuals and organisations in all 13 countries of focus. The grant function is highly relevant and has been successful and effective in supporting the establishment of new activist work and organising and has also effected some important work to sustain bigger and older groups that often struggle to raise funds for their core and programme costs. There are a number of persistent bottlenecks related to inconsistent communication and long delays in shifting funds with severe negative consequences for grant partners. The Foundation is aware of these and efforts to address these through grant management software, a Grants register kept and tracked by CEO and other means is underway. Plans to escalate the grant partner support function through solidarity visits and linkages to resources and other groups is on the cards. Grant structure which includes the kind of grants and how they are structured as well as who makes decisions about which kind of grants is a key area requiring attention. This work to address the delays and weaknesses in the grants system is urgent and a priority for the organisation in the first part of 2020.

## ***Deepen the field***

The Other Foundation has produced directly a total of 19 publications based on research across 13 countries and at the regional level. These include: *Canaries in the Coal Mine* in 10 countries; *Silent No Longer*; *When Faith Does Violence*; *Progressive Prudes*; *Pink Rand*; *Malawi Attitudinal Study*; *Get Real*; *Stabatisation*; *Taking a Stand*. The relevance of this function is high and there is significant appreciation by stakeholders from a wide range of categories including grant partners, strategic partners, students, researchers and donors. Those working on this function have a strong analysis of what is working and what isn't and a clear strategy for strengthening this work even further. A key recommendation is to further strengthen this work through producing publications in partnership with grant partners that are based on knowledge produced by activism and praxis. This two pronged strategy to sustain and strengthen the formal research whilst expanding the scope of what is understood to be credible knowledge and evidence should be a key area of work for the Foundation. The deepen process also works through a regional convening in two parts: mini kopano where senior leaders in LGBTIQ organisations are hosted in a strategic thinking space to consider the contexts, share observations and experiences and to analyse these collectively; kopano, a bigger event of 200 activists, allies, donors, practitioners and specialists and others for similar goals but with more focus on engaging, learning and inspiring. These events are important space for thinking and learning. A key

recommendation here is to develop a much stronger, coherent web of learning throughout the Foundation and together with partners so that all processes throughout a one or two-year period are viewed as, amongst others, learning opportunities and spaces and connected in deliberate ways. This kind of intervention could both inspire partners to greater consciousness of knowledge production as a daily practice in their activism, offer others a glimpse of their work and ensure that high-cost outlay convenings carry greater possibilities of results and impacts at a personal, organisational and movement level. The possibility of contributing to “evolving activism” are therefore higher and cost-benefit ratios tilted in favour of such spaces. For this coherence in knowledge and learning to be achieved, dedicated staff to hold this work, support and inspire grant and strategic partners and staff to engage in this knowledge function is key.

### ***Expand the field***

The expand process has an intention to influence and support LGBTI activists to have wider and deeper reach and influence major power holders in society. These include family, religious groups, private companies, traditional, cultural leaders, governments and others. A model for this work has been designed, tested and developed with great success in terms of relevance [the work and the support is highly valued by the individuals and organisations involved and application of the ideas, concepts and strategies is significant]. The model offers promise of effectiveness and sustainability should the process of transition from incubation to independence be managed with good planning and strong management. The initiative is based on the idea that the foundation will start work with a sector and engage those in that sector, support them to take on the issues of the rights of LGBTIQ people and then enable their independence. PLUS is one example of an outcome of this model. A key task is for the Foundation to now infuse a critical analysis of the sector concerned [example, Religion Programme to grapple with feminist theology as well as liberation theology and broader critiques of religion. It is in the critique that the spaces to intervene in transformatory ways sits. Otherwise, this work is at best reformist which is a good-enough goal, unless the intention and claim is to transform. The same goes for the business work and building a critique of these models both from an anti-capitalist frame as well as using the frames gathering momentum at the United Nations Human Rights Council on “Business and Human Rights”, not just in terms of LGBTI people but across the board. The new strategy should frame the approach for a strong combination of conscious reform and transform elements that are separate and linked. Failure to do this will place the work at risk of having gains made rolled back after a few years, mainly because the systemic factors that feed the discrimination and violence are left untouched by reformist approaches that do not get at power. The Foundation staff should engage in learning on conducting and applying power analysis to disrupt entrenched power and privilege.

### ***Sustain the field***

This work is fundraising from local and international funders and inspiring a wide range of individuals and organisations to support the Other Foundation as friends and allies. The Foundation has been successful since the early phase of the thinking about this Foundation, in raising sufficient funds to support the Programme processes fully. Considerable effort is invested in this function as it is key to the success of the Foundation. The work on locally-raised funds has started with some early signs of the potential of this generating interest and income. The sustain work requires significant strategic thinking as movements are in crises on many levels, one of which is in terms of funding, many leaders in the sector and movements have been turned into fundraisers and are or becoming burnt out from the hostile context and the burden of resourcing the work.

The Other Foundation has been building “social capital” and individual giving. The work to seriously escalate individual philanthropy, especially in the southern Africa region, requires greater capacity and focus. It also should take seriously the crises of sustainability across the 13 countries more broadly and offer leadership with others working on these issues to think funding sustainability through strategies which are themselves sustainable and which can actually sustain the movements into and through the next decade. Again, issues of capacity to do this work in a proactive, collaborative and sustained way must be asked and grappled with.

## **ORGANISATIONAL DEVELOPMENT REVIEW**

The organisational assessment within this External Review covered seven main organisational development issues: Wellness, Learning and development, Communication, Governance, Human resources, Information and Communication Technologies, Financial resource management. The Evaluation assessment is dispersed throughout the Report. These carry great possibilities to strengthen the capabilities of the Foundation to deliver with quality within a context where the health and development of the individuals and the relationships are prioritised both because this matters in and of itself and because this is the most conducive environment for effective work.

### ***Wellness***

The Other Foundation promotes some activities related to staff wellness. However, they are insufficient to address the wellness challenges of the collective; they do not necessarily address burn out, the need for radical care and political attention. In addition, the primary feature of the culture of the Foundation, according to many staff and some board members is that of “delivery”. Delivery is key if activists and others are to be effective in building the world we want. Delivery requires matching attention to soul and humanity, especially in this work. The single most important shift in this regard which the Foundation should make is in culture so that the organisational space itself is increasingly authentic and caring and woven into mutual accountability for delivery.

### ***Learning and development***

There have been specific efforts to develop the individuals within the team and the team as a whole. These are commendable. The shifts in culture can enable the organisation to evolve into a leaning space where ideas, knowledge in practice and ever deepening learning and development are sustained. This will make for a happier space and team and will strengthen the work to evolve activists.

### ***Communication***

There is general agreement and affirmation amongst partners that the quality, look and feel of the externally directed products and information disseminated by the Foundation is of a high standard. This feedback is in keeping with the observations and findings of the Review. Partners across the board and other stakeholders are immensely appreciative of this. However, internal communication is weak and ad hoc and requires immediate attention. One on one communications with donors and grant partners is as urgent. A simple, accessible and implementable Communications Plan [as opposed to a media plan] and system is of critical importance and the regular monitoring of this in all teams and sub-teams with high level prioritisation of this function must be instituted immediately. According to the CEO, communication has been a key basis of assessment of performance in the team since the start of 2019. The Communications plan must therefore be instituted and communications

consciousness and capabilities developed amongst the team as a whole. This should also be linked to shifting organisational culture and asking hard questions about why this problem persists despite the measures that have been put in place. What are the consequences of failure to prioritise communications with grant partners for example? And what factors internally hinder progress in this regard?

### ***Governance***

The Board has a well-established governance framework including policies, bylaws and ways of working and is able to provide oversight of all the critical areas of the organisation. In keeping with the main conclusions of this Review, the Board should set up a task team or committee and work closely with the Director and staff to collectively strengthen the ways of working and culture so that dependence on the Director is reduced and that decisions are decentralised in practice with a flatter structure and shared leadership. This team should also oversee and support the work to ensure that wellness and learning is prioritised in ways that enable delivery to remain a strength. This can be done and there are numerous examples in similar organisations of where and how this can work.

### ***Human Resources Management Systems and Development***

#### *Review the Human Resource Manual*

The Foundation has made some important progress in the management of its human resources. A comprehensive Human Resource Manual which captures the policy and procedures and a system and mechanisms for its implementation is in place and functional. The manual was reviewed in 2018. However, a review of the Manual through a fully participatory process which is staff friendly and where trustees work alongside staff and an external professional to make proposals and engage in benchmarking will enable the human resource management function to be shifted so that it serves the new strategy and the shifts in organisational culture needed. This can assist the organisation to strengthen its commitment to good governance principles of transparency, accountability and meaningful participation and enable it to strengthen efforts started to better apply external goals to the internal soul of the organisation.

#### *A co-director model*

The Director carries a wide range of leadership functions including administration, technical work, decision making [from strategy and policy to operations, external relations, governance and programmatic] and significant fundraising accountabilities on which the entire organisational success depends. Further, in the first five years, there was significant centralisation of leadership due to multiple reasons. A shared directorship will enable the executive level accountabilities to be shared and complementary approaches to leadership to be available so that each Director is able to focus on what they do best, whilst reporting directly to the Board. We do not believe that the senior positions advertised will address the imperative to build shared leadership within the staff team.

#### *Remuneration*

The remuneration of staff is perceived by individual staff members as satisfactory. The policy sets the standard for benefits, setting of and adjustments to salaries. There is no salary scale. A salary scale is essential to outline the bands and the salary range in each band, ensure staff can locate themselves on the scale and understand their potential progression. This must be addressed.

### ***Information and Communication Technologies***

The ICT management function at the Other Foundation is held by the person responsible for communications. The basic ICT needs of the organisation are met and considered sufficient. However

as an organisation seeking to be future-ready, the Other Foundation is encouraged to explore how ICTs can further advance internal efficiencies as well as strengthen grant management and communications with partners.

### ***Financial resource management***

The Financial Management Policy is in place and clearly defined roles outlined and applied for the team in respect of compliance and support for the work and functioning of the organisation. It is commendable that the organisation has had unqualified audits each year since 2014, given the fact that it has been in a formative stage with multiple obligations, responsibilities and pressures. Capacity for financial resource management is set to be strengthened through the recruitment of an Operations Manager. The financial sustainability of the Foundation is a matter of concern and interest of all staff and such information should be regularly updated by the CEO in the Funding Register and made available to staff and any other party in whose interests this may be. An Audit Committee and a systems audit and/or benchmarking exercise would enable the Foundation to further strengthen the financial management function.

### **CRITICAL STRATEGIC IMPERATIVES**

The Other Foundation has performed very well and is on track for a second five-year period of stronger and more effective and sustainable work. The achievements in just five years is remarkable and the LGBTI community have been able to access space to further their contributions to learning and to learn and to access resources through the Foundation. Allies have stepped forward and begun to lead.

The five strategic challenges for this high delivery five-year old are:

1. Deepen the practice of Community Foundation. What does a community foundation look like and how is it different to other foundations? What does an African community foundation look like?
2. Become and evolve deliberately into future-readiness. What are the ideas and practices that will enable the Foundation to move into and through the new decade in ways that maximise opportunities of technology and trends in organising? What innovations are necessary and possible? How can the Foundation push the boundaries of organising in hostile contexts?
3. Influence and support the movements to develop capabilities to grapple with harmful movement dynamics and not to accept these as given. Many feminist and other formations have been naming and grappling with these questions and are now bringing these into movements building spaces. Are movements capable to “do no harm” to each other and thereafter, consciously engage in collective and community care and build the practice? What capabilities are needed for this?
4. Take space during the year of transition in 2020 to first affirm, celebrate and recognise the power of the Foundation and the LGBTIQ movements it serves. Consider a publication that honours all those who have contributed to the establishment and building of the work of the Foundation in some way;
5. Consolidate all that has served the LGBTIQ community and movement so well and rethink, reorganise and ready for a new cycle of community foundation action and delivery; work with others already making progress in building cultures of care, healing, learning and development.

In working to achieve these imperatives, the Other Foundation should identify and build and/or support the building of a new set of capabilities in the team, with partners and allies and with movements as part of building collective power towards achieving the changes the organisation is so passionate about.