EXPANDING THE FOOTPRINT

- The Ikhala Trust Story -

A strengths-based community development incubator and grant-maker in South Africa

Ikhala Trust is a responsive development incubator that supports
and invests in strengths-based and citizen-led community initiatives.

Vision

Self-reliant, confident and vibrant community partners envision and realise positive change in themselves and their communities.

Mission

To develop community-led initiatives in the Eastern Cape by building supportive relationships, enhancing capacity and facilitating access to funds.

Objective 1

Community organisations and initiatives grow their human, social, physical, natural and economic assets.

Objective 2

Grantee partners, NGOs and other stakeholders adopt a strengths-based approach to community driven development.

IKHALA TRUST

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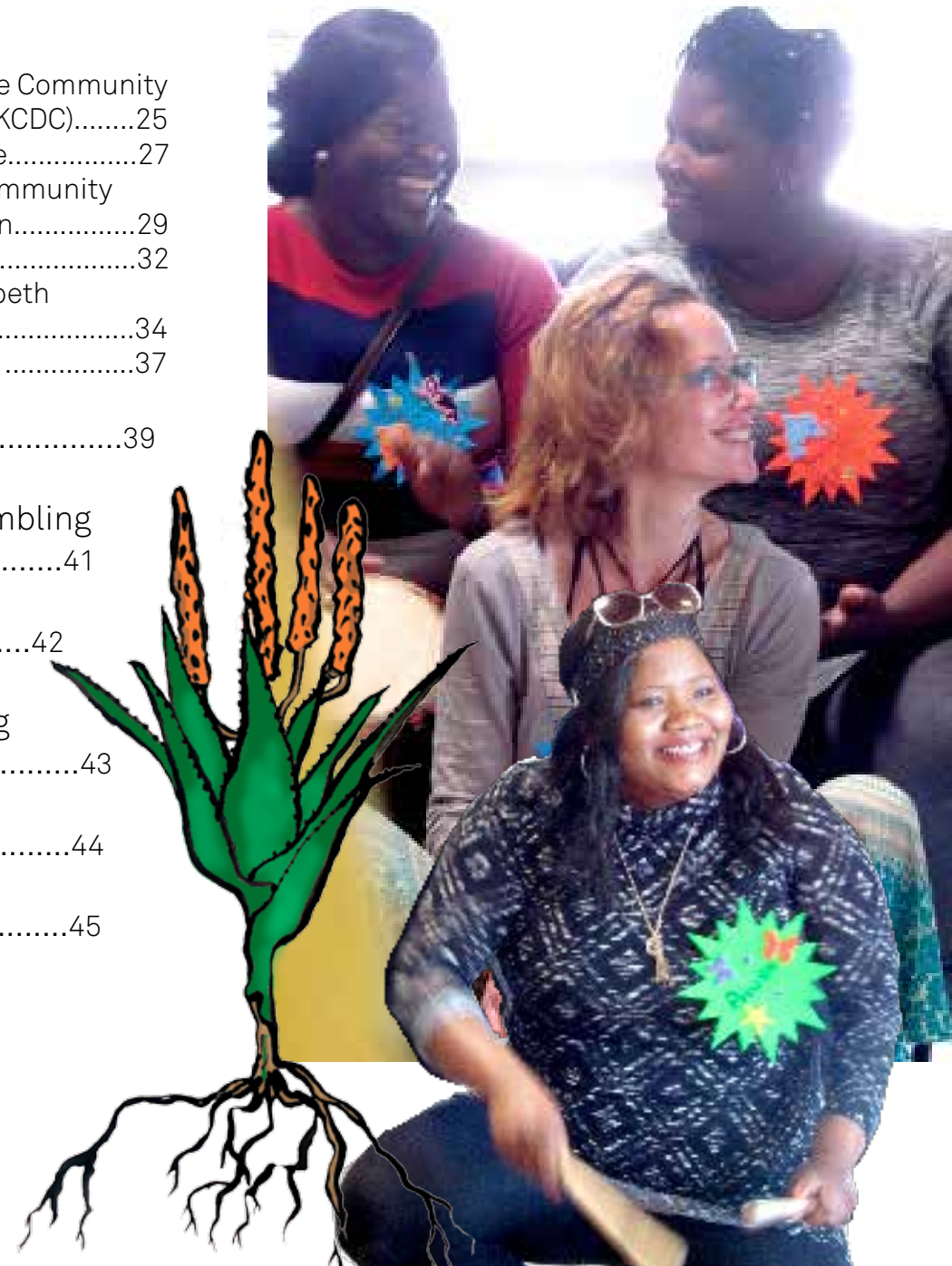fbook: ikhalatrust
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To stimulate conversation and advocate for the support of community philanthropy, we developed a road map that may help fellow travellers on their journeys of discovery, to understand how communities mobilise their personal and collective assets for their development. For this we require an appreciative lens that recognises that everyone has something to give, that acknowledges and values the assets of the communities; and that builds confidence and promotes self-reliance. Community philanthropy is about building consciousness and awareness of the value of community assets in its varied forms, and to be able to see that communities are shaping their own destiny and ours! Enjoy the journey.

(Bernie Dolley (Ikhala Trust) and Rita Thapa (TEWA) - Senior Fellows Programme at Cuny University in New York in 2015 -
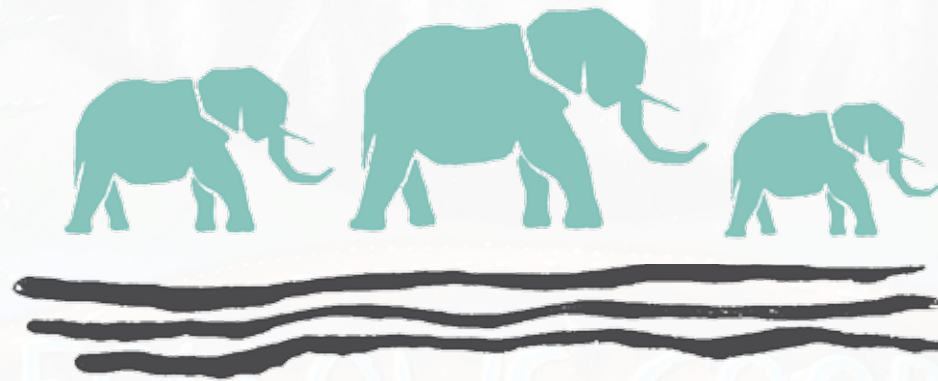
Preface

Alison Mathie

This case study profiles Ikhala Trust, a community grant maker operating within the Eastern Cape, South Africa. I had the opportunity to see this dynamic organization in action in 2009 when the Coady International Institute and Ikhala Trust found they were speaking the same language of "Asset Based Community Development (ABCD)" and began collaborating.

Small but mighty (and working with small and potentially mighty community-based organizations), Ikhala Trust has been at the vanguard of an approach to development assistance that is a clear departure from conventional philanthropic efforts. Its grant-making ethos is about valuing and investing in people and their assets, while helping to build capacities and networks so that community-based organisations can build community relationships themselves and connect to outside organisations to sustain their work. Ikhala Trust assumes that "everyone has something to give", whether time, money, or other resources, and that mobilising these are in keeping with deep-rooted traditions of giving and helping. As such, its work shines the light on the potential for community philanthropy to be the foundation for rebuilding civil society.

Providing small grants is just a fraction of Ikhala Trust's work. It recognises and accompanies potential movers and shakers in their communities. Money helps, but just as important is the mentorship and capacity building for community organizing and the influence Ikhala Trust can bring to bear on NGOs, donors, local government and the corporate sector to respond to local initiatives.

Here you will find stories of women organising to run small businesses, of communities mobilising to build a library, of school initiatives that engage parents and volunteers, of group homes for people with intellectual disabilities, of a computer training facility started by a young woman and her friends and family. What is important here is that Ikhala Trust has helped to unlock local strengths and capacities and nurtured them so that community organisations have the confidence to work effectively with the support of local community members. At the same time Ikhala Trust has linked these organisations to outside agencies. Without losing control of their own processes, organisations can see a pathway towards sustainability.

This pioneering work takes time, and it hasn't all been smooth sailing, but it is attracting attention from many people including the donor community.

Most people are familiar with the broad-brush strokes of development assistance and the main players: bilateral government-to-government assistance; services of decentralized local

government; philanthropic foundations; international and local non-government organisations; and (less well known and appreciated) a wide array of associations and member-based organisations existing at the local community level. These state and civil society actors all play an important role in correcting the distortions of the market and, however imperfectly, "democratizing" economic opportunity and realizing the rights of citizenship.

Yet the momentum for sustainable community development work can be slowed down by frustration. The weight of economic and political systems that reinforce inequalities can be daunting; and the complex relationships and dynamics of local community life can be hard to unravel. Often with limited knowledge of the communities where they work well-intentioned external agencies may inadvertently disable rather than catalyse communities and, especially if they focus on what is lacking in communities, rather than fully appreciating local assets and agency, and if they act as donors to recipients rather than as partners and investors. Acknowledging these shortcomings, many in the donor community are now asking hard questions about how to work differently with communities. This is why attention is being drawn to "community philanthropy" – how people help each other – and how outside organisations can complement this.

The South African context poses unique challenges. The legacy of apartheid has left many with an internalised sense of powerlessness. While the post-apartheid period has brought many benefits, including social grants to help people emerge from poverty, there are frustrations with externally planned community development programmes and a weakening civil society sector that cannot compensate for gaps in service delivery.

Ikhala Trust's response is to "go where the energy is" - identifying groups who are innovative and resourceful in helping others and working with them to build their capacity to be equal partners with outside organisations so that the work

can continue. In this way, a power shift is occurring: they see themselves as having assets and agency, and outsiders recognise their capacity.

The story of Ikhala Trust is told in the following pages. From its early beginnings, its evolution as a grant-maker and connector to an organisation with policy influence in South Africa is outlined. Some of its challenges and successes are described as well as reflections on where it is now on its journey. As such, the case offers important lessons for people in the whole community development ecosystem – community leaders, CBOs, NGOs, government, academia and the corporate sector. Most significantly, the story helps us all to see the potential for people organizing locally and informally through self-help networks and social movements, and how investment in community building initiatives is unfolding, breathing new life into civil society.

Enjoy following the footprints along the way!

Introduction

This story of Ikhala Trust spans over 20 years. It traces the journey of a community grant-maker (or intermediary donor) in South Africa supported by Misereor and the CS Mott Foundation since its inception in 2002. The intention is to offer a practical resource for development practitioners and grant-makers who seek to shift power to people - by valuing and investing in what people are doing and wish to do in pursuit of positive change, and assisting people to discover their strengths and assets.

An appreciative lens is part of Ikhala's 'DNA' - a commitment to support where seeds are already sown. This ethos has resonated in all aspects of its work and Ikhala has consistently promoted innovation, asset-based and citizen-led development – a paradigm shift away from traditional deficit-orientated or needs-based development practice.

The story is unique for many reasons. For instance Ikhala Trust does not dictate any prescribed sectors or thematic areas but prefers to co-invest where people themselves have already invested.

Ikhala appreciates and values community contributions in time, expertise, cash and in kind and regards these co-investments as assets. It establishes authentic relationships with grantees as learning partners and supports many learning networks and events.

Ikhala Trust believes that 'Money Follows Good Things'. It does not issue any formal "Call for Proposals" but remains responsive – seeking out and working with existing initiatives and going where the energy is. It flexibly co-invests where there is synergy through donations, matching grants and technical support. This requires a presence in communities – a firm footing on the ground. Remaining small and agile has been important and with two permanent staff for most of its journey, Ikhala remains lean and efficient - another unique feature.

There is much that can be written about this small organisation which already has a large footprint, especially in the Eastern Cape province of South Africa. There are many interesting pathways transecting its story. But we will continuously emphasise Ikhala's flexibility, responsiveness and assets orientation – where it is gaining influence, as well as international acclaim.

The story demonstrates how to invest from the inside–out, in a non-prescriptive and appreciative way, and shows how innovation and simplicity can boost organisational effectiveness. We will highlight the route the organisation has travelled and some of the diversions and
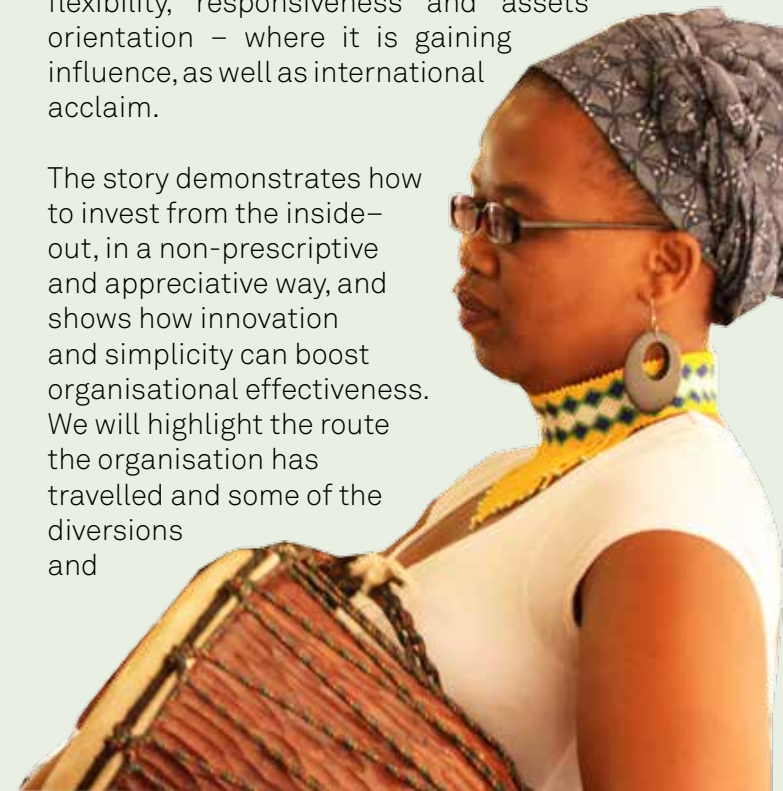
'bumps on the road'. We will also explore how the board, director and staff have, with good humour and optimism, navigated through challenging terrain.

The case study is a consolidation and celebration of Ikhala's work. It weaves together extracts from documents, reflections, interviews and quotes and draws from the institutional memory so that Ikhala tells its own story.

The Aloe Plant – Ikhala's Model

The word Ikhala means aloe - an indigenous plant in South Africa which has medicinal and healing properties. The aloe is resilient, widespread and thrives in arid areas and under adverse conditions. The aloe blossoms in winter, and its bright red flowers are a distinctive feature marking the Eastern Cape. The aloe aptly became the name and logo of Ikhala Trust and is chosen as a metaphor for this story:

THE LEAVES

This section looks at Ikhala's development practice – the way it extends its influence and supports citizen driven development through grantmaking (responsive investment), accompaniment and advocacy. The leaves are sturdy - they heal and nourish, and stories are shared of grantees and partners who have benefitted from Ikhala's support.

THE ROOTS

The first section looks at the internal conditions which provides stability and grounds all aspects of Ikhala Trust's work. It describes Ikhala's principles, governance, management systems and learning partnerships which root the organisation.
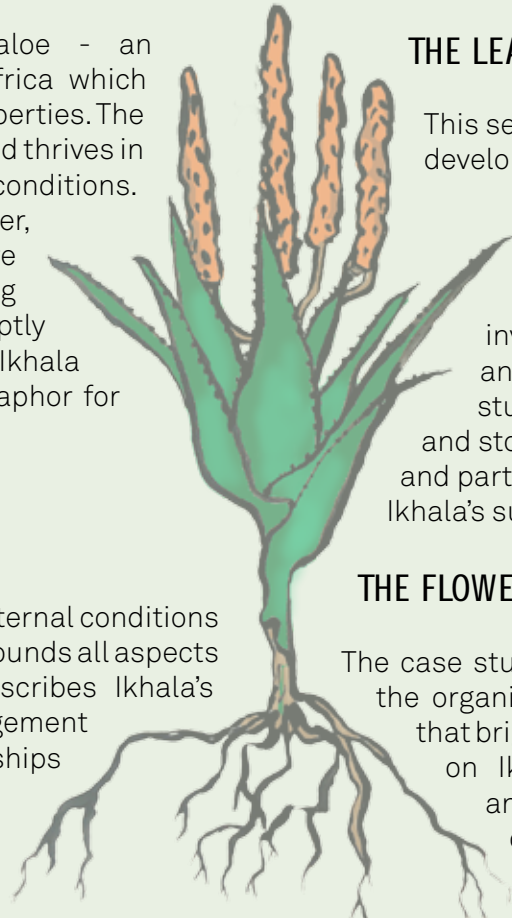
THE FLOWERS

The case study concludes by reflecting on the organisation's impact – the flowers that brighten the landscape. We reflect on Ikhala's approach to learning and share important lessons, challenges and questions that the organisation continues to grapple with.

Believe that change is possible. See the barren patch of ground, and be aware, that a garden can grow there.
— Anon —

1. Back to the Roots

1. Ikhala's origins

The concept of a delegated micro fund for the Eastern Cape took root at a workshop held in Cape Town in May 1999. The workshop, convened by Misereor, explored ways of strengthening co-operation and delegated responsibility between Misereor as the funding agency and their partners in South Africa. One of the principles discussed was subsidiarity – the concept that partners should make decisions where they operate, instead of waiting for responses from international development NGOs in the Global North. This, it was held, would assist South African partners to be more relevant and effective.

The Catholic Church in Port Elizabeth facilitated a consultative process that, over a series of meetings, brought together colleagues and activists in the development sector enlisted for their experience and skills. A core group of 5 women finalized the vision, mission, and purpose of the organisation, and suggested its name. In 2001, Bernie Dolley (Founding Director), left her position at the Church to set up the Trust and in 2002, Ikhala was registered as an independent value-based development micro-fund for community organisations.

"Ikhala Trust would be like an octopus – with many tentacles and flexible enough to get into even the smallest cracks." (Ikhala Trust: Our ten–year journey 2002 – 2012)

1.1. Why a Micro Fund in South Africa?

South Africa's development landscape in the post-apartheid 1990s was rich with rhetoric. Policy frameworks lauded the idea of people–centred and citizen-driven development. Yet, increased flows of bi-lateral aid, directed through the new democratic government, led to an unfamiliar culture of formality and bureaucracy. Civil Society Organisations (CSOs) that were able to operate with relatively informally and streamlined accountability systems were now competing for funding in the global development arena and experiencing far more stringent accountability and financial management compliance requirements, as well as a 'brain drain' as people left the non-profit sector to join government and corporate agencies. Their role and relevance in a democratic dispensation was also questioned:

"Many CSOs struggled to meet the new demands, in part because of the loss of leadership and management capacity, but also because of questions regarding their relevance and their role in this new context." (CAF, 2012)

Donor and government-led initiatives proliferated, yet many were 'top down',
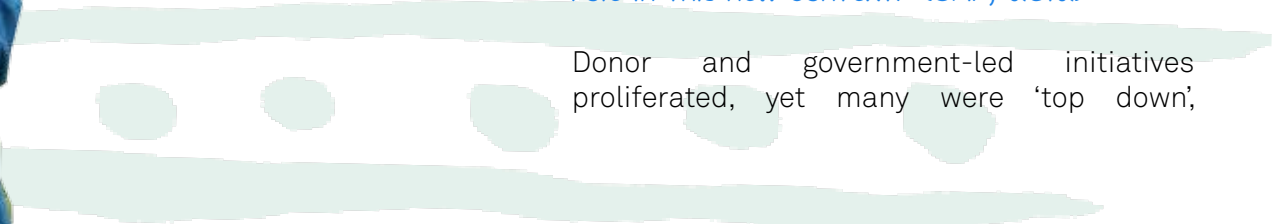
formulaic and based on what funders thought was needed. At the same time, people were independently forming social movements and community initiatives, investing their own resources to improve their situation. These indigenous forms of organising were 'off the radar', somewhat fragile and easily undermined.

The pioneers of Ikhala Trust recognised this contradiction:

"We could all see that there was a gap between small, incredibly innovative initiatives at community level that didn't have the institutional capacity and the networks to access the kinds of funding that they needed." (Theresa Edlmann, Consultant)

Ikhala Trust was formed with the intention to strengthen locally-based, citizen led initiatives with appropriate support (initially small grant funding) where they could develop at their own pace and on their own terms.

1.2. What is a community grant-maker?

"What a community grant-maker does, is to come alongside those individuals and small collectives, to honour and nurture the innovative, creative and contextually relevant ways in which community organisations work. The Community grant-maker steps into an absolutely vital gap." (Theresa Edlmann, Consultant).

Funding can be a double-edged sword. The demands of formal and rigidly organised donors can be overly prescriptive, and small organisations are easily shaken when attempting to meet donor requirements. Organisations need time and space to develop their structures and programmes based on internal values and organic decision-making. Appropriate grants are therefore critical.

Community grant-makers recognise the varied and organic forms that organisations take and seek to invest responsively and developmentally. Small grants are co-investments in people's skills, talents and networks. They respond to existing, usually smaller initiatives and are not intended for larger, professionally staffed non-profit organisations. They invest in self-help rather than service delivery, and community connectedness rather than assistance from external professionals and experts.

"Small grants are about helping people discover their own power (agency) and the power of community. Small grants are not an end. They are a means to an end, with the means, the process of doing, at least as important as the result." (www.grassrootsgrant-makers.org)

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1.3. Development Principles

"We are not coming to ask you what you want, what are your challenges and gaps, but asking what do you have? What are your strengths? It is an organic asset based community development approach. " (Chris Engelbrecht, Ikhala Trustee)

At the core of Ikhala's mission is to stimulate assets and agency at community level for social change. Essentially, Ikhala seeks to support innovative organisations who drive a social justice agenda.

Self-reliant, confident and vibrant community partners envision and realise positive change in themselves and their communities

The ethos is to sow where people have already laid a foundation and the principles adopted in 2002 stand true today and help Ikhala Trust remain grounded:

- Work with grassroots organisations and others who would otherwise fall through the gaps;
- Make small grants to small organisations;
- Act as a catalyst for other initiatives;
- Work in a non-sectarian manner;
- Hold a shared vision with organisations with whom we work, and
- Work from an appreciative approach.

"In many ways, an asset based approach was part of the original concept, even though we didn't have a name for it, we were wanting to work with existing initiatives, leaders who were already doing something in communities and provide them with support to help them sustain the work." (Theresa Edlmann, Consultant)

1.4. Ikhala's model

"Asset-based and citizen-led development is an approach that recognizes the strengths, gifts, talents and resources of individuals and communities and helps communities mobilise and build on these for sustainable development. By focusing on assets and capacities rather than needs and deficiencies – energy is directed toward opportunities at the community level, while remaining conscious of how the policy environment could be changed." (Coady International Institute and Ikhala Trust (2011)

Ikhala Trust has focused its efforts mainly on women in small rural villages, where poverty and inequality are highest. A grant will not be given unless social cohesion and mobilization are demonstrated by community partners and unless they have invested in their own initiative. Put another way, Ikhala's small grants build on people's assets.

Ikhala also offers training in Asset Based Community led Development (ABCD), Organisational Development (OD) and Project Management (PM), as well as mentoring, advice and ongoing support. Aside from funding and capacity building, Ikhala co-ordinates the distribution of in-kind donations like clothing, vegetable seedlings, second hand furniture, and office equipment. Ikhala also proactively links organisations with relevant networks. As organisations grow, they are better able to mobilise other stakeholders and engage with local authorities to be more responsive to community priorities.

"Big money is not the only form of capital, it's a partnership, some funders have financial capital but other forms of capital are of equal value, there's a very strong social fabric for instance and that is valuable, an interdependency, and that is where Ikhala has played a role in changing the power dynamic." (Andy de la Mare, Ikhala Trustee)

Over time, as a result of its advocacy efforts, Ikhala was approached by government agencies, donors and more formal NGOs working with local communities exploring an asset based approach. Ikhala started working with 'gapper' organisations, helping them to make their own 'paradigm shift' through training and capacity building and in some cases a grant to support a shift towards a more appreciative way of working.

1.5. Organisational Design

Ikhala currently has two full-time staff – the Director and Grants Administrator, and a part- time field worker. Ikhala resisted pressure to scale up and has kept staff and overheads minimal, maintaining a "thrifty efficiency" that is well respected.

"We are not creating another bureaucracy (the way) that most NGOs tend to go. We agreed we wanted to be small and would rather work through networks we had – through NGOs and likeminded people." (Chris Engelbrecht, Ikhala Trustee)

Instead, Ikhala ensures enough capacity through contracted service providers for essential support services (accounting, ICT, catering, travel etc), and by working with a network of Associates and Assessors who are brought in when required to conduct pre-grant assessments or to support specific activities. Ikhala has also trained trainers to meet the growing demand for local ABCD workshops.

This innovative 'blended workforce' arrangement helps the Trust remain lean and has worked well for the organisation so far - saving time and making best use of limited financial and human resources. However, it does present challenges to the organisation - one is of perception (is it really an "organisation" in the conventional sense of the word?) and the other relates to maintaining organisational coherence, quality standards and memory in a dispersed system. How Ikhala works to manage these challenges is elaborated in the next section.

Assessors

Assessors are Ikhala's "eyes and ears on the ground". They are individuals who have had a long relationship with Ikhala and are ethical, reliable and well-known development practitioners with local networks. Assessors visit prospective grantees especially in remote areas, and give feedback and recommendations. They also participate in Ikhala workshops and learning events.

Associates

Associates are contracted specialists who also have a longstanding relationship with Ikhala. They facilitate capacity-building, documentation, monitoring, evaluation and learning processes for the organisation in place of staff. Associates are also contracted to run training programmes, provide Organisational Development (OD) support and mentoring for grantees and partners.

Ikhala's work is relational rather than transactional. Relationships built on trust and mutual respect are at the heart of its practice.

"Ikhala is not an ordinary organisation but rather more like a focal point on a web of networks, the waist, which draws the threads together because of its founding on a people–centred approach, Ikhala's way is inclusive, drawing from everyone who is part of it." (The Project People, 2006)

Ikhala sees itself as an entity, a network that gathers around and comes alongside people who are already doing work. The idea of being a conduit and weaving relationships and ideas was part of the original model."
(Theresa Edlmann, consultant).

"Share your vision and plans with others who are working in the same field. Seek their advice and counsel. Learn from them. Draw them in." (Ikhala Trust Annual Report 2010–2011)

1.6. Leadership and Governance

Ikhala's Board of Trustees is key to the resilience and longevity of the organisation. The Trustees were approached purposefully because of their varied expertise, commitment to Ikhala's approach and social justice values. Trustees provide a sounding board to the director and guidance on strategic and programme development and implementation. An independent sub-committee of the Board (the Allocations Committee) adjudicates and approves grant applications.

The Board brings stability and credibility to Ikhala. Trustees share a common vision and ethos. They are visibly present, participating in learning events and training workshops to stay connected to the practical aspects of the work. They are deeply committed to the organisation, critically engaged and bring a solid and balanced perspective.

"The functionality of an organisation is directly proportional to the quality of relationships... We are peers and figure things out together, there is friendship and commitment, there's a heart connection to the work and people and interest in the work of the organisation is at the centre. The Board brings that cooling effect at heart (they) balance that excitement and passion which is central to what Ikhala Trust is about." (Sarah Hugow, Ikhala Trustee)

"It's a combination of things – commitment, people who understand the sector, who are specialists in development work, people with certain skills, people who are really rooted for me this is what has helped the Board, and also making sure that the Board does play the oversight role it is supposed to play." (Ncumisa Nongogo, Deputy Chairperson)

"It is not a hierarchical governance – everyone is equal, they all contribute, have a say and make decisions together." (Chris Engelbrecht, Ikhala Trustee)

Bernie, the director, is well known in the development sector as an inspirational leader, motivator and public speaker. She describes herself as "a nuts and bolts pragmatist" who likes to "get her hands dirty". She consistently highlights the importance of trust, respect and integrity in leadership and staying passionate and authentic. She is a gifted connector and intuitively brings people together.

"What she does better than anyone else I've ever met is that she is a connector, that role is so important because making all these connections in a system eventually brings it to a tipping point. She is amazing at that – networking, connecting and a lot of it is intuitive, a feeling or an idea. She puts things together, there is an alchemy and it works." (Sarah Hugow, Chairperson)

The director is personally involved in every grantee relationship - initial contact, conversations, visits, and strategic inputs. She gives detailed monthly feedback in writing to grantees in response to reports. She is available telephonically and is often approached as coach and mentor.

The director can easily access the Board which consciously operates on a "tight-loose" principle. Tight policies and procedures are in place, but the Director can act with a fair amount of latitude. This is due to procedural checks and balances for transparency and segregation of duties, as well as trust in the Director to make good decisions. Minimal bureaucracy has helped maintain organisational effectiveness and agility.

1.7. Partnerships and Networks

"Ikhala Trust was very aware of what it was very good at and where the areas were they would need 'bigger' and 'stronger' voices.... It was therefore absolutely necessary to seek alliances with other community grant-makers, academia, corporates, development actors, institutions and local and provincial spheres of government." (Bernie Dolley, Director)

Ikhala's mission requires that strong links are forged with a range of stakeholders who can bring their influence to bear on the development discourse locally and internationally. Funding partners like Misereor and CS Mott Foundation, Africa Groups of Sweden (Afrika Grupperna), ABSA, Eastern Cape Community Trust on Fisheries, VW Trust, Desmond Leech Bequest Fund, Gladys Niven Trust and LegalWise have journeyed with the organisation. Funders are attracted to Ikhala because it has minimal overheads, reputational integrity and a hands-on developmental approach.

"In the funding space we talk about reckless grantmaking people not doing due diligence or giving proper support and that can be dangerous. What Ikhala's done is to say we will do due diligence, provide funding, but we are also going to build your institutional capacity. That differentiates Ikhala from other funders in the field." (Andy de la Mare, Ikhala Trustee)

Ikhala also acts as a conduit, linking donors (private philanthropists) with appropriate CBOs and managing funds on their behalf. In such instances, it is important to find responsive investors who are not prescriptive and are willing to support an assets orientation.

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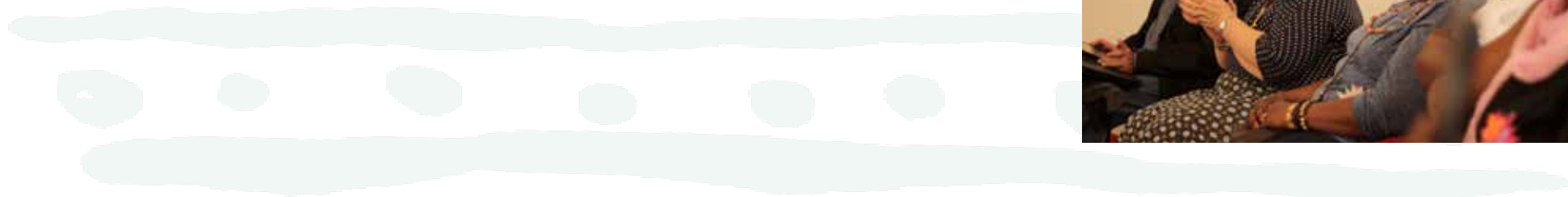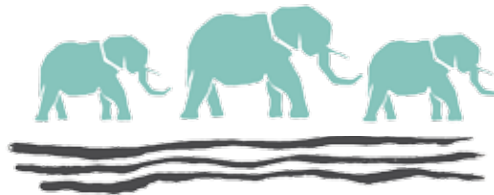
2. The Leaves – "Money Follows Good Things"

"Self-sustaining, self-driven (organisations) – people taking ownership and responsibility and not overcomplicating their work. There is clarity – efforts are small and simple and there is a focus on fundamental principles". (Ikhala Trust ABCD Festival Report, 2016)

Ikhala Trust supports organisations that value and use their skills, abilities and assets. The organisation has tried to break convention and prides itself on 'doing things differently'. Ikhala does not solicit applications through a traditional Call for Proposals, but works organically - seeking synergetic partnerships through networking, referrals and vigilance – recognising innovation and opportunity where it arises.

In recent years, Ikhala also supports NGOs who are committed to shifting their paradigms and are intentional and deliberate in adopting an asset based approach. In other words, learning partners who work at community level and are influencers within their own sectors.

Ikhala is a Responsive Investor – building on what exists, where people themselves are investing. The community organisation defines its own pathway and success indicators. This is different from the more common paradigm, where donors direct funding to sectors with predetermined service delivery outcomes.

To date, Ikhala Trust has disbursed grant funding of +/- R6,8 million to 189, mostly small community-based organisations operating in the Eastern Cape. 95% of grantees do not have offices and are unlikely to interact with or receive funding from large, traditional donors.

There are two distinctive features of Ikhala's grantmaking process:

Flexibility

The criteria for application are intended to be flexible to ensure that worthy organisations are not excluded. At the same time, Ikhala requires that certain conditions have to exist within the applying organisation for financial control and accountability. Ikhala considers the level of development, skills and knowledge within organisations and meets them where they are.

Responsiveness

Ikhala strives to move quickly in response to applications. The model is responsive, transparent and efficient and the turn-around time from receipt of an application to a signed grant agreement and disbursement can be less than a month.

"With many conventional funders, you have to plan and plan ahead and hope that everything plays out that way and if not, you panic because funders don't always understand the flexibility and adaptability needed within the more structured plan. In this way Ikhala is different as they fully understand this, they operate organically and go where the energy is. It is not an invasive way of funding, it is respectful, and I really like that." (Carla Collins, Ikhala Trust Associate)

"Ikhala's way of working with these organisations supports and enhances capacity and feeds directly into the impact that they are having (through) its capacity-building, people-centred, anti-bureaucratic approach to development." (The Project People, 2006)

"IKT is a responsive funder and not a cookie cutter approach. IKT is one of the best models of success and stability in the Eastern Cape and they have been fairly steady in that space." (Hilda Gertze, Southern African Community Grantmakers Leadership Forum)

2.1. Grant-Making Cycle

Step 1 — Referrals / Networking invitation to submit introduction letter

Step 2 — Telephonic follow up Application form & criteria shared

Step 3 — Application Submitted & Baseline completed

Step 4 — Assessment & Recommendation to Allocations Committee.

Step 5 — Approval & Grant Agreement Signed

Step 6 — Disbursement

Step 7 — Annual Festival & Grantee Awards

Regular Communications, capacity building & accompaniment

Monthly Report

"The more that organisations can step away from a sectoral or silo-ed approach to development and look for opportunities to find what they are looking for in communities (where) that is already happening and invest... and how we can build on what is already there." (Gord Cunningham, Coady International Institute)

2.2. Criteria

Ikhala is often the first external funder that a community organisation may have. The criteria used to assess potential grantees are not onerous and have remained fairly consistent over time:

- The organisation must be located in a disadvantaged urban or rural community and must meet a real need identified by the community.
- It must be at least 12 months old and must have been actively serving their community for at least 6 months;

- It must be run by an official committee who keeps records.
- It must have a constitution and be registered or seeking registration with the Department of Social Development's Non-Profit Organisation (NPO) Directorate.
- It must have a Bank Account with a recognized banking institution.
- The organisation must have received little or no funding from outside sources, and operate with an annual budget of less than R200 000.00 per annum.
- The organisation must keep records of all financial transactions.
- They must be prepared to disclose any other sources of funding.
- They must be willing to co-operate with other stakeholders.
- They must be able to demonstrate how they mobilise local assets i.e. physical, financial, social, natural and human assets.
- They must be willing to participate in Monitoring & Evaluation and learning activities with Ikhala Trust.

Community partners supported by Ikhala Trust by and large work as volunteers i.e. they contribute from their own pockets and use their own assets to support activities in communities. They often are both the beneficiaries of services as well as those executing activities.
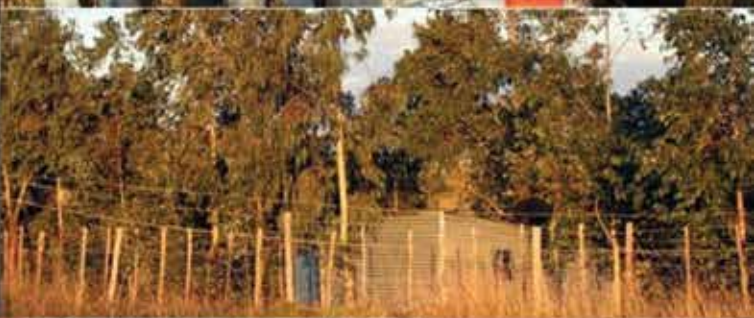
What Ikhala Trust Funds

Ikhala Trust is one of the few community grant making organisations supporting running costs like airtime; travel; refreshments, catering and administrative costs like bank charges, stationery and photocopying. In exceptional cases the Trust may approve a 'gift' for volunteers as an incentive and source of encouragement, though this is not common.

What Ikhala Trust does not Fund
• Building of structures;
• Purchase of land/buildings;
• Emergency funds to meet shortfalls, loans or stand surety for loans;
• Running costs only;
• Salaries and stipends;
• Individual studies or studies abroad;
• For-profit organisations;
• Equipment only;
• Payment of accounts in arrears i.e. Eskom, Telkom and other such bills.
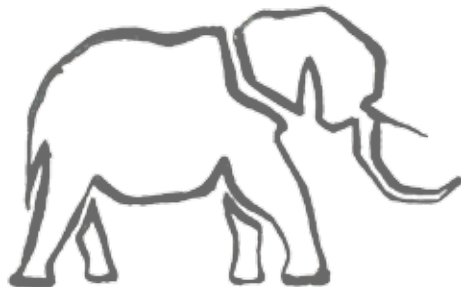
2.3. Grant Applications

Applicants approach Ikhala, usually after they have been referred by other organisations or individuals. Sometimes Ikhala meets potential grantees at learning events, training courses and by looking for innovation stories in the media. Ikhala also reaches out to past and current grantee partners, NGOs and other donors. As a result of its networks, Ikhala has a known, reliable reference point when it comes to screening.

If there is synergy, Ikhala will have a conversation with the organisation and share the funding criteria. They will receive a letter explaining how Ikhala operates and after an application form is sent to them, it is most likely that there will be a good fit and that the application will be supported.

The application form is simple and available in English and isiXhosa - the widely spoken local language. Ikhala staff are available to assist with applications if needed, for example, where groups struggle to articulate clearly due to literacy or language issues.

Once received, the application is processed. Following a desktop assessment, staff and/or assessors usually visit the project and provide a report with recommendations. This brings more understanding of the context and of other local stakeholders who could possibly assist. The applications are assessed against a checklist, and an appraisal report is presented to the Allocations Committee, who may request further information. The potential of the people as well as the project are considered with care. If the Committee is satisfied, a grant is approved.

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The organisation is informed of the outcome and if successful, will be advised of the contracting process. Two copies of the Grant Agreement, with several blank copies of the monthly report template is posted to them. This assists especially remote organisations to comply with reporting requirements. One signed copy of the Agreement is returned to Ikhala Trust.

Ikhala Trust's grantmaking process centres around relationships. If an organisation is not a complete fit or does not meet the funding requirements – they are not simply rejected, but often offered advice, mentoring, or referral to others. They may be invited to Ikhala's capacity-building programme and could re-apply in future.

2.4. Grant Size

Grants vary depending on the kind of organisation and their activities, ranging on average from R10 000 – R30 000. In exceptional cases, there have been grants of up to R50 000. This depends on the nature of the organisation and duration of their relationship with Ikhala Trust.

Initial grants are intended to assist emerging organisations to develop basic organisational systems including financial management and reporting. Ikhala does not sign multi-year agreements as it needs to constantly raise money from back donors for on-granting. Grants are therefore for a maximum twelve-month period and organisations may be invited

to re-apply based on reporting, the relationship and how they fit with Ikhala Trust. Ideally, the organisation will transition ("graduate") from Ikhala and add other investors to their income mix after two or three funding rounds.

There have been many discussions over the years about whether the grant size should be increased but there is general consensus that the range gives sufficient leverage for small organisations. Essentially, the grant size is manageable and limits risk.

"Appropriate grant size is critical. Many promising organisations have been overwhelmed by the demands of donors who make large grants and insist on significant scale-up while undermining local leadership and community paced-development. Organisations need time to develop their structures and programmes based on internal values and decision-making."
(Ikhala Trust External Evaluation 2017, Mutengo Consulting)

2.5. Grant Disbursement

Ikhala Trust disburses funding in different ways. Generally, a new relationship will start with monthly instalments. If all goes well, and there is demonstrated management capacity, there is a 60:30:10 split over the contract period.

Where problems occur, Ikhala staff are sympathetic and proactive in terms of giving advice and support. However, if communication, reporting or delivery fails - Ikhala will suspend the grant.

2.6. Training and Accompaniment

Ikhala goes beyond the traditional role of funder. It is actively and intentionally involved in building the capacity of grantees. Capacity building, accompaniment and technical support strengthen organisations and impart skills. Training courses are held annually in ABCD, Organisational Development (OD) and Project Management. Specific technical training (e.g. computer skills, business planning and report writing) might also be offered and are usually outsourced where Ikhala does not have capacity. At least two people from each grantee organisation are invited to training and learning events to encourage peer support and minimise the risk of knowledge 'assets' leaving the organisation should individuals leave.

"(Ikhala Trust) combines an assets-based approach and training methodology, including a range of tailored capacity building initiatives to strengthen community partners. When used in conjunction with small grants, the Trust has achieved far more than the mere provision of financial resources. This combination of capacity building and seed funding is regarded as an effective developmental grant making model." (Ikhala Trust External Evaluation 2017, Mutengo Consulting)

2.7. Field Visits

"It is only when you take time to meet with people where they live and work that you really understand the trying conditions under which they are meant to do their work." (Ikhala Trust Annual Report, 2011-2012)

Field visits are an important part of accompaniment and nurture relationships with grantees and networking partners. The field visits are opportunities to verify progress, gain a real understanding of communities and if necessary, assist organisations with their administrative and monitoring systems. Many organisations find written reporting challenging and reports do not always reflect the reality of their work. Field visits are critical for Ikhala's own monitoring.

Field visits are also an opportunity to link organisations with stakeholders and other service providers, and generally acknowledge and appreciate the work being done. These visits are considered a highlight by organisations and are highly valued.
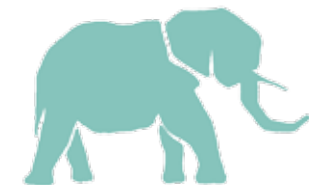
2.8. Reporting

Monthly reports are required from all community partners. The format is a simple '4 pager' highlighting activities, impact, learning and expenditure. Grant instalments are paid if reports are satisfactory and reflect progress. Through monthly reports, Ikhala can monitor financial and project performance and immediately pick up any inconsistencies or problems for corrective action. Evaluations have highlighted that monthly reporting builds Ikhala's relationships with grantees and are reflective opportunities for grantees to assess their own work.

2.9. Monitoring, Evaluation, Learning and Documentation

Noting that monitoring and reporting was a challenge for many organisations, and prompted by the realisation that evidence-based results are essential for advocating the ABCD approach, Ikhala recently developed a monitoring tool based on 'five assets' that offers grantee organisations a simple but effective way of monitoring progress and communicating results. The tool is simple, accessible and easy to adapt and is being rolled out to strengthen Ikhala's internal monitoring. Some partners have also applied the tool as part of their own monitoring system and there has been a cascading effect.

Ikhala Trust also commissions external evaluations and rapid appraisals and hosts periodic reflective sessions with Board, associates and learning partners. Its work is well documented through newsletters and reports which are accessible through Ikhala's web site.

Transformative
Learning

Energy/Vibe
Wisdom

Humble
Environment as teacher
Motivating
Relevant
Trust
Emotive
Openness
Out of comfort zone
Connected to nature
Support
Relationship
Role - Play
Spiritual
Celebration
Appreciation
Practical
Relatable stories
Accountable
Learning Pathway
Willingness
Self awareness
Exposure
Informal
Demonstration
Poetry
Multi-Media

2.10. Celebration

"At Ikhala Trust we have opportunities on a daily basis to celebrate the small things. Enough of the 'small things' must surely cause a major ripple." (Ikhala Trust Annual Report, 2010–11)

One of the most significant events of the year is the annual learning event combined with Grantee Awards. Certificates of Appreciation are awarded to all grantees to recognise their strengths, efforts and progress. The "Grantee of the Year" receives a special award and small cash prize.

Since 2015, Ikhala began hosting ABCD festivals which has become a signature event for the organisation. Themes have varied: 'Small is the New Big' (2015), 'Head, Heart, Hands and Feet' (2016); 'Feel the fear and do it anyway' (2017), and 'Our Stories Matter' (2018).

Festivals provide an important space for community and NGO partners to network and share experiences and insights around asset-based approaches and are intended to support a growing community of practice.

"One of the main things I have learnt is that development is not a once off. Ikhala opened my eyes and heart to the fact that development is based on relationships. If it is good and beneficial to everyone, it should continue. As long as that aligns and the ethos aligns – the relationship can go on." (Carla Collins, Ikhala Trust Associate)

Case Study no.1
KWENZEKILE COMMUNITY DEVELOPMENT CENTRE (KCDC)
(Bongiwe Ndakisa - Director, KCDC)

Kwenzekile Community Development Centre (KCDC) was inspired by Bongi's late mother who discovered her daughter's passion for computer technology. After Bongi completed a sponsored computer course, her mother encouraged her to share her skills with others. In 2010, Bongi started KCDC with the support of family and friends. She bought a few computers and friends contributed others. With 9 machines in hand, she was ready to start. She approached neighbours and local leaders to form a Board, and began operating a small computer training facility and internet café from a rondavel (hut) in the family homestead. The organisation formed a partnership with READ Educational Trust and a local primary school and together established a library and vegetable garden. KCDC also partnered with the University of Witwatersrand to expose youth to career pathways and nurture ambition.

In 2013, KCDC met Ikhala Trust through a mutual contact. Impressed by the tenacity and resourcefulness of the youth, Ikhala readily invested, becoming KCDC's first funder. After three months, KCDC was invited to attend Ikhala's ABCD training course. Ikhala also linked KCDC with Smartbytes – a computer company who helped accredit its computer training. This gave the organisation credibility and traction, and has been key to its sustainability.

KCDC's computer course is now well established, and widely known, and over 200 youth in Sidwadweni and surrounding villages have been trained. Youth and returning graduates have become volunteers at KCDC, giving extra lessons in Mathematics, English and Science. KCDC expanded sports, arts and culture activities to showcase the gifts and talents of youth. One of KCDC's most ambitious undertakings has been to administer bursaries and place youth in tertiary institutions. They received a generous donation from the New Settlers Foundation with Ikhala as an intermediary. Twenty youth completed their studies and six are employed full time. KCDC also expanded its donor base with the Desmond Leech Bequest Fund, Gladys Niven, Donaldson Trust and LegalWise funding channelled through Ikhala. Since 2011, Ikhala invested over R550 000 donor funding to KCDC in administration, equipment, project activities and staff development. Ikhala also sponsored a strategic planning workshop to assist KCDC to gain more clarity and direction. Ikhala regularly visited the organisation and attended KCDC graduations. They also helped KCDC make important linkages in the region and invested in staff development.

In 2015, Ikhala helped KCDC carve a new pathway. They linked KCDC with the Catholic Development Centre (CDC) – another grantee partner, for mobile computer training and sponsored the first mobile course in a remote village. KCDC was soon approached by other villages and then clinics and schools who were interested in training. The Department of Education has since equipped rural schools with computers and the demand for KCDC training is booming.

Report writing was never a strength of the organisation. In spite of mentoring offered by Ikhala over the years, reporting remained a thorny issue. KCDC also found it difficult to
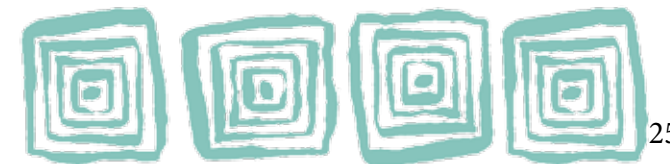
sustain its varied activities, and retain voluntary staff. Following a strategic conversation with Ikhala, KCDC took a decision to register a business and pursue income generation independently. KCDC maintains its non-profit 'arm' with an independent Board and in time, intends to fund projects through a thriving business, but currently sustains itself with its own income generation. KCDC has graduated from Ikhala as a grantee, but remains a firm learning partner and critical friend.

"With all our funders that we have met over the years, we haven't had a relationship with them like we do with Ikhala… it is a very engaged relationship, there is a lot of interaction, follow-up and visits. The most important thing that Ikhala emphasised was sticking to your vision and mission and really working towards it. If you start with Ikhala, you will start in a very good place – it is not just about the funding, but the space Ikhala gives you to engage with other organisations and grow." (Bongi Ndakisa, KCDC)

Case Study no.2
SIYA SONKE
(Anne Loeffler- Director, Raphael Centre)

Situated in Grahamstown in the Eastern Cape, the Raphael Centre started as an HIV and AIDS community initiative in 1998. The Centre began offering voluntary counselling and rapid HIV testing on an immediate walk-in basis, becoming the first non-medical site to achieve accreditation in the area as an HIV testing and counselling centre. From 2006 the Centre was still offering two main services, but found it harder to attract funders and compete with government services which had now improved. Between 2008 and 2012 the Centre was without a clear direction and almost closed several times due to a funding crisis. Mid-2013, staff made a courageous decision to reflect critically on their work and assess whether the Centre could still play a positive role. Research and hard, honest reflection led to the realisation that the welfare model adopted by the organisation had encouraged dependency and the organisation would need to change.

Bernie Dolley, the Director of Ikhala Trust was invited to give input on asset based community driven development (ABCD) as an alternative. The seminar resonated well with staff who felt that ABCD might offer a new framework for the organisation. Ikhala Trust commissioned a strategic planning and organisational development (OD) process using ABCD as a methodology. The full staff compliment has also been trained by Ikhala Trust in ABCD since 2013.

Raphael Centre began to shift its paradigm by integrating Wellness into its identity and broadening its mandate to incorporate community development work. In 2017, they offered ABCD training to adults and youth and Siya Sonke emerged as a community driven partnership. Siya Sonke are 36 families from Joza (a peri-urban community) of which 86% are headed by single mothers. The majority left school before they could reach grade 12 and 84% were unemployed and relied on seasonal jobs or welfare grants as their only source of income when they began engaging Raphael Centre. Others were part of government employment initiatives and early childhood development centres and received a monthly stipend.

Raphael Centre with the assistance of Ikhala Trust has supported Siya Sonke since inception through ABCD training, weekly life-skills and tutoring sessions for children, family asset-inventories and development planning and hosting Siya Sonke meetings. Siya Sonke formed five entrepreneurial groups to assist one another in formalising and establishing their businesses (crafting & sewing, farming, catering, early childhood development and small traders). Raphael Centre also linked Siya Sonke families with other community partners to

HUMAN ASSETS

SIYA SONKE

Vision

In our healthy community, there are active, engaged, forward-thinking citizens. Everyone feels they belong and have value to add in a safe environment. It is a community that shares its assets, which includes, but is not limited to knowledge, skills and resources to ensure everyone's basic needs are met. We are comitted to restoring and maintaining a good natural environment. Everyone has access to, and is supported by, quality infrastructure, responsive services, and ethical governance / leadership.

Vision

Raphael Centre

further skills development and collaborative opportunities. Siya Sonke is now at the centre of the organisation's work.

The Centre has recently adapted and applied Ikhala's monitoring tool. The overall trend in a recent internal review showed growth in all five asset-categories amongst Siya Sonke partners. The most dramatic improvements were among the Human Assets (nearly 40%) and Social Assets (nearly 48%). This was followed by growth among Economic Assets (25%), Material Assets (23%) and Natural Assets (20%). Yet, downscaling trends were to be found among some subcategories. For example, six people scored 'Infrastructure' with decrease, four individuals 'Environmental Cleanliness', three 'Food Production' and two people reduced measures of 'Land Use'. This was due to less time capacity, moving home and declined standards of government service delivery (e.g. supply of clean water, proper roads, housing, waste management).

The review highlighted that the approach of 'start by using what you have impacted people who have come to realise the resources they have and how these can be mobilised through their social networks.
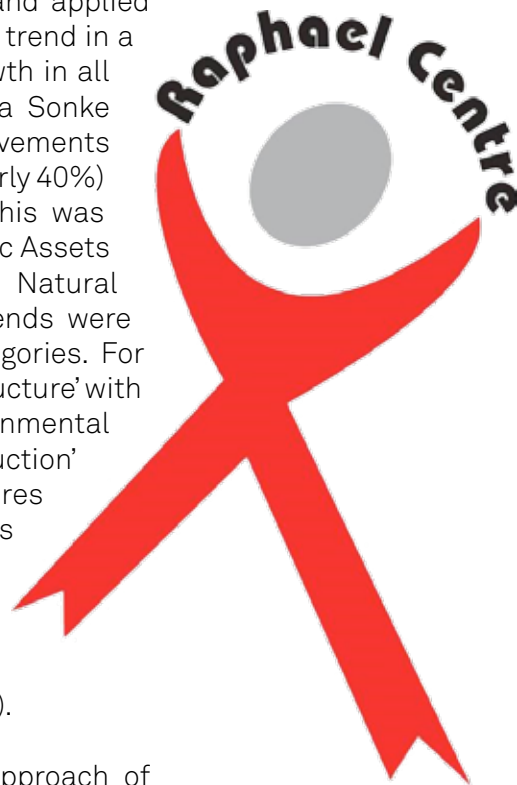
SOMILA COMMUNITY DEVELOPMENT ASSOCIATION

Alice is a small rural town in Raymond Mhlaba Local Municipality - Amathole District, Eastern Cape. It is both a service centre and University town, being the home of Fort Hare University. Alice is an historic town that was once pristine and boasted a renowned historic district including Lovedale College which birthed a generation of revolutionaries and activists. An estimated 60% of the population today, depend on social grants and 80% are unemployed. Most communities in surrounding areas are involved in some way in agricultural activities, to supplement their income.

Somila Community Development Association was established by two community leaders in 2012 as an umbrella organisation, to co-

ordinate, facilitate and mobilise resources for its membership of grassroots community-based organisations (CBOs). The organisation serves as an intermediary between donors and members, provides administrative and technical support, creates learning and sharing platforms and monitors member progress as well as their legal standing.
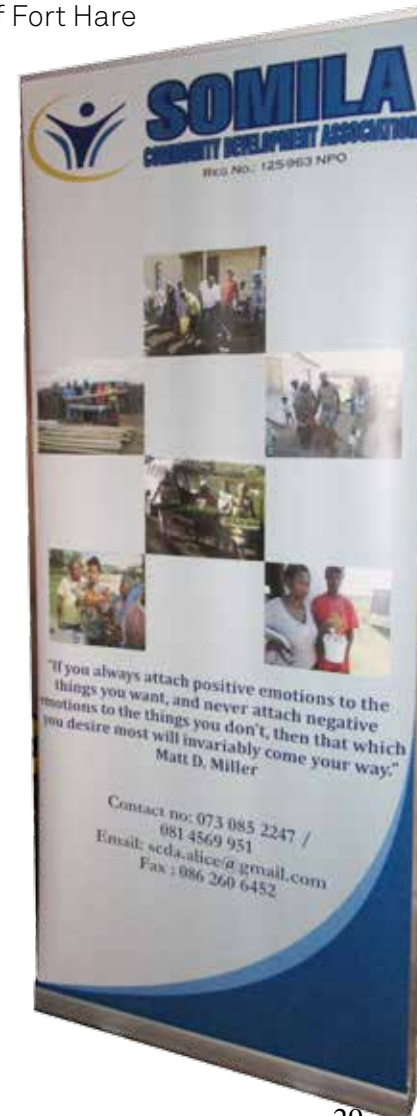
Somila initially focused on information dissemination, assisting households to access information, resources (e.g. government grants, food parcels) and opportunities. Through a partnership with World Vision and Heifer International in 2014, Somila promoted sustainable agriculture. These past few years, Somila's focus has shifted to providing technical support to member organisations (rather than households), assisting them to register as non-profit organisations (NPOs), open e-mail accounts, access funding and resources, as well as training opportunities. Many organisations have benefitted from this service and some have received substantial funding or material support as a result. There is currently a Board, Advisory group, two staff members and approximately 30 member organisations, predominantly involved in food security, Early Childhood Development and services for the Elderly.

Ikhala Trust awarded a first grant to Somila of R8000 in 2013, and over five years, invested a total of R170 000 into the work of the organisation. Aside from direct funds, Ikhala also provided training, advice, technical support and distributed donations of clothing, material and other resources. Although Somila had other sponsors, Ikhala was its only consistent donor.

Somila was also awarded Grantee of the Year in 2016.

Somila has impacted community organisations in its area. Some members have successfully accessed funding as a result of Somila's efforts, for example, from Donaldson Trust (R36 000) and the National Lottery Distribution Fund (over R3 million for a pre-school). Other funders (e.g. Breadline Africa) have been approached and shown interest in supporting development activities in the area. The organisation has hosted many information sessions and networking events. Beyond technical and material support, Somila is an antenna – constantly seeking information and opportunities to assist its members.

Somila's network expanded over the years including its partnerships with development agencies. Somila has always encouraged people to use what they have, especially their land. Through Ikhala Trust's assistance, Somila's members also received training in asset based development which boosted local innovation and opportunity.

Somila has been noticed locally and within the Province and in 2015 was awarded the Best Community Based Organisation in the Municipality. They received R50 000 which was used to purchase a second-hand vehicle. In addition they were given a disused building through the Department of Public Works from which they now operate.

Ikhala exited in 2018, once Somila demonstrated ability to expand their networks and partnerships, and began to attract other, larger donors. Whilst Ikhala Trust no longer funds them - Somila continues to operate and provide services to its members with a strong collective focus on agriculture for sustainability.

"I would like to thank and voice our great appreciation for the support and empowerment in training, capacity building and development of our organisation not forgetting the financial support and mentorship we gained from Ikhala Trust. We are excited about the doors that you have opened for us." (Lunga Mazwana, Somila Community Development Association)
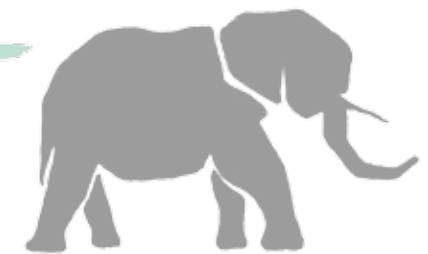
2.11. Advocacy

"More and more, in different ways – Ikhala is being called to emphasise and foreground the notion that citizens are potentially powerful agents of change, and that as development practitioners –we need to focus more on assisting communities, groups and individuals we work with claim this democratic space – instead of being endlessly reliant on others. An effective and responsive state, depends on an active, engaged citizenry." (Sarah Hugow, Chairperson, Ikhala Trust Annual Report, 2008 – 2009)

The story so far has presented Ikhala Trust's approach to community grantmaking as a responsive investor supporting citizen-led initiatives, combined with supportive, appropriate capacity-development and accompaniment. However, it is important to emphasise the shift that took place in the organisation as it observed how over the years a needs-based approach came to dominate South Africa's development landscape and how deficit-oriented thinking perpetuated dependency. Whilst a social grant system injected financial resources into communities, reliance on grants has contributed to a more passive citizenry.

The proliferation of bi-lateral aid and government-led programmes has prompted many community organisations to formalise and change their structure to attract government funding. Large grants also brought competition, conflict and entitlements which has crippled many small organisations. The Eastern Cape countryside is marked with many 'white elephants' (e.g. derelict buildings and unused tunnel farms), representing failed funded initiatives.

Ikhala found it increasingly difficult, over time, to identify eligible community organisations to support – that is, organisations who developed organically, using their own assets. Grassroots organisations, in competing for external resources were following funding directives at the expense of their own organisational autonomy. It became harder to find authentic examples of community driven development and Ikhala's grantee pool began to shrink:

"What has happened was that over time (Ikhala) struggled more and more to find organisations that have managed to sustain themselves at a community level in the midst of the huge social, political and economic stressors." (Theresa Edlmann, consultant)

Ikhala realised they needed to proactively influence an environment where citizen driven development could flourish.

Shifting Paradigms – Building Consciousness

The organisation responded by broadening its strategic focus and intensifying advocacy work. Buoyed by confidence in the outcomes that community partner organisations had achieved, Ikhala proactively challenged the dominant needs-based paradigm used by NGOs, donors, academics and government by advocating an asset-based approach. Ikhala began hosting ABCD training and learning events as well as annual festivals promoting asset-based citizen driven development. Ikhala also began to accompany new learning partners including established NGOs, local authorities and academics seeking to shift their development approach.

ABCD fundamentals was also introduced to NGOs and donor organisations as short 'sensitization and awareness' sessions, especially targeting senior managers and leaders. Over time, as influential stakeholders began to show interest, Ikhala hosted training courses where representatives from these groups were trained alongside community partners. These sessions created a diverse multi-stakeholder platform for meaningful dialogue and exchange of information and ideas, bringing together development actors who would rarely meet in a shared learning space.

There is a re-balancing of the focus of the Trust, moving from a traditional focus on grant-making to one where relationship building, capacity development and policy advocacy are of equal importance to our work. This seems to be a natural evolution of our thinking as we engage stakeholders on the most effective way to catalyse sustainable community-led initiatives as opposed to donor hand-outs. (Sarah Hugow, Ikhala Trust Annual Report 2014 – 2015)

"We are not just raising awareness of rights and responsibilities but are ensuring that if there is to be a citizen engagement, those 'talked' about are at the centre of our efforts and not on the periphery. The strategy was to enable them to identify their strengths and by recognizing and utilizing their assets, ensure that they came to a discussion and dialogue table as equal partners." (Bernie Dolley (Ikhala Trust) and Rita Thapa (TEWA), Senior Fellows Programme at Cuny University in New York in 2015)

The organisation has forged symbiotic and longstanding relationships with higher education institutions such as the Nelson Mandela University in South Africa (Department of Social Work) and Coady International Institute in Canada and have co-hosted several ABCD seminars and joint action research projects. Ikhala also attends international ABCD festivals and co-hosted the international ABCD Imbizo in Port Elizabeth in 2018.

The Trust further invested in ABCD toolkits, a DVD, case studies and annual ABCD festivals and is nurturing a Community of Practice by training trainers to meet increasing demand for localised ABCD workshops and awareness sessions in communities and from government agencies.
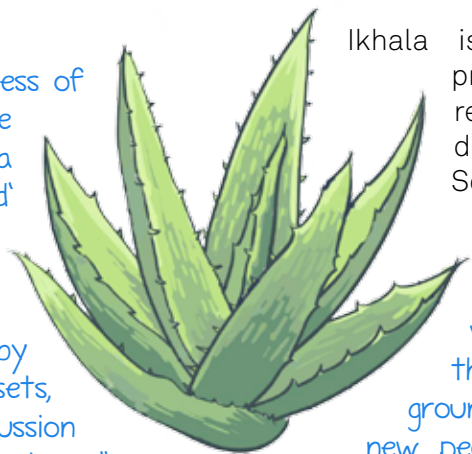
Ikhala is pushing for policy and practice change and, as a result of collective efforts, the development conversation in South Africa is starting to shift.

"Grant-making is one thing, but for us, one of the major values of Ikhala is not just the work that they do on the ground, but opening doors, meeting new people in the space, providing genuine opportunities for networking and exchange, whether it's in South Africa or internationally." (Brianne Peters, Coady International Institute)

"What I found about Ikhala generally, is how catalytic they have been, a very small amount of stimulus or a very small amount of investment has leveraged a huge amount of action. They pick their spots, they're not very big but have an outsized influence of spreading the ABCD approach .If you think about Ikhala's footprint and the ABCD story in South Africa in the last 10 years, Ikhala is right at the centre of it." (Gord Cunningham, Coady International Institute)

"The transformation of organisations such as The Raphael Centre, Port Elizabeth Mental Health and the Nelson Mandela University's Faculty of Health Science and the integration of ABCD into their development work and academic curricula also represent significant examples of the project's impact. Together with Ikhala Trust, these organisations are beginning to develop a body of practice around ABCD approaches and influencing how development can be driven from a more appreciative perspective." (Ikhala Trust External Evaluation 2017, Mutengo Consulting)

"At an advocacy level, it means that we have been able to 'sell' a different approach and there is buy-in, It's early days, but there is a shift in the thinking." (Ncumisa Nongogo, Ikhala Trustee)

Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed – it is the only thing that ever has.
— Margaret Mead —

PORT ELIZABETH MENTAL HEALTH (PEMH)
(Limeez Botha, PEMH Director)

Port Elizabeth Mental Health (PEMH) was initiated in March 1939 in response to the lack of services and facilities for people with psychosocial and intellectual disabilities. They are a registered non-profit organisation that promotes comprehensive, pro-active and enabling mental health services in the Eastern Cape, South Africa.

In 2016, a few PEMH staff (including the Director) attended a training course hosted by Ikhala Trust in Asset Based Community-driven Development (ABCD) and staff resonated strongly with the approach. The organisation had become top-heavy, expensive and stuck in a service delivery model that created dependency. In 2017, the organisation experienced a change in leadership and sudden funding crisis with a 57% cut in state funding. They realized they could not continue 'business-as-usual' and had to change. Ikhala Trust was approached for support. They invited PEMH staff to ABCD training and sponsored a strategic planning workshop to assist the organisation to shape its new direction.

What has happened since then?

There have been tangible shifts in the organisation's identity, approach, culture and programming since PEMH's 'rebirth' in 2017:

- Adopting the term "learning partners" instead of "service users/ clients" and changing the language of the intake form as a 'Welcome Form' which is more asset based.
- An agreed team culture - encouraging appreciative language and helping one another to reframe.
- A poster was designed for each office to remind staff about ABCD principles;
- The residential programme was rebranded as 'Siyaphambili' (going forward) and learning partners make contributions to replenish cleaning materials and consumables.
- Parents have taken more responsibility with regards to homework and after-hour activities for their children and community members are piloting a learning programme in a local garage. Parents have volunteered to spend time assisting with cooking and activities. They also contribute to stationery and school supplies. Unit leaders recruited community members to help with minor maintenance challenges within their specialised playgroups. Two community members with psychology degrees have also volunteered their time to the organisation.
- House parents have attended ABCD workshops and the Youth Centre is assisting group homes to start a vegetable garden. Homes have had sessions on being more water-wise as well as saving electricity, and telephone accounts have decreased.
- Staff are working more positively together and sharing tasks. Operational costs have reduced - telephone, electricity, water, printing, subsistence and everyone is taking responsibility. Reactivity

has reduced through awareness, discipline and a focus on efficiency.

- ABCD sensitisation takes place on a quarterly basis - awareness, training, alignment internally to keep the fires burning.

PE Mental Health is growing positively. Staff are shifting from the conventional 'service provision' model to that of encouraging social networks in the communities - where care givers of children with intellectual disabilities self-organize and provide mutual support. PEMH is gaining recognition locally and provincially as pioneers of mental health innovation and are attracting new partnerships. The change has been exciting, channelling a shift toward wellness, resilience, community-driven development and sustainability. The broad strategic framework is clearer and shifts in attitude have started to shine through.

Yet, PEMH has also realized that 'mind shifting' is not automatic. People easily agree, but putting principles into practice is more challenging. It

is also difficult to shift individual paradigms without a comprehensive understanding. The organisation continues to grapple with how transformation can happen collectively, but is taking significant steps forward.

"Ikhala Trust will always be valued as a partner and mentor in shaping a new identity for our 79-year old organisation. We are so thankful for the investment made into this process that is also inspiring mental health innovation in our sector. While we still acknowledge some gaps exist, there is more clarity and a clearer way forward. We are confident that we are on the right trajectory and ready for this change in both our organisation and the communities we serve." (Limeez Botha, Director, PEMH)

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LEGALWISE

(Lesley Haynes, Manager: Employee and Community Engagement)

LegalWise is a company that aims to grant South Africans equal, fair and affordable access to justice and legal assistance. It gives people the opportunity to access a lawyer and claim basic rights and entitlements according to the law. LegalWise plays a significant role in the social and economic development of South Africa through its services and by investing in community development through corporate social responsibility. LegalWise is an on

granting and learning partner of Ikhala Trust. The relationship is unique and has deepened over time - built on trust, openness and willingness to support what is organically emerging.

In May 2012, the CSI team attended ABCD training at the Ikhala Trust. During the course, they deliberated for hours over the traditional approach to development, which they had been following for many years. They had an epiphany moment, when they realised that despite all their good intentions, they had more than likely been contributing towards poverty and inequality

instead of working to alleviating it! This was the turning point for them – and fundamentally changed the way they saw communities and the type of questions they asked.

After attending an ABCD Training of Trainers course at GIBS later in 2012, they decided it was time to put their learning into practice. So, in February 2013, off they went to Bergville, KZN fully equipped with a deeply entrenched set of ABCD principles and determined to do Corporate Social Investment (CSI) differently. Their first attempt was a complete disaster!

They met a group of women that had been selling baked goods in town for years and tried to change the way they operated to increase their profits and hopefully their lives and that of their families. After all, they were building on what they were already doing – right? After setting up a fully equipped bakery and providing additional training, the ladies struggled to maintain the new responsibilities and one by one, went back to what they were doing before. What they failed to realise is - if something is working, leave it alone! Their next attempt at practically applying ABCD taught them some invaluable lessons. This time they partnered with the Woodford community in Bergville to build a library at a local high school. They agreed to pay for the building materials which were locally sourced and the community agreed to provide the labour. They witnessed the power of local agency, and also the forces that work against social cohesion. It took almost two long years to complete the project, but they could never have imagined the outcomes of this initiative, which were so much more than just a library. It has become the centre of the community where reading is encouraged, community meetings take place as well as

drama lessons, computer lessons and even driving lessons. It is owned by the Woodford residents because the community was always kept at the centre of the project.

We could not claim this about any other CSI project that we had done in the past and we knew for sure that ABCD had a profound effect on the way community development unfolds. We told the story of our experience of applying ABCD many times on many different platforms, both locally and internationally and participated in different forums. If there was something happening in the ABCD space, we were there. We started to change the way we funded development by providing unrestricted funding and partnered with like-minded non-profit organisations. We became known as ABCD Practitioners that operated on the 'edge', in other words, willing to take the risk of facilitating development differently.

Through ABCD, we are able to uncover and learn about the real issues that people are dealing with and not what we perceive these to be. It makes our work more real and allows us to have conversations on much deeper levels. The traditional needs-based approach to CSI is de-motivating for both business and community members. Focusing on possibilities instead of problems reveals opportunities for community development that could otherwise not be realised. (Lesley Haynes, Manager: Employee and Community Engagement)

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3. The Flowers

"We really are a learning organisation – we expose ourselves to many things so that we can improve our thinking and doing. We try to stay ahead." (Chris Engelbrecht, Trustee)

Reflection, learning and knowledge creation is part of the culture of Ikhala Trust and the organisation has always been actively involved in learning networks. For example, a few years ago Ikhala initiated a Leadership Learning Space for grant-makers including its own donors as an opportunity to learn from practice and share in an open and honest environment. Ikhala also hosted a donor conference in Port Elizabeth to get donors to engage each other.

Board meetings are opportunities to review, to realign and adjust what is not working. It has also been important to gather evidence, in the form of data, research and documentation to strengthen Ikhala's work and advocacy efforts, as well as create and maintain institutional knowledge across the dispersed team of board, staff, associates, assessors as well as other ABCD practitioners.

"We need to know … is it really making a difference in people's lives? Is it helping people?" (Nosimilo Filita, Ikhala Office Administrator 2006 – 2016, cited in The Project People, 2006)

Being able to demonstrate the impact and effect of the work has become increasingly important yet challenging at the same time. There is more pressure from stakeholders for substantiated, data-based evidence of change. Many partners on whom Ikhala relies for data collection struggle to consistently and coherently provide information in a usable format. Satisfying stakeholder requirements can bring tension and contradictions into the work which are not easy to manage.

Community partners interviewed in a 2017 external evaluation expressed how Ikhala Trust positively impacted their organisations. There are tangible effects of financial support enabling activities such as transporting sick people to hospital, hosting meetings or improving infrastructure.

Respondents also expressed how Ikhala "breathes life" into organisations and empowers the individuals driving them. Support from Ikhala's staff boosts motivation, hope and confidence. Performance of projects and staff improved and people believe they have a much better chance of success with Ikhala on board.

At a practical level, Ikhala assists projects with their NPO registration, thus making it possible for them to raise funds from other sources. Ikhala also provides practical guidance to projects ranging from setting up filing and record-keeping systems, to developing clear and measurable objectives and improving accountability through better monitoring and reporting. These elements when combined, build the potential of organisations to thrive.

"We would love to extend our sincere and heartfelt gratitude to you (Ikhala Trust) and your staff for the way in which you took us under your wing and nurtured us. You went outside and beyond your scope, not knowing us and took the financial risk to assist us. You brought us light at the right time. You made a point of mentoring us, showing us the ropes and giving us guidance in managing our co-operative. The workshops, financial support and assisting us when conflict arose ,will always be treasured and remembered." (Masenge Manufacturing Co-op)

Community partners highlighted that the OD and project management training, and various tailored organisational interventions have helped them understand how to run an organisation more effectively, for example, learning how to keep financial records, write reports, plan activities and mobilise community contributions. CBO members also mentioned the effect that reviewing community services and activities had on improving management and leadership skills.

Partners mentioned the significance of ABCD training provided by Ikhala in shifting people's attitudes and perceptions about themselves and their communities.

In conjunction with capacity building interventions, small grants have provided access to funds to cover running costs, such as internet connection, transport, administrative charges, airtime, stationery, and refreshments for community meetings. Covering these costs has given community partners a much-needed reprieve from every-day stressors, helped them to establish themselves and further develop their services.

"People are taking their own initiative and meeting together on their own – we are finding ways to work together." (Community partner 4).

"We didn't appreciate our resources before or give a monetary value to the time we spend in our organisations. Now we look for our own assets and look at what we can contribute before we ask for help. It has built up my confidence, I feel I have something to offer." (Community partner 5).

We wanted to focus more on self–sustainability and to be independent, but we didn't know how. Everything we have done with Ikhala has had a profound effect on the organisation and me as a person." (Community partner 2).

(extracted from: Ikhala Trust External Evaluation 2017, Mutengo Consulting)

Community partners noted that better understanding of themselves and the space they work in helped them to engage with donors with more honesty, integrity and self-confidence. Through attending events organised by Ikhala Trust, such as the annual ABCD Festival or external workshops, community partners have been able to raise their voice and profile and have made useful connections with organisations outside their normal spheres. Various community partners emphasised the power of networks and connections made.

"We had never had an external donor and were surprised when we were offered a grant from Ikhala Trust to support our activities. We struggled with Monthly Reports and initially found them tiresome to do. But it paid off in the end as we were able to collate our information in such a way that we were able to attract a donor and received more money than we had asked for. We have now learnt the importance of regular data capturing and more importantly regular reporting. The Kouga2gether network was birthed, and the group has grown from around 15 people at the first session to 67 people who have now joined the network. Not all the people have been exposed to ABCD but the fact that they have a vibrant and growing network in Jeffreys Bay is significant." (JBay Recycling)

4. Challenges and Stumbling Blocks

Ikhala has confronted many challenges typical to grantmaking - issues such as dependency forming with grantees, conflict amongst project members, issues of accountable reporting and destructive community dynamics. Other typical challenges have been late or non-reporting on the part of grantees or insufficient information being provided about project activities requiring exhaustive follow up.

Many community organisations are run by volunteers and funding sometimes shifts expectations and provokes internal conflict where voluntary staff seek to be paid. For example, Othandweni Home Based Care was once a thriving organisation, who were able to unlock funding from other donors. In recent years through engagement with the IDT (Independent Development Trust) Expanded Public Works Programme, they were able to employ 80 people for a 3-year period. When funding dried up, all but 4 people remained and this devastated the organisation. The core group has been resilient and are re-establishing networks to broaden their programme activities.

They are changing the name of the organisation to be a Health Centre and started a small piggery to generate income.

The macro environment is also challenging. Food security and agricultural activities have been hampered by severe water shortages and extreme weather. Unemployment and poverty are increasing and development in the country remains uneven. South African unemployment figures in 2019 stands at 29% of the population (www.tradingeconomics.com). Communities are becoming increasingly frustrated at the failure of government to provide basic services at the local level. This pressure is often transferred to grassroots organisations who do not have the necessary resources and capacity to substitute, and this can create tensions within their own organisations.

Working in a responsive and flexible way can also sometimes backfire where grantees become too familiar and cross professional boundaries. Though very few, there have been instances of grant mismanagement.

Authentic relationships can be difficult to maintain. Too much informality can blur boundaries and sometimes people take advantage. A key generalisation is that people have a habit of shifting blame, especially if mistakes occurred, fearing a donor backlash. Some leaders are not honest enough to admit their mistake and resist change. Founder members often tend to be project leaders and may claim the project as their own. Many conflict situations Ikhala Trust has dealt with has been around the leader and questioning their authenticity.

5. Important Lessons

Ikhala Trust continues to develop and refine its primary activities of supporting community-based organisations (CBOs), especially in remote regions of the Province by affirming community assets, and building resilience and capabilities. It is a journey of accompaniment that appreciates natural strengths, ideas, aspirations and opportunities that organically emerge. However, it has become increasingly essential that Ikhala finds ways to influence the development sector to push for change and show evidence of a paradigm shift, as well as demonstrate impact in the context of its work. Social justice is an ambitious goal. Change can be subtle (though profound) and take time. Having constellations of relationships with grantees, networking and learning partners creates a golden thread that supports and guides the organisation as it moves forward. There are other important grantmaking lessons Ikhala can share:

- Working with community-based organisations requires patience, tolerance, empathy, energy and creativity on the part of the external agencies.
- Organisations are diverse, and we cannot make assumptions that what works for one will work for all, so we continuously have to expand our tool box and innovate.
- Spending time building a relationship of trust and understanding with grantees is important, to ensure mutual accountability – trust is a major aspect of this process.
- Projects must be visited so one gets a better sense of what is happening in the organisation and the community. Reports do not reveal the full picture.
- Big is not always better – small changes have profound ripple effects.
- Organisations have learnt to talk about problems as they feel this is what will get them funding. They often don't share the many successes they achieve on the ground for fear of losing support. Donors can counter this by shifting the conversation to affirm strengths and achievements.
- Not everything will happen at the pace we want it to happen – it is only when we open ourselves up to learn, that we grow;
- Organisations like people, can suffer from 'over-eating' and grant size must be appropriate. Smaller investments can reap more benefits in the longer term.
- The work that we do is challenging but if you have the right mix of people surrounding you and who are prepared to share their gifts, talents, expertise and skills, you can succeed.
- We don't really waste too much energy worrying about what did not work, but exalt those precious moments when things (sometimes unplanned) yield wonderful results. This is what we focus our energies on.

6. The Monday Morning Question

We are still on a journey of discovery which remains exciting, challenging, daunting but always full of hope and promise...

Ikhala has critically reflected on itself, its positioning and relevance in the grantmaking sector. It has raised heated questions in meetings and workshops, and has pondered on these deeply and honestly. These 'Monday Morning questions', have sometimes kept leadership awake at night and we will ask many more as we continue our journey.

- Are we alive, vibrant, demand–driven, responsive?
- Whose agenda are we promoting?
- How do we promote citizen-driven development?
- To what extent do we 'listen'– how do we take lessons we learn and incorporate these into our practice?
- How well do we understand community?
- How do we nurture the assets of young leaders (creativity, energy)?

- To what extent are community partners involved in informing the planning, monitoring, evaluation and reporting systems we have developed? Is there space for them to influence?
- Did we lose our connection to the burning issues? Are we too comfortable, complacent and traditional?
- How can our partnerships be more equal and collaborative?

7. Closing Comment...

From the preceding pages, we can see that Ikhala's journey is far from over. As a learning organization, it recognizes some significant success in terms of inspiring confidence, taking risks, helping people to recognise strengths and assets, building capacity and linking community organizations to a broader network of allies and donors.

Yet, it continues to challenge itself. Casting itself as a responsive investor, it still wonders whether it has done enough to listen rather than talk, nudge rather than push, nurture rather than squash local initiative. Working on the ground at the grassroots level, it is often hard to see the long-term trend when there are so many ups and downs along the way. Nevertheless, the stories of "power within" at the individual level, as well as "power with" and "power to" at the local community level, are indicators of an attitudinal shift. Equally impressive is the influence of Ikhala on potential allies and partners in the NGO, donor, corporate, academic, and local government sectors. Their power to act as a reinforcement of power building means a recharged civil society is in the making.

"Dare to dream of positive change"

(Ikhala Trust Annual Report, 2010 – 2011)

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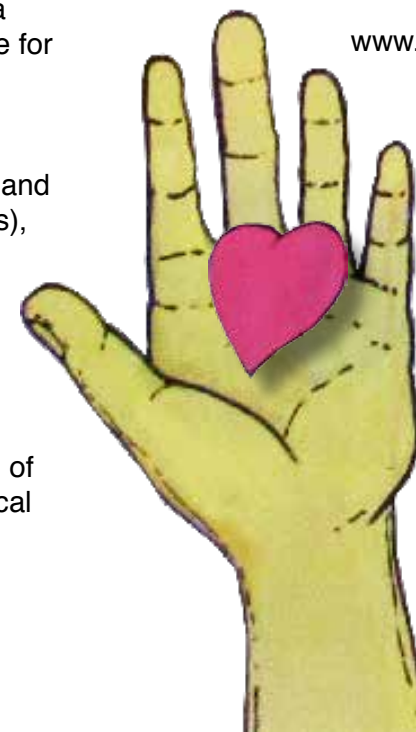
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KCDC Fbook: Kwenzekile Community Development Centre

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