

Family Giving Traditions in East Africa

Impact. Sustainability. Legacy. Succession



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EXECUTIVE SUMMARY

The East Africa Philanthropy Network (EAPN) embarked on this research project “**Family Giving Traditions in East Africa**”, to document the impact of family giving in Kenya, Uganda, Rwanda, Tanzania, and Ethiopia. The study focuses on sustainability, succession, and legacy within family foundations. This report provides a comprehensive coverage of the intricacies of family giving in the region, fostering informed philanthropy, and contributing to national and regional development.

Through a qualitative study involving key informant interviews in Kenya, Tanzania, Ethiopia, and Uganda, the research explored the diverse traditions and practices within family philanthropy. The data was collected through 18 in-depth interviews (Ethiopia 4, Uganda 5, Tanzania 4, Kenya 5). The analysis was conducted using thematic analysis to identify common patterns and insights into sustainability, succession planning, and value transmission.

Findings reveal that family giving in East Africa is deeply embedded in the region’s cultures with high emphasis on **family legacy, addressing societal challenges, and safeguarding/sustaining core family values.**

Sustainability emerged as a central theme, with family foundations employing various strategies such as self-financing, external support, and diversification of funding sources.

Interviewees highlighted the importance of having clear succession plans, responsible resource management, and environmental considerations as key elements of their long-term sustainability efforts.

Generational transitions were another priority for many families, who stressed the importance of ensuring a smooth transfer of leadership and values across generations.

Thematic analysis revealed that foundations often involved boards in succession planning, placed emphasis on education, and encouraged collaborative decision-making to facilitate these transitions. The desire to leave a lasting, intergenerational impact was also evident in the discussions.

Family foundations expressed a strong commitment to cultivating philanthropic identities and legacies that reflect their values. This included addressing societal challenges in ways that promote innovation, inclusivity, and sustainability.

Despite these efforts, the study identified several challenges, including over-reliance on founders, limited domestic philanthropy, governance challenges, youth unemployment, and resource constraints. Nonetheless, the interviews revealed significant opportunities for family foundations to enhance their impact.

The emphasis on a need for greater collaboration and partnerships was highlighted as a key to overcoming these obstacles. Key avenues for growth suggested including forming strategic partnerships, empowering local communities, and leveraging technology. By seizing these opportunities, family giving traditions in East Africa can evolve and create a more meaningful and sustainable societal impact.

PREFACE

This report provides a comprehensive coverage of the intricacies of family giving in the region, fostering informed philanthropy, and contributing to national and regional development. The study explores family giving traditions in East Africa, focusing on their essence and impact. It examines how organisations measure success and impact, revealing the methods used to evaluate their interventions. The research investigates sustainability strategies, highlighting internal practices by staff and the board to ensure organisational effectiveness, especially during challenges like the COVID-19 pandemic. It also investigates succession planning, focusing on ensuring smooth transitions and continuity beyond the founders. The study discusses the desired legacy of organisations, emphasising values such as love, counselling, and integrity, with goals for broader impact. It identifies challenges and misconceptions in family giving, categorising them into clear themes. Emerging trends and opportunities are also explored, noting potential areas for growth.

The conclusion provides an overview of the key findings, summarising the essence, impact, challenges, opportunities, and trends in family giving in East Africa. We would like to acknowledge the input received from 18 key respondents in East Africa. We would also like to acknowledge the technical support received from researchers in the sector including Maurice Omondi from Tangaza University, and peer review by Dr. MaqC Eric Gitau and Awuor Ayiecho, from Development Dynamics. We also acknowledge the technical support received from Prof. Bheki Moyo of Wits Centre of African Philanthropy. The EAPN staff also played a key role in executing this study led by Purity Mumo.

We hope that the insights captured in this study will contribute to the discourse about philanthropy in Africa in general, and Family Philanthropy in particular.

CHAPTER ONE:

BACKGROUND AND CONTEXT

1.1. Introduction

There are myriad definitions of ‘philanthropy’ and its sub-set, ‘giving.’¹ The word “philanthropy” has its roots in the Greek language, from the words “*philos*” meaning “love” and “*anthropos*” meaning “man” or “humanity;”. Together, these words are from the ancient Greek phrase *philanthropia*, meaning “to love people” or “love of humanity”. The concept of philanthropy includes the act of voluntary giving by individuals or groups to promote the common good. It also refers to the formal practice of grant making by foundations to nonprofit organisations.²

In this study philanthropy and giving are used interchangeably and in context, therefore family giving is the act of giving by the smallest unit, the family.

Philanthropy has contextual and regional variations. The Indiana University Lilly Family School of Philanthropy (IUPIU)³ has given a dichotomy on philanthropy and giving that includes:

	Giving time (i.e., giving your energy and physical presence through volunteering),
	Giving treasure (i.e., making financial contributions)
	Giving talent (i.e., lending your skills, talents, or expertise)
	Giving ties (i.e., making connections across your personal and/or professional networks) and Giving testimony (i.e., advocacy; honouring lived experiences and bearing witness to stories).

In this context, philanthropy has been described as—the private giving of time and valuable resources for public good.⁴ (Barman, 2017). The common understanding of the term “philanthropy”— often unknowingly dismisses the full spectrum of giving.

The usual way in which individuals are primed to think about philanthropy is from an institutional perspective or a model where one person (traditionally a high-net-worth individual) gives money to various causes. many people.

Although the meaning of the word has its roots in the Greek language, from the words “*philos*” meaning “love” and “*anthropos*” meaning “man” or “humanity;” the role of wealth and ability to donate large sums of money often supersedes the meaning, “love of humanity.”⁵

¹ Marty Sulek, (2009) On the Modern Meaning of Philanthropy in *Nonprofit and Voluntary Sector Quarterly* 38(6) doi. 10.1177/0899764009333052

² See Philanthropy New York, <https://philanthropynewyork.org/sites/default/files/resources/History%20of%20Philanthropy.pdf>

³ Indiana University Lilly Family School of Philanthropy at IUPIU (2023). *What Americans Think About Philanthropy and Nonprofits*,

⁴ Barman, E. (2017). The social bases of philanthropy. *Annual Review of Sociology*, 43, pp. 271-290. <https://doi.org/10.1146/annurev-soc-060116-053524>

⁵ Muhammad Hawwa (2021). *Five Facts to Know About Black Philanthropy*

Family philanthropy lacks a standardised definition in research literature, as does the term “family foundation,”. In practice, family foundation typically connotes the active involvement of donors or members of the donors’ family in the foundation, but assessing this involvement becomes challenging over time, particularly as founders pass away, and descendants display varying levels of engagement⁶.

Family philanthropy is the act of giving collectively as a family, leveraging shared values to amplify the impact of philanthropy on both the supported causes and the involved family members.⁷

For this paper we will define family philanthropy, also known as family giving, as donation of time, money and skills towards a cause that is beneficial to society conducted by a group of persons related by marriage, blood, or adoption. Family philanthropy harnesses shared values as a driver for efforts towards creating lasting social impact characterised by its adaptability and responsiveness to both family dynamics and community needs. According to Tedesco and Moody (2022)⁸

Family philanthropy involves a collective commitment to societal change driven by the shared legacy values and goals of the family members. Families can engage in philanthropy through various structures, such as donor-advised funds (Fidelity Charitable, n.d.)⁹, family foundations (Council on Foundations, n.d.)¹⁰, and giving circles (Eikenberry, 2008)¹¹.

These structures provide flexibility to align their giving with their specific goals and the needs of their communities. By adhering to key principles like accountability, equity, and lifelong ongoing learning, families can ensure that their philanthropic efforts are both impactful, meaningful, and sustainable. This approach not only enhances the impact of philanthropic efforts but also strengthens the bonds within the family, promoting a culture of giving and social responsibility across generations.

Family giving is deeply rooted in culture, with a strong emphasis on creating a legacy. In the United States, family giving Notable philanthropic families like the Rockefellers and the Gates have set precedents for large-scale, impactful giving with a focus on education, healthcare, and societal well-being (Payne & Birkholz, 2018). The American tradition of family philanthropy often involves establishing foundations or trusts that outlive the donors, ensuring a continued impact for generations (Burlingame, 2006).¹²

In India, philanthropy is also rooted in religious traditions such as the practice of ‘daan’ (charitable giving) in Hinduism. Family giving in India frequently aligns with aspirations for social development, education, and poverty alleviation (Bhagat, 2019)¹³. Notable examples include the Tata family, known for their contributions to education and healthcare through the Tata Trusts (Kanekar, 2017)¹⁴.

⁶ <https://www.ncfp.org/topics/what-is-family-philanthropy/>

⁷ <https://www.nptuk.org/family-philanthropy-creating-a-lasting-giving-tradition/>

⁸ Tedesco, N., & Moody, M. (2022). The Future of Family Philanthropy. *Stanford Social Innovation Review*. <https://doi.org/10.48558/E419-FN16>

⁹ Fidelity Charitable. (n.d.). Frequently asked questions. Retrieved from <https://www.fidelitycharitable.org/faqs.html>

¹⁰ Council on Foundations. (n.d.). Family foundations. Retrieved from <https://cof.org/foundation-type/family-foundations>

¹¹ Eikenberry, A. M. (2008). Fundraising in the new philanthropy environment: The benefits and challenges of working with giving circles. *Nonprofit Management and Leadership*, 19(2), 141-152. <https://doi.org/10.1002/nml.212>

¹² Burlingame, D. F. (2006). American philanthropy. The role of national philanthropic trusts in sustaining ‘community benefit.’ *Voluntary Action History Society*.

¹³ Bhagat, R. B. (2019). *Giving with a Difference. Philanthropy in India*. Springer.

¹⁴ Kanekar, A. (2017). The Making of a Legacy. *The Tata Way of Giving*. *India Development Review*. <https://idronline.org/the-making-of-a-legacy-the-tata-way-of-giving/>

Legacy and aspirations play a pivotal role in shaping philanthropic endeavours worldwide. In the context of family giving, individuals and families often view their contributions as a means to create long lasting, cross-generational positive change. For this reason, succession planning is a key component of family philanthropy. It contributes to a seamless leadership transition, ensuring the continuity of a family's giving heritage (Gersick et al., 2006)¹⁵.

A well-thought-out succession plan provides the opportunity to engage the next generation, tapping into their fresh perspectives, innovative ideas, and renewed energy (Lansberg, 1988). This intergenerational collaboration fosters a sense of shared purpose, a strong commitment to philanthropic values, and an investment in the future (Handler & Kram, 1988).

While there are commonalities in the aspirations for positive change and legacy-building, differences arise due to unique historical, cultural, and economic contexts. Understanding these distinctions is crucial for effective philanthropic strategies that resonate with the values and needs of each community.

1.2. Global Perspectives in Family Philanthropy

According to Ellen Remmer's, "Is Family Philanthropy Worth the Effort¹⁶?" published on April 20, 2023, family philanthropy, despite its challenges, offers significant benefits. Remmer argues that it contributes to strengthened familial bonds, the creation of a legacy, and an enhanced understanding of the world.

Remmer asserts that family philanthropy strengthens familial bonds, providing a noble and higher purpose for collective efforts. It also enables families to create and define a legacy, answering essential questions about values and purpose across generations.

Additionally, family engagement in philanthropy broadens horizons, connects family members to the global community, and contributes to personal development.

In the United States, family philanthropy has reached an advanced stage, evident through the establishment of dedicated organisations promoting and facilitating this form of giving. Notably, the National Centre for Family Philanthropy (NCFP)¹⁷, founded in 1997, exemplifies this commitment. As a nonprofit organisation, the NCFP plays a crucial role in encouraging and sustaining philanthropic missions within families nationwide. NCFP assists families in aligning their personal motivations, values, and relationships to make their philanthropy more effective and meaningful.

**Notably, the National
Centre for Family
Philanthropy (NCFP)¹⁷,
founded in**

1997

The Council on Foundations, in collaboration with BNY Mellon and Give2Asia, has released a report titled "Global Family Philanthropy. Exploring key considerations for Giving Across Borders."¹⁸

This paper explores the opportunities and challenges faced by global families engaged in cross-border philanthropy. It recognizes the complexities involved, from coordinating family strategies

¹⁵Gersick, K. E., Davis, J. A., Hampton, M. M., & Lansberg, I. (2006). Generation to generation. Life cycles of the family business. Harvard Business Press.

¹⁶<https://tqi.org/is-family-philanthropy-worth-the-effort/>

¹⁷ <https://philanthropynewsdigest.org/features/nonprofit-spotlight/national-center-for-family-philanthropy>

¹⁸<https://cof.org/content/global-family-philanthropy-exploring-key-considerations-giving-across-borders>

to navigating intricate tax regimes, and emphasises that global family philanthropy, once a rarity, is increasingly common due to generational shifts and technological advancements. A collaborative project titled “Global Family Philanthropy. Exploring Key Considerations for Giving Across Borders¹⁹” authored by Joan K. Crain, Brian Kastner, Natalie Ross, and Birger Stamperdahl, represents the landscape of global family philanthropy, addressing motivations, options, regulatory challenges, and the future of cross-border giving.

The guide provides practical insights into the evolving dynamics of global philanthropy, serving as a valuable resource for families navigating the complexities of cross-border giving.

1.3. Philanthropy in Africa

Philanthropy has a deep history in Africa. From individual to institutional philanthropy, community fundraising to religious tithing, philanthropy occupies a key place across the continent. However, this history of philanthropic activity has often not been documented in formal settings. There is also limited academic literature on African philanthropy.

While some existing literature derives from scholars, much of it is from philanthropic organisations, international development organisations, and conferences (conference papers) on the topic outside the continent looking in.²⁰

Although an exact translation for “philanthropy” does not exist in most indigenous African languages, the concept of love for humanity certainly does, but in a culturally distinctive way. Giving and helping are considered basic components of responsible social behaviour manifested across society’s various institutions.

For this reason and arguably so, ‘African philanthropy’ as opposed to ‘philanthropy in Africa’ remains seriously under-researched and often prejudicially understood as ‘traditional’, anti-modern and under-appreciated as an agent for the continent’s development.

This situation is further aggravated by subordination of Africans’ philanthropy to external vocabularies and meanings. In addition to not taking sufficient account of the continent’s history, this conditioning overshadows a full appreciation of how philanthropy operates beyond the elevation of individual giving back by ‘elites’ (Trust Africa, 2014).

African culture has its own take on the tradition of gift-giving. In Africa, gifts are not limited to special occasions like birthdays or weddings. Africans are known for the elaborate artwork and beautiful details that adorn the artefacts from their respective cultures.

As a result, it comes as no surprise that their gift-giving culture is quite elaborate as well. Today, many African countries have adopted the traditions of gift giving, and it has become a key component of relationships in all African societies. It is more than just a small token of appreciation.

It is a practice, a way of identity and an element of culture. It could also be a symbol of the warmth and friendship you share with someone, or their willingness to put peoples needs above their own. Gift giving in African cultures is meant to be an expression of love, respect, and appreciation. It is also believed to bring good luck and ward off evil spirits.²¹

¹⁹ <https://cof.org/sites/default/files/documents/files/Global-Family-Philanthropy.pdf>

²⁰ African GrantMakers (2013). Sizing the field. frameworks for a new narrative of African Philanthropy

²¹ Africa Gifting Culture, posted in Linked in

A more interesting categorization has been that of 'vertical or horizontal' philanthropy. The former, also known as philanthropy for the community, refers to giving by the few High Net Worth Individuals (HNWIs) or those who are rich, to the poor. This kind of philanthropy is organised through **private foundations, trusts, corporates, family trusts, community chests and community foundations** from the West (Moyo, 2011; Fowler 2016²²; Julien, 2018²³).

Horizontal philanthropy (philanthropy of community) on the other hand is built on reciprocity, solidarity, and cooperation (Maposa, 2009)²⁴. People in the community organise to give to other poor people. Examples are burials, community saving groups, cooperatives, and communal farming activities²⁵ (Moyo, 2011).

There are therefore many forms of philanthropy across Africa. All are aimed at solving the societal challenges of the day that include high levels of inequality, poverty and the need for decent jobs. In Africa, the notions of "giving," "sharing," "kindness," "solidarity" and "charity" are sometimes preferred to the term "philanthropy." However, the reality is that none of these words captures the richness of the phenomenon (Moyo, 2019).

According to the CAF World Giving Index 2018 published by the Charities Aid Foundation, Africa is ranked second globally for helping a stranger. This not only concerns donating money, but also volunteering time, goods, and services. A practical definition of philanthropy in Africa should therefore include a broad range of actions ranging from simple acts of charity to acts that improve living conditions, conducted at community level, and actions towards the public good, carried out by not-for-profit and private sector organisations.²⁶

1.4. Family Giving in Africa

Africa is experiencing a philanthropic renaissance driven by individuals committed to improving the continent's well-being²⁷. It is estimated that over US\$7 billion is given by philanthropists in Africa every year. Africa's great givers not only consist of businesspeople, artists, professional athletes and celebrities, there are also many philanthropists who only give anonymously. This could be for personal or spiritual reasons, or simply because they are humble and prefer not to have the limelight on them.

These philanthropists are playing a pivotal role in enhancing the quality of life for Africans. Between 2000 and 2013, there was an increase of 15% in the number of wealthy individuals, paving the way for a strategic and sophisticated culture of formalised philanthropy, addressing critical sectors like health, education, and disaster relief.

Africa has long and deep traditions of solidarity and giving. However, philanthropy has evolved, and the world is witnessing the emergence of large-

Between
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and
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15%
in the number of wealthy individuals, paving the way for a strategic and sophisticated culture of formalised philanthropy, addressing critical sectors like health, education, and disaster relief.

²²Fowler, A. (2016). Chair in African Philanthropy-Foundational Paper for Teaching Research and Outreach

²³Julien, L-A (2018). African Philanthropy at the Policy Table, Africa Portal, at <https://www.africaportal.org/features/philanthropy-policy-table/> (Accessed 6 Aug 2020).

²⁴Wilkinson-Maposa, S. (ed) (2009) The Poor Philanthropist 111: A Practice-relevant Guide for Community Philanthropy. Southern Africa-United States Centre for Leadership and Public Values, Graduate School of Business, University of Cape Town, South Africa

²⁵Moyo B (2011). Transformative Innovations in African Philanthropy, The Bellagio Initiative

²⁶MEAE (2021) Philanthropy and development. Stocktake and partnership strategy.

²⁷<https://www.philanthropistsinafrica.com/philanthropists-in-africa/>

scale organised philanthropy in different forms. Despite the progress being made by African philanthropy in contributing to poverty reduction and development, the reach and recognition of this philanthropic support remains limited.²⁸

With economic development comes new wealth and a growing African middle class. Consequently, philanthropy is becoming more formalised, but the legal, legislative and tax framework to support foundations, grant-makers and giving have not kept pace with these developments. In fact, in many countries, policies and laws affecting civil society have become more restrictive and unfriendly. Barriers to fundraising, association or freedom of expression can be found in many instances on the continent, restricting the activities of civil society and impacting negatively on philanthropic initiatives.

While foundations in Africa are contributing to positive a momentum in African philanthropy .²⁹ The continent continues to grapple with a myriad of challenges that necessitate sustained attention and strategic interventions. Despite the increasing recognition of philanthropic efforts, critical issues such as poverty, healthcare disparities, and educational shortcomings persist in various regions. As a result, there is an emergence of philanthropic foundations in Africa that are strategically engaged in activities while maintaining independence from governmental structures. The collaborative spirit adopted by these foundations and governments, are collectively developing principles that shape social and economic reformation on the continent.

African philanthropists such as Tony Elumelu are revolutionising family giving in Africa with innovative strategies, Ighobor (2013)³⁰. Unlike traditional charitable contributions, they are investing in projects promoting Africa's prosperity, responding to initiatives like President Obama's Power Africa program. Key philanthropists, including Aliko Dangote and Mo Ibrahim, are shifting towards strategic philanthropy, linking business with charity. Cultural values like ubuntu underpin philanthropy in Africa, challenging the perception of limited formal institutions. These philanthropists are poised to shape Africa's philanthropic landscape and contribute to lasting change. Initiatives like the African Philanthropy Forum aim to promote collaboration, addressing concerns through peer-review components.

²⁸ African Grant Makers Network (2013). *Growing African Philanthropy. What's New, What's Now, What's Next?*

²⁹<https://www.philanthropistsinafrica.com/foundations-in-africa/>

³⁰ Ighobor, K. (2013, December). African philanthropists push for prosperity. *Africa Renewal*. [<https://www.un.org/africarenewal/magazine/december-2013/giving-back-society>]

CHAPTER TWO:

LITERATURE REVIEW

2.1 Comparing Giving traditions across African countries

Despite the availability of a wide range of literature on what can be construed as philanthropic behaviour in Africa, there is limited conceptual discussion on what constitutes philanthropy in African context(s). However, philanthropic behaviour is a culturally rooted phenomenon manifesting in diverse forms, expressions, and models.³¹

Half of the world's fastest growing economies are African,³² and the number of wealthy Africans is also growing. There were 177,000 individuals worth \$1 million or more on the continent in 2018, up from 164,000 in 2013—and that number is projected to reach over 200,000 by 2023.³ Forbes⁴ identifies 20 African billionaires, of whom 12 are from sub-Saharan Africa.³³

The last 30 years have seen the emergence of more formal philanthropy in Africa.³⁴ Some of Africa's high-net-worth individuals are engaging in large, structured giving, often through organised vehicles, such as institutional foundations.³⁵

In East Africa, domestic philanthropy is scaling up because of the continued social cohesion among communities, growing wealth among the middle-income households and High-Net-worth Individuals within the region.³⁶

Philanthropy is a powerful expression of uplifting solidarity. Simply put, it is at the core of the ties that bind one of the most diverse human populations on the planet. Over the past ten to fifteen years, there has been a phenomenal growth in philanthropic institutions across Africa, and the informal traditions of individual giving have not diminished.

Hence, the vehicle is not broken and neither has it slowed down - if anything, it has gathered speed in the right direction - and that is precisely the reason we must give it greater and more careful attention.

We need to know more and understand better what fuels it, how its component parts fit together, why it runs the way it does, and what else it needs to continue to run on its own steam.³⁷

Many Africans however do not use the term 'philanthropy,' which is often associated with the countries of the Global North and with transfers of money from rich to poor. In many instances, English terms such as 'giving' or 'charity' are used instead, and a wide range of other terms in African languages such as '*ubuntu*.' This giving includes, but is not limited to monetary resources;

³¹ Mati, J. M. (2017). Philanthropy in Contemporary Africa. A Review. *Voluntaristics Review*, 1(6), 1-100. <https://doi.org/10.1163/24054933-12340014>

³²Yinka Adegoke, Quartz Africa, January 13, 2019, <https://qz.com/africa/1522126/african-economies-to-watch-in2019-and-looming-debt>.

³³Ian Schwier, Craig Wallington, Maddie Holland, and Wendy Magoronga (2020) *The Landscape of Large-Scale Giving by African Philanthropists*

³⁴"The Annual Review of South African Philanthropy 2019," Independent Philanthropy Association South Africa (IPASA), <http://ipa-sa.org.za/download/annual-review-of-south-african-philanthropy/>.

³⁵The Africa Funding Landscape. A Profile of Funders Focused on Africa and Perspectives on the Field, Africa Grantmakers Affinity Group (AGAG), 2019, <https://www.africagrantmakers.org/the-africa-funding-landscape>.

³⁶ East Africa Philanthropy Network (EAPN) (2021) *The State of Institutional Philanthropy in East Africa - 2021*

³⁷Trust Africa (2014). *Africa's Wealthy Give Back. A perspective on philanthropic giving by wealthy Africans in sub-Saharan Africa, with a focus on Kenya, Nigeria and South Africa*, UBS.

time, expertise, skills, and other mechanisms embedded in systems of mutuality and reciprocity have significant weight.

Philanthropy in this study is therefore defined as the basic act of giving. The reality is that community foundations are also rooted in ancient African traditions encapsulated in concepts like ubuntu (meaning “I am what I am because of who we all are”), *harambee* (Kenyan form of community fundraising meaning “all pulling together”); *ilima* (Southern African practice of sharing with those who have not), or *isusu* in South Africa, looked at the many ways that poor people support each other.³⁸

Many African communities are replete with terminologies that connote giving or depict giving. Terms such as *rubatsiro* in Shona and *ncendo* (*uncendo*) in Ndebele; terms such as *ubudehe*, a Rwandan practice of collective action and mutual support, or terms such as *undugu* (brotherhood) and *ujamaa* as used in Tanzania, *Harambee* in Kenya or Peer-to-peer rotating savings, credit, insurance and/or investment systems are known by a variety of names from *chamas* (Kenya), *merry go rounds* (Kenya), *ukub* (Eritrea), and *ayyuto/hagbad* (Somalia).³⁹

The growth and development of giving in Africa is explainable in part by the fact many African philanthropists grow up surrounded by the challenges they then seek to solve, leading to a strong personal connection to an issue.

For many, giving has always been a family trait and is linked to their religious values. An ‘obligation to give was not cited as a key factor, although many shared the belief that giving is a norm—something that was not counted as ‘philanthropy.’

Literature on African philanthropy has focused on easily identifiable and reportable acts of philanthropy, to the exclusion of organic philanthropy that occurs daily in community and family ecosystems across the continent.

One of the key drivers of this culture of generosity in Africa is the concept of Ubuntu a traditional African philosophy that emphasises the interconnectedness of all people and the importance of sharing and helping others. Ubuntu is rooted in the belief that a person is only a person through other people, and that everyone has a responsibility to contribute to the well-being of the community.⁴⁰

Historically, and in modern times, philanthropy, more so African philanthropy, has functioned as a glue that binds humanity, promoting solidarity and integration. It is the energy that animates collective action, unity, and self-reliance and the transformation of economic and social relations. It builds social cohesion through its emphasis on creating bonds and bridging differences.⁴¹ The majority of the giving on the continent is embedded in everyday practices and traditions.

Philanthropy in Africa includes giving of the self – of time, expertise, knowledge, goods, social capital, labour, assets, emotional support, mediation and money.⁴² We see these in giving from a place of scarcity and abundance, giving often from what you have, not what you have ‘left over’.⁴³

³⁸ IRIN News (2014). Tapping into a tradition of giving

³⁹ Halima Mahomed (2023). Our Giving. African philanthropy and the narrative divides

⁴⁰ <https://www.givingtuesday.org/blog/the-impact-of-culture-on-generosity-in-africa/>

⁴¹ Aina, T. A., & Moyo, B. (2016). Giving to Help, Helping to Give. The Context and Politics of African Philanthropy. Dakar. Amalion Publishing; TrustAfrica.

⁴² Mahomed, H., & Coleman, E. (2016). Claiming Agency. Reflecting on TrustAfrica’s First Decade. Dakar. TrustAfrica.

⁴³ Mahomed, H., & Bofu Tawamba, N. (2022). Centering pan-African philanthropies amid the shifting global socio-political and economic order in Mail & Guardian, 27 May 2022. Johannesburg. Mail & Guardian.

For decades, the stereotypical image of philanthropy in Africa has been of places like the Kibera slum in Nairobi, a remote village in Uganda, or the streets of Addis Ababa. A legacy of uneven economic development, colonialism and political instability has turned the continent into a favoured destination for charitable investments from philanthropists around the world.

However, most of such investment to date has been driven by the voices and actions of people from outside of the communities it is intended for. Its value or impact, therefore, is inherently limited.

The traditional model of philanthropy needs to evolve to ensure it fulfils its own potential as a catalyst for growth, and best serves the needs of those it is intended to support.⁴⁴

Generosity and informal philanthropy are significant on the African continent. Generosity and informal philanthropy are significant on the African continent. The various religious roots, and traditional and cultural heritages contribute to a culture of generosity across societies. In addition, diaspora communities have contributed both philanthropic flows and volunteer talent in key areas such as education, health, and climate mitigation.⁴⁵

According to Gbenga Oyebode, a Ford Foundation trustee, philanthropy in Africa, particularly in Nigeria, is experiencing a transformative shift,⁴⁶. Oyebode discusses the complexities of philanthropy in Africa, emphasising the continent's diversity, growth, and innovation. He highlights the need for strategic giving and the emergence of corporate foundations across the continent, driven by a recognition that philanthropy can catalyse essential changes where governments may fall short. Oyebode also explores the concept of impact investing, stressing the importance of economic returns intertwined with social impact. The discussion underscores the challenges and opportunities in African philanthropy, pointing towards a future characterised by strategic, collaborative, and culturally embedded giving practices.

In South Africa, the prevalence of philanthropic giving prompts a critical question- can this generosity drive structural societal change? (Everatt, Habib, Maharaj & Nyar, 2005)⁴⁷. However, concerns linger about philanthropy merely perpetuating existing inequalities without challenging the status quo. Corporate giving, for instance, might be accused of inadvertently supporting an unjust system. Reflecting on Martin Luther King's words, it becomes crucial to consider the circumstances of economic injustice that philanthropy seeks to address.

Contemporary giving patterns in South Africa align with some global philanthropic trends, emphasising the role of religion in driving and organising giving. Surprisingly, giving is more widespread in poorer communities, challenging assumptions that wealthier individuals give more. Moreover, the giving process is intricately linked to familial obligations rather than being purely voluntary, providing rich empirical insights into philanthropic dynamics.

⁴⁴Ellen Agler, 2023 "Why philanthropy for - and by - Africans is the future" available online at. <https://philanthropycircuit.org/blog/why-philanthropy-for-and-by-africans-is-the-future-2/>

⁴⁵Una Osili (2022). Philanthropy plays a vital role in meeting development challenges and mitigating crises in subSaharan Africa

⁴⁶<https://www.fordfoundation.org/news-and-stories/big-ideas/the-future-of-philanthropy/ideas/africa-your-time-is-now/>

⁴⁷Everatt, D., Habib, A., Maharaj, B., & Nyar, A. (2005). Patterns of Giving in South Africa. *Voluntas. International Journal of Voluntary and Nonprofit Organizations*, 16(3), 275-291. <http://www.jstor.org/stable/27927974>

2.2. Family Philanthropy in Eastern Africa: In-Country Considerations

A 2020 study by the Charities Aid Foundation⁴⁸ indicated that in Kenya, the growing middle class is giving away 22% of their monthly income, in Tanzania it stands at 24% and in Uganda, 31% of the middle class giving to charity. Much of this grassroots philanthropy comes through informal gifts and support to family, friends, and community members, with only 2% of those surveyed in Kenya, 3% in Tanzania, and 0% in Uganda saying they had not given to any group or individuals in the last 12 months.

The study further established that around half of survey respondents in Uganda (54%) and Kenya (48%) had supported a faith-based organisation, the main type of formal charity or organisation supported in these two countries. In Tanzania however, people are far more likely to have supported a community-based organisation (50%).

54%
of survey respondents in Uganda supported a faith-based organisation the main type of formal charity

48%
of survey respondents in Kenya supported a faith-based organisation the main type of formal charity

In Tanzania, **50%**
of the people are far more likely to have supported a community-based organisation

In Eastern Africa, family philanthropy and giving traditions are evolving in response to societal changes, economic development, and the increasing influence of technology. These countries exhibit unique characteristics in their approach to philanthropy, reflecting diverse cultural landscapes.

Across the region, there is an emerging pattern of intergenerational philanthropy, where families involve younger members in decision-making processes. This trend ensures the continuity of family giving traditions and introduces fresh perspectives. Families are also exploring impact investing, aligning their philanthropic goals with sustainable and socially responsible investment strategies. The focus is not only on immediate aid but on creating lasting, positive change within communities.

⁴⁸<https://www.cafonline.org/docs/default-source/about-us-publications/growing-giving-in-kenya-uganda-and-tanzania-report.pdf>



2.2.1. Giving Traditions in Kenya

Giving is deeply rooted in Kenyan culture, with most of the charity flowing via relationships of trust and compassion rather than formally recognized organisations. Faith-based charitable groups are a significant source of massive philanthropic assets, particularly in land and properties.

There is a high demand for community activities to create and maintain basic infrastructure in the health and education sectors. There is an increase in community-based philanthropy, and there are also new ways to raise and manage funding, such as matching grants, property rents, and for-profit income-generating investments for cross-subsidization across sectors.⁴⁹

The spirit of giving in Kenya is embodied in traditional and modern manifestations. Whenever faced with tragedies, it is common to find Kenyans joining forces through giving to overcome hurdles. Thus, in communities with humble means, it is common to pool resources to build schools, send teenagers to college abroad, donate medical assistance, foster orphans, and provide a wide range of mutual aid and support.

Indigenous forms of Kenyan philanthropy include several mechanisms widely practised since ancient times throughout Africa, although described by different names in various countries and ethnicities.

Individual and community philanthropy ranging from simple merry-go-rounds, religious tithing, and community revolving funds to large scale resource mobilisation through “harambees” are longstanding, common Kenyan philanthropy tools. Villages in Kenya often gather funds by hosting harambees, a Swahili word for “pull together.”

⁴⁹See <https://www.sdgphilanthropy.org/Kenya>

Harambees are days of singing, storytelling, and speeches, where families and interested persons donate what they can for a community project. Funding is often used for community infrastructure or educational projects, particularly schools, churches, centres, and scholarships. Funding can include in-kind or cash support. Harambee became a rallying cry promoted by Kenya's founding father and first president Jomo Kenyatta that today also inspires cooperation for the sake of self-help and development.⁵⁰

The widespread culture of compassion persists despite the ravages of civil conflict, corruption, development, and severe poverty. It is in fact the glue that holds Kenyan and most African society together. However, while a strong culture of generosity exists, it is informal rather than CSO oriented. As such, while Kenya's growing middle class has been giving 22% of their monthly income, this is often done through informal gifts and support to family, friends, and neighbours.

Kenya's growing middle class has been giving

22%

of their monthly income, this is often done through informal gifts and support to family, friends, and neighbours.

Kenyans engage with a wide range of individual and community giving but feel most positively about faith-based organisations. Religion is the second biggest motivation for giving behind personal attachment to a cause. Lamentably, CSOs' work is perceived as an alien sphere where donations trickle from outside.⁵¹

In recent times, there has been a remarkable shift in institutional giving in Kenya overall because of increased public awareness of philanthropy, legislative and regulatory changes. This has promoted public grant-making charities and other forms of institutionalised giving in the country. Civil society organisations, high-net-worth individuals, community, corporate foundations, and trusts make up the current giving ecosystem.

The popularity of institutional giving in Kenya is growing, owing to an increase in the number of philanthropic organisations.⁵² Buoyed by technological developments in the finance sector, Kenyans have opened to giving.

In 2011 for instance, 'Kenya for Kenyans' raised £6m from 250,000 individuals to provide famine relief. Backed by leading telecoms company, Safaricom, a rapid awareness campaign coupled with the MPesa mobile payments platform quickly brought in contributions.⁵³

⁵⁰Copeland-Carson J. (2007). *Kenyan Diaspora Philanthropy. Key Practices, Trends and Issues*, Harvard University

⁵¹Charities Aid Foundation. 2020. *Growing Giving in Kenya*. Kings Hill, Kent. Charities Aid Foundation

⁵²EAPN. *Local philanthropy environment in Kenya*. EAPN. Accessed November 16, 2022.

⁵³Global Thinkers Forum (2023). *Philanthropic Giving In Africa*

Kenyans for Kenyans Campaign

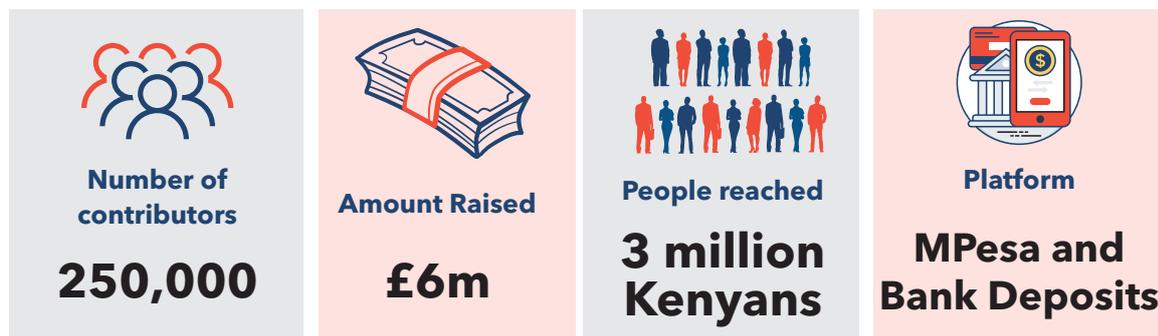


Table 1. Kenyans for Kenyans Campaign

The motivation for giving has been established to be extremely high. A study by⁵⁴ The Aga Khan foundation has found that up to 93% of the respondents were involved in actions of giving in the months preceding the study. The study established that more than half of those who give, do so as part of religious groups. Women give as part of religious and self-help groups, while men are more philanthropic as part of peer groups, family groups and business partnerships.

The study further showed that 71% of Kenyans believe it is better to empower people towards economic independence rather than giving cash. 67% of respondents believe that volunteering is more efficient than giving cash while 61% of Kenyans only give to charity when they hear from or see those in need. Finally, 69% of Kenyans believe that charity organisations should focus on making those in need more self-sufficient.⁵⁵

71%

of Kenyans believe it is better to empower people towards economic independence rather than giving cash

67%

of respondents believe that volunteering is more efficient than giving cash

61%

of Kenyans only give to charity when they hear from or see those in need

69%

Kenyans believe that charity organisations should focus on making those in need more self-sufficient.⁵⁵

In the true African spirit, Kenya has enjoyed a deep and rich history of helping those in need and giving towards what local communities perceive as good. From a tender age, Kenyan children have been socialised to assist those in need. This communal giving culture and history, built on individual or household donations towards helping those in need at the community/family level (including diaspora efforts), has seen many Kenyan households and communities supported to manage immediate needs.⁵⁶

⁵⁴Yetu (an) Why Kenyans Give. A Nationwide Survey Of Philanthropic Behavior available online at. <https://africanphilanthropy.issuelab.org/resources/26391/26391.pdf>

⁵⁵Yetu (an) Why Kenyans Give. A Nationwide Survey Of Philanthropic Behavior available online at. <https://africanphilanthropy.issuelab.org/resources/26391/26391.pdf>

⁵⁶Faustina Fynn-Nyame, Tapping Kenya's Hospitable Spirit For Sustainable Change available online at. <https://impactphilanthropyafrika.org/tapping-kenyas-hospitable-spirit-for-sustainable-change/> accessed 9/12/2023 at 11.23

The culture of Kenya is also reflected in the international landscape. According to the World Giving Index 2022, which measures generosity across the world, African countries consistently rank among the most generous in the world. **Kenya is the second-most-giving nation after Indonesia, with a score of 61%, up from 58% in 2020.**

Kenya scored significantly higher than the global average for helping a stranger in 2021, with 77% of Kenyans doing so compared to 62% globally.

The underpinnings of Kenyan culture and religious influence continue to contribute to actions around giving and therefore it is important for us to reinforce these positive values.⁵⁷ Other African countries like Nigeria, Ghana, Sierra Leone, South Africa, Uganda, and Tanzania also ranked high on the index, reflecting the strong culture of generosity that exists across the continent.

The State of Philanthropy in Kenya in 2022⁵⁸ reflects a broader landscape that encompasses corporate, private sector, and individual contributions to societal welfare. While the report primarily focuses on corporate and organisational philanthropy, it hints at the importance of individual and community giving, driven by a strong culture of generosity, local traditions, and religious motivations.

In the context of family giving, these elements resonate with the Kenyan tradition of Harambee, emphasising self-help and cooperative efforts. Despite the report's focus on corporate entities and foundations, there is an implicit acknowledgment of the role families play in informal giving, often directed towards friends, family, and neighbours.

As the philanthropy ecosystem evolves, there's potential for interventions to bridge gaps, making formal giving to civil society organisations more accessible and transparent, aligning with the ethos of family and community support seen in traditional Kenyan practices. The report lays the groundwork for understanding the complex nature of philanthropy in Kenya, with implications for family-based giving practices.

Despite these realities, philanthropy in Kenya remains largely ad hoc, with little strategic coordination for impact. This lack of institutionalisation and coordination negatively affects the sustainability of philanthropic initiatives. Even so, this may be symptomatic of the uncondusive national policy and legal environment for giving and volunteering. While some necessary regulatory frameworks and governing bodies are already established, these are unevenly implemented, and key gaps to fully tap into the value of philanthropy persist.⁵⁹

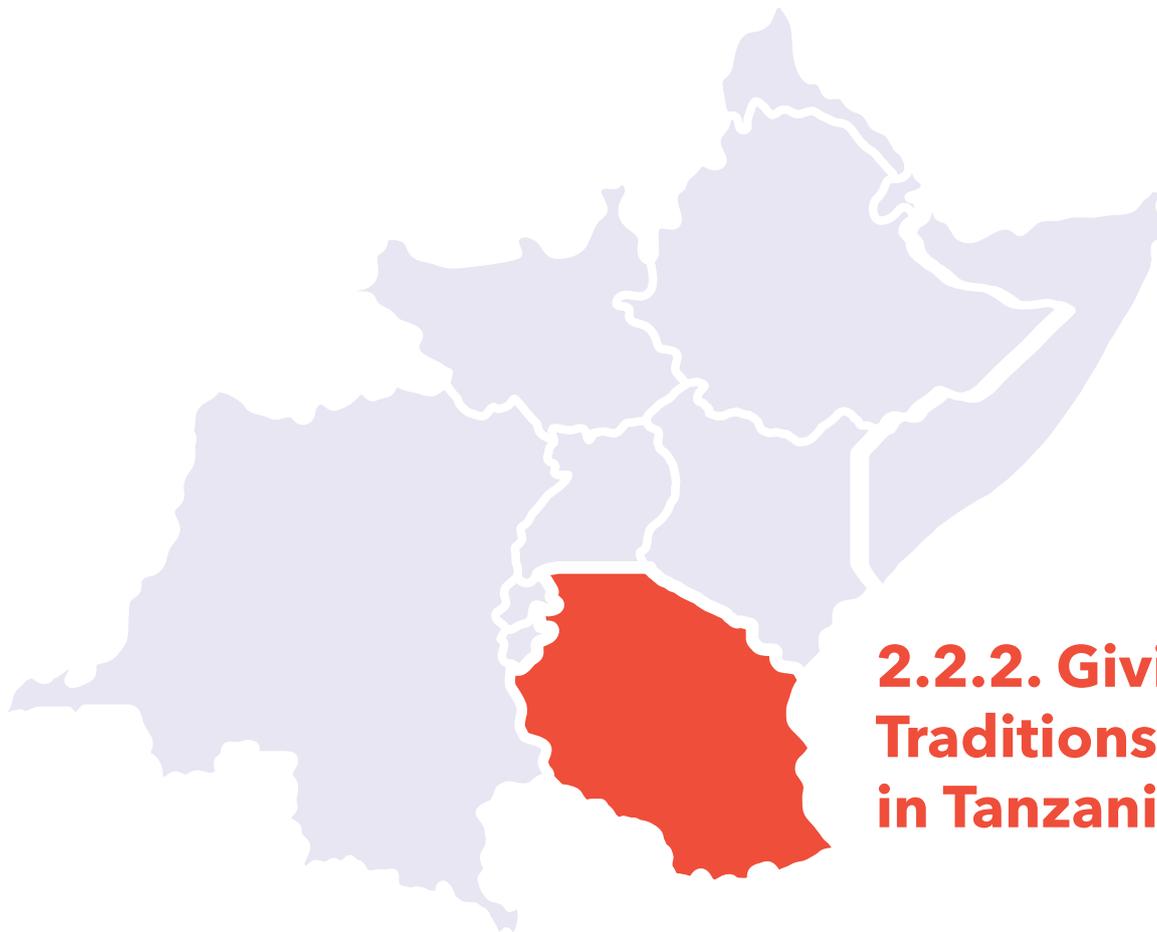


Figure 1. Giving is embedded in Kenyan culture.

⁵⁷<https://www.givingtuesday.org/blog/the-impact-of-culture-on-generosity-in-africa/>

⁵⁸<https://www.cafonline.org/docs/default-source/international/country-philanthropy-profiles/caf-kenya-the-state-of-philanthropy-in-kenya.pdf>

⁵⁹ Children Investment Fund Foundation (2021). Catalyzing Local Philanthropy in Kenya



2.2.2. Giving Traditions in Tanzania

In Tanzania, there exists a culture of giving driven by a desire to improve the welfare of others, besides a sense of obligation that accompanies the privilege of belonging. Except for a few high net-worth philanthropists, the giving is often not structured or consistent. Despite a rising number of Tanzanians contributing to charitable causes, the actual amounts generated locally are often lower than those by high net-worth philanthropists. Limited information, trust issues, and unsupportive attitudes present challenges in tapping into the full local giving potential.

Many philanthropy actors receive resources from individuals, families, companies, government and allocation from their own revenues. The actual amounts from these sources are quite meagre, with the combined value being less than 10% of total sector funding.⁶⁰ In Tanzania in particular, the practice of philanthropy is not new. It is embedded in the practices of almost all ethnic groups; religious groups; and, even the *Ujamaa* policy, which was enforced between the 1960s and 1980s.

The primary funding sources for philanthropic endeavours in Tanzania include Trusts and Foundations, International Non-Governmental Organisations (INGOs), and own-generated incomes. Achieving a balance between resources generated locally and internationally is crucial for sustained impact.

Rooted in a tradition of social solidarity and mutual aid reciprocity, Tanzanian society emphasises the interconnectedness of individual well-being with that of the community. The *Ujamaa* ideology further promotes identity and self-reliance developed through community engagement.

There is a strong giving culture in Tanzania that thrives in socio-cultural engagements and in support of specific events and emergencies, but it has not yet been tapped or directed as a deliberate strategy for resourcing communities' own development. Despite Tanzania's strong sense of community and history of communal practices, community philanthropy has not

⁶⁰ Foundation for Civil Society (2018).



Figure 2. The Ujamaa Philosophy advocates for self identity and self-reliance

yet been adopted - or encouraged - on any significant scale as an organised strategy for mobilising resources and strengthening communities' voice, agency and power in the context of development work.⁶¹ Much of the individual giving and mobilising for individual donations happens through religious settings, churches and mosques.⁶²

It has also been observed of the emergent structured form of philanthropy, which include grantmaking foundations established by wealthy individuals, a strong community of youth philanthropists, a rise in corporate giving, and the proliferation of community philanthropy organisations (Foundation Center et al., 2016).⁶³

A report on the state of philanthropy in Tanzania⁶⁴, published by the Foundation for Civil Society and the Tanzania Philanthropy Forum, reveals a significant dependence on external funding by Tanzanian NGOs. Approximately 57% of respondent organisations stated that their revenues were solely derived from external sources, with international NGOs (INGOs) being the primary contributors, providing 71% of the funding.

The report, based on research conducted between February and April of the year 2018, identifies challenges for the sector, including the inability of local organisations to attract local income, a regulatory framework lacking fiscal incentives for giving, and accountability challenges. Recommendations include enhancing NGO capacity for partnerships, advocating for regulatory consolidation, and identifying philanthropy champions to stimulate more internal and local resources for civil society.

In 2021, the Global Fund for Community Foundations (GFCF) initiated a study named Kukuza Uwezo , meaning "We build our own capacity" in Kiswahili. This research, conducted within the

⁶¹[Susan Njambi Odongo & the Global Fund for Community Foundations \(2023\). Reimagining Civil Society Resourcing in Tanzania a Scoping Study.](#)

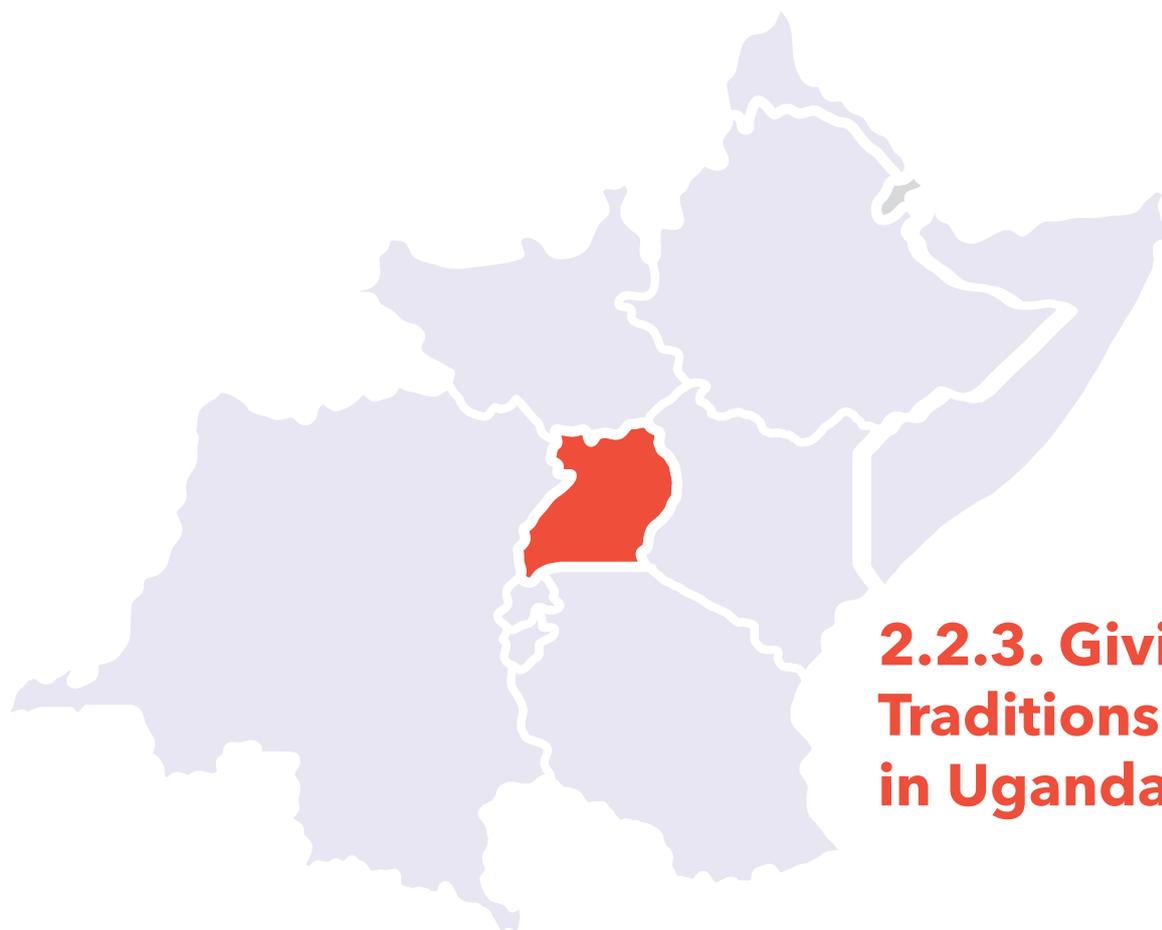
⁶²[Indiana University \(2022\). The 2022 Global Philanthropy Environment Index Tanzania, Lily Family School of Philanthropy](#)

⁶³[Foundation Center, East Africa Association of Grantmakers, Foundation for Civil Society, and Tanzania Philanthropy Forum. \(2016\). TANZANIA. Data Strategy and Capacity Building Data Scoping Meeting. <https://www.issuelab.org/resources/26849/26849.pdf>](#)

⁶⁴<https://www.alliancemagazine.org/blog/tanzanian-philanthropy-sector-still-dependent-on-external-funding/>

broader *Kukuza Uwezo*⁶⁵ program, focused on strengthening Disabled People's Organizations (DPOs) in Tanzania and Uganda. The study discovered existing local resource mobilisation models in Tanzania, emphasising that community philanthropy, although not widely termed, has long been ingrained in socio-cultural practices.

The study advocates for recognizing and fostering these local approaches to enhance community ownership and power in civil society development, emphasising the need for behaviour shifts and investments to amplify their impact.



2.2.3. Giving Traditions in Uganda

Uganda, like many other African countries, has a longstanding tradition of philanthropy that is mostly influenced by culture and by religious practices. A significant percentage of giving in Uganda happens informally and therefore remains largely undocumented (Pascal 2015). Local philanthropy in Uganda focuses mostly on addressing immediate needs such as food, education, health, access to social amenities, and empowerment of marginalised groups.

Community philanthropy is common, especially in rural areas where members come together to form associations/groups to collectively address common socio-economic challenges in their communities. Alongside these community-based norms of solidarity there has also emerged a number of big philanthropic initiatives established by local entrepreneurs, sports personalities, and members of the royal family.

⁶⁵ <https://globalfundcommunityfoundations.org/wp-content/uploads/2023/02/ReimaginingCivilSocietyResourcingIn>



Figure 4. Holding hands depict cooperation to solve communal challenges

The practice of giving by Ugandans for Ugandans, characterised by traditional norms of solidarity, reciprocity, and cooperation. We must emphasise that this is only part of “philanthropy in Uganda” which refers to philanthropic forms found in Uganda, including those from Western sources.

Research on Ugandan philanthropy is only emerging and therefore the practice is still not well understood.⁶⁶ Local philanthropy in Uganda is practised but it is underreported and most of it is not towards CSOs (CAF, 2020) but to individuals. Research on Ugandan philanthropy is only emerging and therefore the practice is still not well understood. A few studies have been conducted on philanthropy by business entities through corporate social responsibility (CSR).

There are traditional manifestations of giving in Ugandan communities. Among the Banyankole and Baganda, this motivation is best illustrated by the cultural practice of “Okutta Omukago,” that involves individuals interested in building a self-help bond performing a ritual of eating a coffee bean smeared with their bloodlets to symbolise and establish a lifelong blood-tie of self help. After this pact, “Okutta Omukago” “brothers” have an obligation to provide for each other’s family as their own to honour and strengthen this pact.⁶⁷

Philanthropy in Uganda is characterised by unique, Africa-specific actions rooted in traditions such as cohesion, self-help, mutual aid, and reciprocity⁶⁸. Known as horizontal philanthropy, it involves various forms like money, prayer, advice, voluntary time, and social connections.

In Uganda, family philanthropy operates within a regulatory framework shaped by constitutional provisions and national development goals. Although the 1995 Constitution does not explicitly mention philanthropy, it emphasises principles supporting autonomy and protection for civic organisations, fostering an environment conducive to family giving. The Uganda Vision 2040 and National Development Plans recognize the private sector’s role, including family philanthropy, in achieving transformative societal goals. However, the regulatory landscape, particularly tax laws, poses challenges and knowledge gaps for family philanthropists.

The existing environment influences philanthropy differently based on sectors supported and has implications for initiatives that question government actions. Recommendations include educating families on the benefits of local giving, organising networking events, and sharing positive family philanthropy stories to inspire public servants and families alike, contributing to the growth and understanding of family philanthropy in Uganda.

[Tanzania_Jan2023.pdf](#)

⁶⁶[CivSource-Africa \(2020a\) Local Philanthropy in Uganda. A Legal and Policy Scan. A research report, CivSource-Africa, Uganda](#)

⁶⁷[CivSource-Africa \(2020\). Finding Philanthropy. Exploring the practice of giving for public good in Uganda](#)

⁶⁸<https://static1.squarespace.com/static/593ea10db8a79bc4102e122f/t/5f7a98a7c8f18a2d034e3b41/1601870105921/local+philanthropy+Report.pdf>



2.2.4. Giving Traditions in Ethiopia

Ethiopians practise in more informal ways. For example, individuals feed the children of widows, give money and manual labour for people organising celebrations or experiencing bereavement for their close friends, neighbours, and members in their community, and mutual-help groups⁶⁹ (Yasin, 2020). The formal CSO sector has a recent history; however, Ethiopian society has a long and entrenched culture of giving to each other since the beginning of its history, as informal mutual aid was a crucial mechanism for poverty relief and protecting society from the evils of historical wars⁷⁰ (Pankhurst & Mariam, 2000).

Early civil society in Ethiopia, including traditional organisations like *idir* and *iqub*, primarily served member interests rather than public concerns. Registered associations under the 1960 Civil Code were professional groups, and government-supported women's associations had limited community impact. Philanthropy gained prominence during the famines of 1973-74 and 1984-85, prompting a surge in humanitarian organisations and faith-based institutions, emphasising the pivotal role of philanthropy during crises in Ethiopia⁷¹.

In Ethiopia, *idir* is a grassroots social network and a leading traditional institution through which people help each other. Although the main purpose of *idir* is often limited to covering funeral expenses and comforting families at the time of a loss of loved ones, some *idirs* are flexible and help people while they are alive. *Iqub* is another traditional institution in which people pool their funds regularly to rotate loans among themselves. Being a voluntary association, *iqub* benefits its members by offering a large loan without requiring collateral physical assets. In Ethiopia, giving to formal non-governmental organisations (NGOs) is limited. The formal giving is practised within religious organisations, such as through tithes, offerings, and zakat. Although most of these contributions are used for covering religious expenses, a number of religious nonprofit organisations transfer part of the contributions to humanitarian and developmental aid projects.⁷²

⁶⁹Yasin, K. I. (2020). *Philanthropy in Ethiopia. A Strong Culture of Philanthropy Amid Challenging but Improving Legal and Fiscal Infrastructure to The CSO Sector.* [Unpublished manuscript].

⁷⁰Pankhurst, A., & Mariam, D. H. (2000). The "Iddir" in Ethiopia. *Historical Development, Social Function, and Potential Role in HIV/AIDS Prevention and Control. Northeast African Studies, Volume 7(2), pp. 35-57.*

⁷¹<https://www.icnl.org/wp-content/uploads/Ethiopia-PLR-report-May-2023-update.pdf>

⁷²Kidist Lilly (2020) *Snapshot on philanthropy in Ethiopia* in <https://blog.philanthropy.iupui.edu/2020/04/08/snapshot-on-philanthropy-in-ethiopia/>

2.3. Policy and regulatory environment for family philanthropy in East Africa.

In this section, we review the legal and policy framework of family philanthropy in east Africa including registration, taxation, handling of incomes, and the importance of following anti-money laundering and counter-terrorism financing rules. Additionally, we examine how government priorities and policies influence family giving, partnerships and stakeholder engagement, incentives for giving and and some ideas for making family philanthropy better in East Africa

2.3.1. Policy and Regulatory Framework Affecting Family Philanthropy in Kenya



The philanthropic sector, encompassing diverse foundations, both domestic and international, engages primarily in education, social and economic development, and health. Furthermore, philanthropic organisations navigate a diverse legal landscape, including the Society Act, Trustee and Cooperation Act, Company Limited by Guarantee Act, NGO Act, and PBO Act 2012. Oversight by the Non-Governmental Organisations Coordination Board involves the registration of entities under various legal structures, such as companies with limited liability and trusts⁷³.

Formal family giving is guided by the **“Trustees (Perpetual Succession) Act” (Act**

No. 12 of 1923)⁷⁴. This legislation facilitates the creation of family trusts by individuals or joint settlers for estate planning. The act defines a family trust as a non-trading entity formed to preserve or generate wealth for generations, allowing settlers to include themselves as beneficiaries without invalidating the trust. It outlines procedures for adding property, the validity of trusts, and the role of enforcers—individuals appointed to oversee trust implementation, ensuring transparency and accountability. The act establishes a legal framework, fostering an environment that supports philanthropy within families by providing perpetual succession and clear guidelines for compliance.

The Perpetuities and Accumulations Act in Kenya⁷⁵, outlined in Act No. 6 of 1984 and amended by Act No. 10 of 2022, plays a crucial role in guiding families engaged in estate planning and property management. This legislation governs the duration of perpetuity periods, ensuring that property interests do not vest beyond specified limits and providing guidelines for the accumulation of income. Particularly relevant for family trusts, the Act allows legal accumulation of income for a defined period, aligning with the trust’s intended duration. For families involved in philanthropy, the Act’s provisions on charitable dispositions ensure the validity of charitable donations, even in cases of non-compliance with certain rules, underscoring the importance of supporting charitable causes within the perpetuity period. The Act also offers flexibility by allowing beneficiaries to terminate accumulations and transfer property when they have an absolute personal stake, emphasising the dynamic intersection between family decisions, property management, wealth transfer, and charitable contributions under this legal framework.

2.3.2. Policy and Regulatory Framework Affecting Family Philanthropy in Uganda



Overview of Regulatory Framework for Philanthropy in Uganda.

The regulatory framework for CSOs, governed by the NGO Act of 2016, reflects a global trend of government regulation to ensure good governance, accountability, and coordination. The regulatory environment for family philanthropy in Uganda is governed by the NGO Act of 2016, alongside laws such as the NGO Regulations, 2017, Fees Regulations, 2017, Companies Act, 2012, and Trustee Incorporation Act, 1939. These laws establish legal obligations for family philanthropists.

Normative Framework Supporting Family Giving.

Examining the normative framework, including the 1995 Constitution, Uganda Vision 2040, and National Development Plans (NDPs), provides a foundation for family giving. While the Constitution emphasises human dignity and development, Vision 2040 recognizes the role of the private sector and civil society in

⁷³<https://cof.org/content/nonprofit-law-kenya>

⁷⁴<http://kenyalaw.org:8181/exist/kenyalex/actview.xql?actid=CAP.%20164#:~:text=The%20trustees%20shall%20thereupon%20become,and%20acquire%2C%20and%20by%20instruments>

⁷⁵<http://kenyalaw.org:8181/exist/kenyalex/actview.xql?actid=CAP.%20161>

philanthropy. The NDPs acknowledge philanthropy within the private sector, creating awareness of local philanthropy.

The regulatory environment for family philanthropy in Uganda is governed by the NGO Act of 2016, alongside laws such as the NGO Regulations, 2017, Fees Regulations, 2017, Companies Act, 2012, and Trustee Incorporation Act, 1939. These laws establish legal obligations that family philanthropists must adhere to for legal operation. Compliance with regulatory obligations, as outlined in the NGO Act and related laws, is essential for family philanthropists. This includes understanding and fulfilling reporting requirements to ensure legal operation.

2.3.3. Policy and Regulatory Framework Affecting Family Philanthropy in Tanzania



Legal Structures and Registration

Tanzania lacks a dedicated legal framework for family philanthropy. Instead, family-driven entities adhere to various laws regulating charitable activities. Notably, the Written Laws (Miscellaneous Amendments) (No. 3) Act of 2019 governs non-profit organisations (NPOs) in mainland Tanzania. The main NPO form is an NGO, defined by voluntariness, self-governance, and public benefit operation. The main form of NPO in mainland Tanzania is specified as a “non-governmental organisation (NGO).” It must be voluntary, self-governing, not-for-profit, and operate for a public benefit purpose, such as enhancing economic, social, or cultural development. NGOs are mandated to adopt the standard NGO Constitution provided under the 2019 Regulations issued under the NGO Act. Other regulations include Companies Act, NGOs Act, Trustees Incorporation Act, and Societies Act.

Tax Regulations

Tanzania provides minimal fiscal and tax incentives to promote local philanthropy. The absence of comprehensive tax breaks hinders the development and growth of family philanthropy initiatives. Tax exemptions for family philanthropy entities in Tanzania are contingent upon obtaining “charitable” or “religious” organisation status. These organisations, including NGOs, may enjoy partial income tax exemptions. The Income Tax Act of 2019 outlines the criteria, and eligible organisations can claim deductions for contributions made, encouraging support for family giving initiatives.

Compliance and Reporting Obligations

Family philanthropy entities, particularly NGOs, are subject to compliance with various laws, including the NGO Act and the Companies Act. Compliance involves adopting standard NGO Constitutions and adhering to reporting obligations. Voluntary dissolution requires adherence to prescribed procedures, ensuring transparency and legal adherence.

2.3.4. Policy and Regulatory Framework Affecting Family Philanthropy in Ethiopia

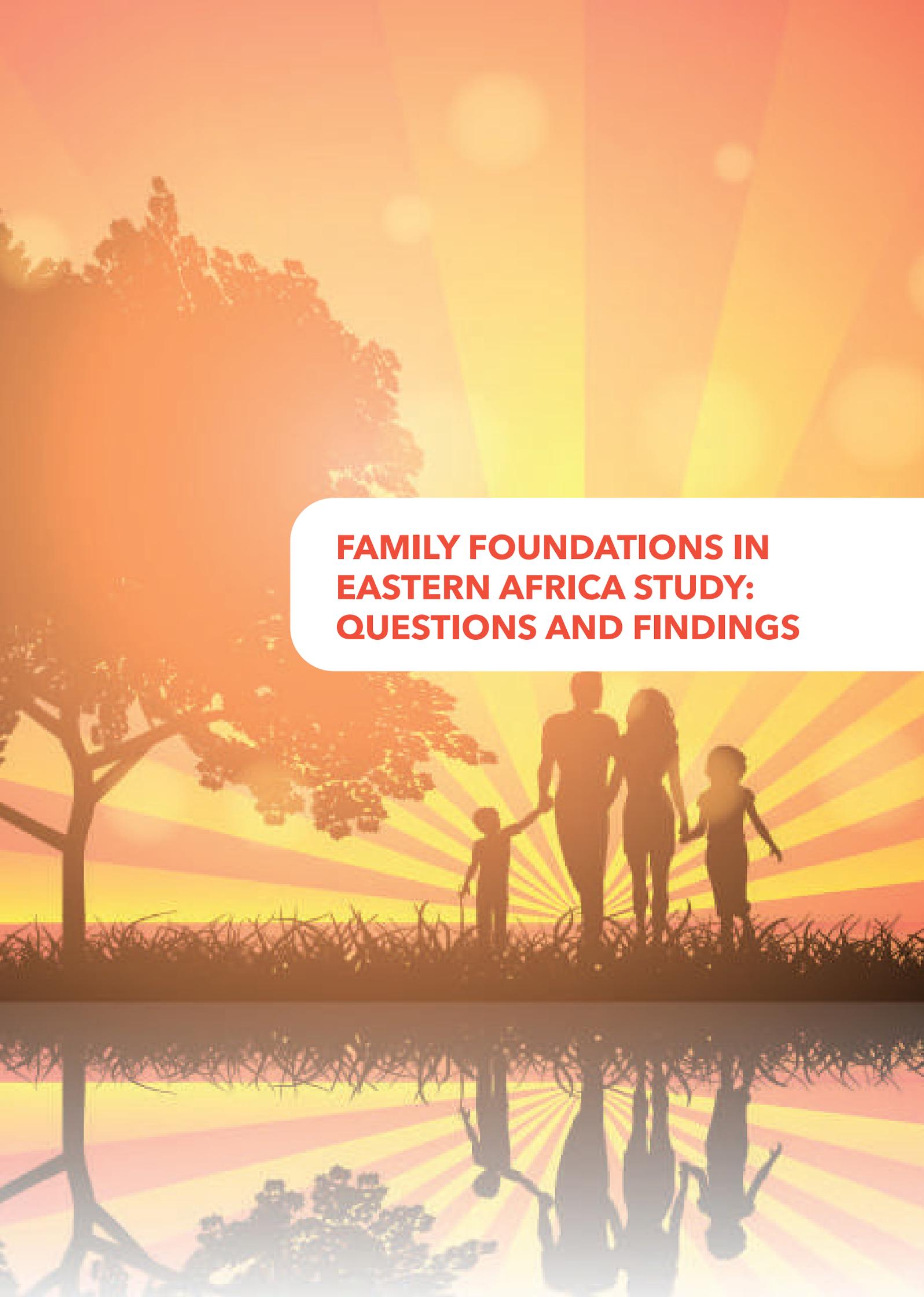


Legal Structures and Registration

The landscape of family philanthropy in Ethiopia is significantly influenced by the Civil Society Organizations Proclamation No. 1113/2019, which governs civil society organisations (CSOs), including family foundations. Besides the Charities and Societies Proclamation (CSP) No. 621/2009, CSOs, including family foundations, adhere to the Civil Society Organizations Proclamation. This dual framework emphasises compliance with the Constitution of the Federal Democratic Republic of Ethiopia (1994) and the Civil Code Proclamation No. 165/1960.

Tax Regulations

Family philanthropy entities in Ethiopia, as part of Civil Society Organizations (CSOs), operate under the Income Tax Proclamation No. 979/2016. This regulation grants tax exemptions for income from grants, donations, and membership fees but subjects NPOs engaged in economic activities to income tax. Most NPOs face Value-Added Tax (VAT) on purchases, with exemptions possible for specific activities. Tax-deductible donations hinge on criteria like CSA registration and adherence to the 10% limit on taxable income. Notably, the 2016 income tax law, excluding deductions for donations to non-health or education-focused organisations, may impact fundraising for causes such as human rights, democracy, and conflict resolution.

The background features a warm, golden sunset with rays of light radiating from the top right. In the foreground, the silhouettes of a family—a man, a woman, and two children—stand on a grassy bank, holding hands. To the left, a large tree is silhouetted against the sky. The bottom half of the image shows a reflection of the family and the tree in a body of water, creating a symmetrical effect.

**FAMILY FOUNDATIONS IN
EASTERN AFRICA STUDY:
QUESTIONS AND FINDINGS**

CHAPTER THREE:

FAMILY FOUNDATIONS IN EASTERN AFRICA STUDY: QUESTIONS AND FINDINGS

3.1. Research problem

The concept of giving is deeply embedded in African cultures characterised by strong familial and communal ties that have long shaped philanthropic practices on the continent⁷⁶. However, global philanthropic frameworks, which are often defined by Western-centric ideals, may fail to capture the full scope and depth of African giving traditions, particularly within families. This misalignment raises important questions about the applicability and inclusiveness of existing models of philanthropy in the African context, especially in East Africa, where family-based giving plays a significant role in addressing societal needs.

A key issue in this discussion is the contrast between traditional African family giving and Western-defined philanthropy. African family giving is often informal, deeply relational, and responsive to immediate community needs, while Western philanthropy is typically structured, institutionalised, and focused on long-term strategic impact.

This divergence suggests that current global philanthropic frameworks may not fully account for the values, practices, and cultural contexts of African families. The lack of inclusiveness in these frameworks not only limits their relevance but also poses challenges for families seeking to formalise their giving in ways that align with global standards without losing the essence of their traditions.

Moreover, there are specific barriers hindering the growth and effectiveness of family giving in East Africa, including the absence of supportive legal frameworks, limited documentation of philanthropic activities, and inadequate state involvement. These challenges further marginalised African family giving within the broader philanthropic discourse, reducing opportunities for its recognition and development. There is a need for better synchronisation and networking among the various forms of giving.⁷⁷

This research seeks to address these gaps by investigating the nature of African family giving, digging deeper into the motivations that drive these families to give, the decision-making processes, the values considered important by the family foundations and identifying the specific barriers to effective family giving in East Africa.

By promoting a more contextualised understanding of philanthropy that embraces African traditions, this study aims to foster a more inclusive philanthropic landscape that better supports family giving and its potential for social change.

⁷⁶ https://trustafrica.org/wp-content/uploads/2023/07/HM_Paper1_Our_Giving_NV.pdf

⁷⁷ East Africa Association of Grant Makers (2012) The state and nature of philanthropy in East Africa.

3.2. Objectives

The study aimed to explore and understand family giving traditions in East Africa by examining the philanthropic initiatives of various foundations initiated by individuals in the region.

The objectives include:-



3.3. Study questions

The study seeks to explore and understand family giving traditions in East Africa by examining the philanthropic initiatives of various foundations established by individuals in the region. The key research questions include:

1. What are the structures, values, and operational strategies of philanthropic foundations in East Africa?
2. How does family giving impact diverse aspects of East African society, including cultural preservation, education, healthcare, environmental sustainability, and community development?
3. How do family philanthropic foundations navigate succession and intergenerational transitions to ensure continuity and effectiveness?
4. What challenges do family giving initiatives face, such as funding constraints, bureaucratic hurdles, and biases, and what opportunities exist for growth and sustainability?
5. What emerging trends and innovative approaches are shaping family giving traditions, including the use of technology, sustainability initiatives, and shifts in focus areas?
6. What legacies do the founders of these philanthropic foundations aspire to leave?
7. What key insights and recommendations can be drawn from the study to guide future family giving practices in East Africa?



3.4. Research Approach and Methodology

3.4.1. Research Approach

This study employed a qualitative approach to explore family giving traditions in East Africa, with a focus on Kenya, Tanzania, Ethiopia, and Uganda. The qualitative design allowed for an in-depth understanding of the complex cultural and philanthropic practices inherent in family-based giving, particularly in relation to sustainability, succession planning, and legacy.

All ethical protocols were observed where each participant was informed about the study purpose, how it would be conducted, how the data was going to be processed and findings shared. For each, informed consent was obtained affirming willingness to participate in the study and for the findings to be used for shared learning purposes.

3.4.2. Data Collection

Data was gathered through semi-structured key informant interviews conducted in the four countries. A total of 18 interviews were conducted—four (4) in Ethiopia, five (5) in Uganda, four (4) in Tanzania, and five (5) in Kenya.

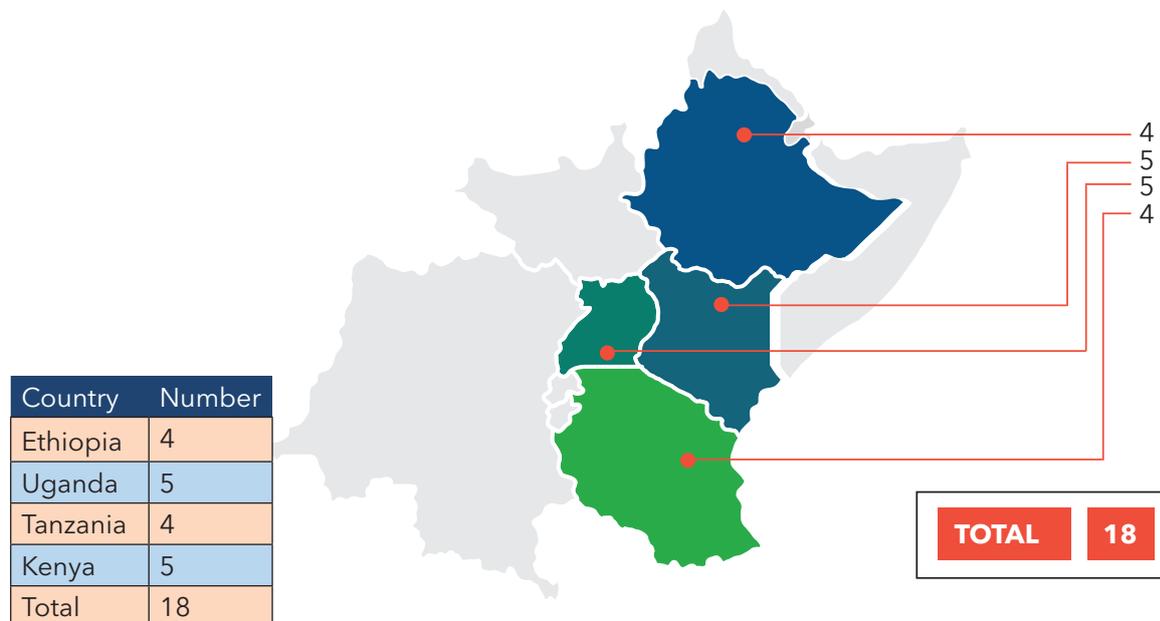


Table 2. Distribution of respondents

Interviews took 45 minutes to 1 hour 15 minutes. This variation was to allow for participants to share as much information as they could, allowing for cross checking of feedback as the interviews progressed.

The interview proceedings were captured through audio recording instruments after getting the consent from the participants. The participants included founders, board members, and senior staff from family foundations, offering detailed insights into their philanthropic strategies and practices.

An extensive review of existing literature on family giving traditions and philanthropy was conducted to supplement the primary data. This literature provided context, offering insights into broader trends in family philanthropy globally and in East Africa.

The combination of primary interview data and secondary literature created a comprehensive foundation for understanding the practices and challenges faced by family foundations in the region.

3.4.3. Data Analysis and presentation.

The recorded interviews were transcribed in word format ensuring that the verbatim context was maintained to preserve the content as shared before being subjected to analysis. The data was analysed using Braun and Clarke's (2006) thematic analysis, which is ideal for identifying and organising patterns within qualitative data. The analysis followed six steps: familiarisation with the data, generating initial codes, searching for themes, reviewing themes, defining and naming themes, and reporting the findings.

The findings from the thematic analysis were cross-referenced and contextualised with relevant literature to ensure a robust interpretation of the data. This approach allowed for the validation of emerging themes against established knowledge and areas identified, where the interview insights aligned with or deviated from existing scholarly discourse.

The research engaged an iterative approach, seeking feedback and validation from various actors and stakeholders. This collaborative approach, which included regular feedback from stakeholders, guaranteed that the findings were accurate and reliable. The inclusion of data from the literature review into the thematic analysis was helpful in developing a well-rounded and detailed representation of family giving in the region. The conclusion synthesised key findings, providing a comprehensive overview of the essence, impact, challenges, opportunities, and trends in family giving traditions in East Africa.

3.5. Organization's purpose and impact areas

From the 18 respondents interviewed, the focus areas of their organisations varied across different sectors. Four respondents indicated their focus was on education, while three highlighted community impact and well-being. Another three emphasised cultural empowerment, and two respondents focused on community sustainability. Additionally, two organisations concentrated on promoting a culture of philanthropy, and two more were dedicated to fostering government collaboration in development. One respondent identified the promotion of digital technology in solving social problems as their key area, and another focused on environmental conservation.

Priority areas for Foundations

Focus area	Number of respondents	Percentage
Education	4	22.2%
Community Impact and well-being	3	16.7%
Cultural empowerment	3	16.7%
Community Sustainability	2	11.1%
Promoting a culture of philanthropy	2	11.1%
Promoting government collaboration in development	2	11.1%
Promotion of digital technology in solving social problems	1	5.6%
Environmental conservation	1	5.6%

Table 3. Priority areas for Foundations

These themes reflect the core values and approaches of family philanthropy, showcasing the diversity of focus areas and long-term impact strategies employed by different foundations. The most prominent theme is Education, which is central to the work of organisations such as the Karimje Foundation, Palm House Foundation, and Agape Restoration Foundation.

These organisations emphasise the transformative role of education in breaking the cycle of poverty, particularly through educational scholarships and support for vulnerable children. Family giving in this context is not only about immediate relief but also about fostering long-term development, with a commitment to empowering future generations through access to education.

Community Impact and Well-being also emerged as a significant theme. Organisations like the Masarat Humanitarian Organisation, Elevate a Child Trust, and Mukisa Foundation highlight their efforts in community outreach, rehabilitation, and reintegration, particularly in education and health sectors. These organisations address societal needs through a holistic approach, ensuring that the impact of their giving extends beyond the immediate beneficiaries to the broader community.

Another key theme is the **Cultural Significance** of family giving, particularly among organisations like the Masarat Humanitarian Organisation, Chandaria Foundation, and Elevate a Child Trust. In many cases, giving is rooted in cultural traditions and values, seen as a communal duty that reflects shared principles of stewardship and care. Among Asian communities, for instance, there is a strong emphasis on instilling philanthropic values in children, ensuring that they embrace the responsibility of managing family resources and businesses in a way that benefits society.

Sustainability and Legacy emerged as a critical focus for organisations like the Mama Wellness Community Center and the Karim G Foundation. These organisations prioritise not only the immediate impact of their philanthropic activities but also the long-term sustainability of their efforts. For example, Mama Wellness has reached over 5,000 children and their families with health and education programs, while also developing training materials on disability care. These organisations strive to leave a lasting legacy, ensuring that family giving traditions continue through successive generations.

Philanthropic Traditions and Generational Perspectives were highlighted by families like the Ratansi family and Lilian's work. These traditions underscore the importance of passing down philanthropic values and maintaining a long-term commitment to education and poverty alleviation. The emphasis is on educating the next generation about the historical roots of their family's giving and continuing this legacy through sustained philanthropic engagement.

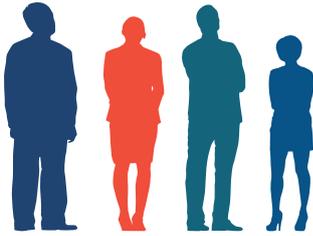
The theme of **Government Collaboration and Partnerships** was also significant, with organisations like the Mama Wellness Community Center and Elevate a Child Trust viewing government collaboration as essential for sustainability. These partnerships enable organisations to expand their reach and ensure the continuity of their programs by aligning with national priorities and securing governmental support for their initiatives.

The role of **Digital Tools and Technology** is increasingly recognized as a way to enhance program effectiveness. Organisations, particularly the Mama Wellness Community Center, have begun integrating digital tools, often with support from partners like UNICEF, to improve monitoring and impact assessment of their projects. Technology thus becomes an essential component in scaling their philanthropic efforts and ensuring efficiency in service delivery.

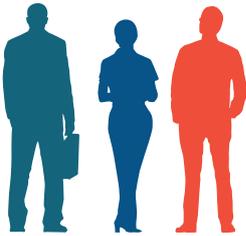
Lastly, **Environmental and Cultural Conservation** is a theme embodied by the Wangari Maathai Foundation, which integrates environmental conservation into its philanthropic agenda. This foundation's work illustrates the broader interconnectedness between environmental and societal well-being, showing how family giving can contribute to preserving cultural heritage and promoting ecological sustainability.

3.6. Sustainability Models

Foundations in East Africa often employ a range of strategies for sustainability, such as self-financing, external donors, endowment funds, and income-generating projects like real estate. Improving resource management, creating environmental impact, strengthening internal structures, engaging communities, and collaborating with the government are also vital. Analysis of interviews revealed several critical areas that organisations prioritise for long-term impact and sustainability. Key themes emerged through common words and analysis codes, highlighting their importance in the family giving sector.



Financial Sustainability was a prominent theme, noted by 4 participants. Foundations like Samrawit Foundation, Elevate Trust, and Palm House Foundation emphasise the need for financial sustainability. They achieve this through self-financing, external funding, and diversifying income sources to ensure the longevity of their philanthropic work. This focus underscores the necessity of stable resources for supporting long-term objectives.



3 participants identified long-Term Impact. Organisations such as Dr. Ambachew Mekonnen Foundation, Meseret Foundation, Elevate Trust, and Wangari Maathai Foundation aim to create lasting positive effects on individuals and communities. Their efforts involve empowering beneficiaries in ways that promote sustainable progress rather than short-term relief, reflecting their commitment to durable change.



3 participants highlighted resource Management. Ayzon Foundation, Elevate Trust, Ratansi Family, and Palm House Foundation stress the importance of careful planning and strategic resource allocation. Efficient use of resources is crucial for sustaining philanthropic activities and maximising their impact.



Environmental Considerations were noted by 2 participants. Organisations like Dr. Ambachew Mekonnen Foundation, Ayzon Foundation, and Wangari Maathai Foundation incorporate environmental sustainability into their practices. Initiatives include eco-friendly practices and raising climate change awareness, demonstrating a broader awareness of systemic change.



2 participants emphasised sustainability Frameworks in Governance Structures. For instance, the Samrawit Foundation integrates sustainability frameworks into its constitution, ensuring continuity through leadership transitions. This strategic governance approach is vital for maintaining operations and achieving long-term goals.



1 participant noted community Involvement and Transition.

Organisations like Mama Wellness Foundation, Agape Restoration Foundation, and CGC Uganda focus on engaging local communities and transitioning to NGO models. Their strategies include building volunteer teams and engaging boards to address challenges proactively.



1 participant highlighted **Government Collaboration and Partnerships. Foundations** such as Normal Wellness Community Center and Mama Wellness Foundation emphasise working with government entities to integrate their models into public programs. This collaboration ensures community acceptance and contributes to long-term sustainability.

Summary of Key sustainability models

Sustainability Models	Number of respondents	Percentage
Focus on Financial Sustainability	4	22.2%
Design programs for Long-Term Impact	3	16.7%
Systems for Resource Management	3	16.7%
Community Sustainability	2	11.1%
Emphasis on Environmental Considerations	2	11.1%
Sustainability Frameworks in Governance Structures	2	11.1%
Community Involvement and Transition	1	5.6%
Government Collaboration and Partnerships	1	5.6%

Table 4. Key sustainability models practised by foundations

3.7. Succession Planning

Succession planning emerged as a crucial element in family giving, ensuring continuity across generations while addressing governance challenges, such as time limits for board members. Based on the analysis of the study participants, several key themes were identified from the data.



Generational Transition was the most commonly cited theme, mentioned by 17 participants. The Rattansi Foundation (Kenya) was highlighted as emphasising the importance of smooth leadership transitions to maintain continuity and uphold a shared vision across family members.



11 participants referenced structured Succession Planning, underscoring the need for clear, organised plans. The Jakaya Kikwete Foundation (Tanzania) provides a key example, implementing defined board terms and a formal succession framework to ensure leadership continuity.



Thirteen participants stressed the **Preservation of Values**, focusing on the transmission of core values from founders to future generations. For instance, the Palm House Foundation (Kenya) preserves its founding principles through mentorship and the guidance of young beneficiaries.



8 participants mentioned board Involvement in succession planning, highlighting the role of trustees or directors in ensuring stable leadership transitions. The Meseret Foundation (Ethiopia) exemplifies this with its board's active involvement in leadership and governance.



7 participants, who emphasised the importance of preparing future generations for leadership roles, discussed training and Education. The Manu Chandaria Foundation (Kenya), in particular, prioritises education as a key strategy for building leadership capacity within families.



14 participants referenced Leadership Dynamics, with many focusing on the importance of collaborative decision-making. The Ayzon Foundation (Ethiopia) illustrates this through its commitment to shared leadership, avoiding the concentration of power within a single individual.



Five participants mentioned challenges related to **time limits** for board roles. The Mwalimu Nyerere Foundation (Tanzania) noted the need to address these governance issues to enable smooth transitions.



Lastly, **5 participants cited Mentorship Programs** as a strategy for leadership development. Agape Restoration (Uganda) integrates mentorship and volunteer involvement into its succession planning efforts.

Key elements necessary for successful Succession Planning

Succession element	# of Respondents	Percentage
Generational Transition	17	100%
Structured succession planning	11	64.7%
Preservation of values of founder	13	76.5%
Training and education as focus areas	7	4.2%
Development of Management capabilities (Leadership Dynamics)	14	82.4%
Board involvement	8	47.1%
Governance transitions(Board term limits)	5	29.4%
Mentorship Programs	5	29.4%

Table 5. Key sustainability models practised by foundations

3.8. Legacy and Values

Family foundations are driven by the legacies and values of their founders. The emphasis is on preserving and perpetuating the original vision, often centred around creating impact beyond current generation, fostering an identity based on philanthropy, community impact or development, peace, and unity, leaving a memorable legacy, empowerment of marginalised and vulnerable groups.



Intergenerational impact was a recurring theme, mentioned by 9 participants. The Ambachew Foundation (Ethiopia) for example focuses on training and motivating younger generations, fostering a long-term commitment to national development.



Philanthropic Identity was cited by 6 participants, such as the Elevate Child Trust (Kenya), which is developing a distinct philanthropic identity through its network of “friends of elevate,” highlighting the organisation’s core values and community support.



The **Demonstration of Success** was emphasised by 5 participants, such as the Meseret Foundation, which values individual empowerment stories alongside traditional metrics, showcasing a qualitative approach to assessing legacy and impact.



Leaving a Legacy within Family Foundations was a priority for 8 participants. The Karimjee Foundation (Kenya) exemplifies this by focusing on transforming lives, promoting education, innovation, and upholding family values, underscoring its long-term societal impact.



3 participants mentioned a Vision for Impact Beyond Borders, with the Ruge Mutahaba Foundation (Tanzania) aiming to expand its work internationally, leveraging technology to create change across various economies.



Six participants expressed a **Commitment to Societal Challenges**, as seen with the Mwalimu Nyerere Foundation (Tanzania), which focuses on peace, unity, and people-centred development in Africa, supported by strong leadership within its board of trustees.



A **Legacy of Positive Change and Innovation** was cited by 2 participants, such as the Jakaya Kikwete Foundation (Tanzania), which prioritises youth empowerment and maternal health through collaborative efforts and partnerships.



Empowerment of Marginalised Groups was a focus for 5 participants, including the Nnabagereka Development Foundation (Uganda), which aims to empower vulnerable populations, particularly women, youth, and the girl child, through cultural interventions.



Two participants mentioned **Awareness and Inclusivity for Disabilities**, exemplified by the Mukisa Foundation, which seeks to fight stigma and increase societal inclusion for children with disabilities.



Lastly, 3 participants highlighted **Maternal and Child Health**, with the Mama Wellness Foundation (Tanzania) aspiring to build a legacy around improving health outcomes for mothers and children through community programs and facility upgrades.

Founder Legacies as a driver for family giving

Legacies	# of Respondents	Percentage
Intergenerational Impact	9	50%
Philanthropic Identity	6	33.3%
Demonstration of success	5	27.8%
Leaving a Legacy within Family Foundations	8	44.4%
Vision for Impact beyond borders	3	16.7%
Commitment to Societal Challenges	6	33.3%
Legacy of Positive Change and Innovation	2	11.1%
Empowerment of Marginalised Groups	5	27.8%
Awareness and Inclusivity for Disabilities	2	11.1%
Promoting Maternal and Child Health	3	16.7%

Table 6. Founder Legacies as a driver for family giving

3.9. Philanthropic Identity and Trends



Foundations derive their philanthropic identity from the principles established by their founders. A notable trend is the emphasis on a philanthropic identity rooted in cultural values, traditions, and the aspirations of founders, identified by 5 participants. For example, the Ambachew Foundation and Ayzon Foundation stress a deep connection to East African culture, emphasising community duty and reciprocity.



Another significant trend is the increased engagement of families and the mobilisation of private enterprises to support social impact, highlighted by 8 participants. Foundations such as Vjoo Ratansi, IGC, and Nabagereka Foundation exemplify this trend by focusing on holistic philanthropy, sustainability, and the integration of technology and cultural elements.



3 participants noted prioritising education as a key focus area. Foundations like Vjoo Ratansi emphasise education as a crucial means of sustainable community development, viewing it as an investment in future generations and a key factor in empowering individuals.



Adaptability and innovation emerged as a crucial trait, identified by 2 participants. This trend reflects the need for foundations to address emerging challenges and opportunities effectively, adapting their strategies to the evolving philanthropic landscape.



2 participants also highlighted inclusivity, with foundations like Mama Wellness and Mukisa Foundation showing trends towards comprehensive community outreach and inclusive education for children living with disabilities. These efforts include collaborating with government facilities, engaging community leaders, and conducting workshops to enhance awareness and acceptance of family giving traditions.

Additional emerging trends, though not quantified, include a shift towards domestic philanthropy, integration of youth in philanthropic efforts, advocacy for changes in economic models to ensure more sustainable and inclusive development, and a focus on governance reforms. These trends indicate a growing recognition of the need for more locally-driven philanthropic practices, youth engagement, and improved governance structures.

Emerging themes on family philanthropic Identity and Trends

Identities and trends	# of Respondents	Percentage
Philanthropic Identity rooted in cultural values, traditions, and aspiration of founders	5	27.8%
Increased family engagement mobilisation of private enterprises to support social impact	8	44.4%
Prioritisation of education as a focus area	3	16.7%
Adaptability & Innovation	2	11.1%
Inclusivity	2	11.1%

Table 7. Family philanthropic Identity and Trends

3.10. Challenges in Family Giving in East Africa

Family foundations encounter a range of challenges as they strive to fulfil their mandates. One significant challenge is the heavy reliance on funding from founders. Many foundations face difficulties due to this dependency, which limits their ability to diversify and sustain their operations effectively. For instance, Ambachew Foundation and Samrawit Foundation Ethiopia both struggle with securing sufficient financial support, underscoring the need for recognition and local support to overcome this hurdle.

Another prevalent issue is the limited success in amplifying domestic philanthropy. Foundations report frustration with the reluctance of local businesses and individuals to contribute to community work, impeding efforts to foster a culture of local giving. Youth unemployment also poses a substantial challenge. The disconnect between youth aspirations and available job opportunities, exacerbated by limited job creation, highlights the need for philanthropic initiatives to address meaningful employment for the youth.

Governance and succession challenges further complicate the landscape. Weak governance structures, including inadequate succession planning and time limits for board members, are identified as areas needing improvement. Foundations emphasise the importance of establishing robust governance practices to ensure effective management and continuity.

Difficulty in securing financial assistance is another common challenge. Many foundations, including Elevate Child Trust and Mwalimu Nyerere Foundation, face obstacles such as obtaining external funding, convincing wealthy individuals to contribute, and navigating bureaucratic hurdles in traditional fundraising.

Resource constraints and lack of internal capacity are also notable issues. Foundations like Jakaya Kikwete Foundation and Mwalimu Nyerere Foundation experience challenges due to limited financial and human resources, impacting their ability to maintain independence and pursue their philanthropic agendas effectively.

The need for collaboration and partnership is critical. Foundations recognize the importance of working together and mobilising resources across sectors to address challenges. For example, Meseret Foundation emphasises the necessity of collaboration to tackle family giving challenges. Community resistance and misconceptions are further hurdles. Foundations like Nnabagereka Development Foundation and Mukisa Foundation face initial resistance or lack of appreciation for their interventions, highlighting the need to manage cultural sensitivities and stigma related to disabilities.

Sustainability concerns are prevalent, especially in the wake of the COVID-19 pandemic. Foundations like Concern for the Girl Child (CGC) Uganda express challenges related to ensuring

communities understand the long-term benefits of interventions, rather than perceiving them as mere handouts.

Challenges specific to certain focus areas, such as education, conservation, and gender equality, are also noted. Foundations like Mo Dewji Foundation and Elevate Child Trust discuss issues related to job creation, gender equality, and the impact of NGOs on community perceptions.

Lastly, the lack of governance and administrative support poses a challenge. Foundations highlight the need for good governance practices, including the development of written policies and addressing conflicts of interest to ensure effective philanthropy.



Figure 4. Challenges to Family Philanthropy

3.11. Opportunities in Family Giving in East Africa



Strategic Partnerships and Diverse Fundraising Avenues were noted by 4 respondents. These opportunities involve advocating for economic development models that create regional value chains to foster job creation and retaining economic benefits within the region. Diversifying funding sources beyond external donors and exploring innovative income-generating projects are also seen as crucial for enhancing financial stability. For example, the Ambachew Foundation in Ethiopia recognizes the potential in forming strategic partnerships and diversifying fundraising avenues.



3 respondents highlighted Holistic Perspectives and Collaboration. These include creating an enabling environment for philanthropy through favourable policies, tax incentives, and public-private partnerships to attract more individuals and businesses. The Meseret Foundation in Ethiopia illustrates this approach by integrating social, economic, and environmental factors and emphasising collaboration and resource sharing.



Empowering Local Communities and Promoting Self-Sustainability were mentioned by 3 respondents - focusing on empowering local communities and fostering entrepreneurship, as demonstrated by the Ayzon Foundation in Ethiopia, which promotes self-sustainability through business initiatives.



2 respondents highlighted increased Awareness, Education, and Adaptability - boosting awareness and education and adapting to emerging trends in philanthropy. Manu Chandaria in Kenya is keen on community awareness and education, while Vjoo Ratansi focuses on adaptability, youth empowerment, tech advancements.



2 respondents identified strengthening Domestic Philanthropy and Sustainable Funding. Efforts to enhance domestic philanthropy, encourage local business support, and utilise physical assets for sustainable funding are crucial. The Mwalimu Nyerere Foundation in Tanzania seeks to strengthen domestic philanthropy and leverage physical assets for sustainable funding.



1 respondent noted fostering Collaboration and Leveraging Networks. Engaging with philanthropic networks, sharing experiences, and forming partnerships with supportive organisations can enhance philanthropic impact. The Agape Restoration Foundation in Uganda and the Palm House Foundation in Kenya see opportunities in collaboration and establishing endowments.



1 respondent mentioned promoting Social Entrepreneurship and Comprehensive Understanding. This includes reshaping perceptions of philanthropy and investing in social entrepreneurship, as highlighted by the Jakaya Kikwete Foundation in Tanzania and the Ruge Mutahaba Foundation.



Government Collaboration for Sustainability was identified by 1 respondent. Collaborating with the government to sustain community health programs and address resource gaps is a crucial opportunity, as seen with the Mama Wellness Foundation in Uganda.

Strategies to promote Family Giving in East Africa

Strategies to promote Family Giving	Pax	%
Strategic Partnerships and Diverse Fundraising Avenues	4	22.2%
Holistic Perspectives and Collaboration	3	44.4%
Empowering Local Communities and Promoting Self-Sustainability	3	16.7%
Increased Awareness, Education, and Adaptability	2	11.1%
Strengthening Domestic Philanthropy and Sustainable Funding	2	11.1%
Fostering Collaboration and Leveraging Networks	1	5.6%
Promoting Social Entrepreneurship and Comprehensive Understanding	1	5.6%
Government Collaboration for Sustainability	1	5.6%

Table 8. Strategies to promote Family Giving in East Africa

A conceptual image for thematic analysis. It features a staircase of four wooden blocks of increasing height from left to right. On top of each block is a white chess piece: a pawn on the first, a knight on the second, a bishop on the third, and a king on the fourth. A fifth white chess piece, a pawn, is on the floor to the left of the first block. The background is a dark, textured grey. A white horizontal bar with rounded ends is positioned across the middle of the image, containing the text 'THEMATIC ANALYSIS' in bold red capital letters.

THEMATIC ANALYSIS

CHAPTER FOUR:

THEMATIC ANALYSIS

4.1. Introduction

This chapter provides a more detailed analysis and interpretation of the emerging themes from the study. This is based on an in-depth analysis of the feedback emerging from the interviews.

4.2. Structures, Values, and Operational Strategies of Family Foundations

This study reveals a deep commitment to legacy and communal responsibility, coupled with a growing need for diversified funding and effective governance. The aim is to explore these aspects in detail, highlighting the structures, values, and operational strategies of philanthropic foundations across Kenya, Tanzania, Ethiopia, and Uganda.

4.2.1. Structures and Values

Philanthropic structures in East Africa are often characterised by traditional communal practices and modern approaches. For instance, the concept of “harambee” in Kenya, along with similar practices in Tanzania, Ethiopia, and Uganda, illustrates a shared commitment to collaborative community support. These practices emphasise the importance of communal responsibility and interconnectedness, reflecting the values inherent in family giving traditions. The study underscores how these traditions influence the operational strategies of foundations, reinforcing the role of communal efforts in addressing societal needs.

4.2.2. Operational Strategies

Philanthropic foundations in the region are increasingly focusing on financial sustainability and effective governance. Foundations such as the Samrawit Foundation and Elevate Child Trust are adopting diverse fundraising strategies and self-financing models to reduce reliance on external donors. This focus on sustainability is crucial for long-term impact and stability. Additionally, governance and succession planning are areas of concern. Many foundations, including the Mwalimu Nyerere Foundation and the Jakaya Kikwete Foundation, face challenges related to weak governance structures and inadequate succession planning, which can affect their long-term effectiveness.

4.2.2 Sustainability Models

The emphasis on sustainability is evident in various strategies employed by foundations. There is a growing trend towards integrating environmental considerations into philanthropic efforts, as seen with organisations like the Wangari Maathai Foundation - who are adopting eco-friendly practices, policies, frameworks and holistic approaches that account for environmental, social, and economic factors.

4.2.3. Opportunities for Growth

Opportunities for enhancing family giving in Eastern Africa include fostering strategic partnerships, promoting local philanthropy, and empowering communities. By addressing these areas, foundations can better navigate sector challenges and increase their impact. The study highlights the importance of adapting traditional values to modern strategies, creating a more robust and sustainable philanthropic sector in the region.

Key sustainability elements for family foundations

Elements	Description	Variables from Literature Review and Study Findings
Financial Sustainability	Prioritising strategies for long-term financial continuity.	Self-financing Seeking external funding Diversifying funding sources Strategies for long-term continuity
Long-Term Impact	Emphasising lasting positive effects, empowering individuals, and communities for sustainable progress.	Creating lasting positive effects Empowering individuals and communities Sustainable progress
Resource Management	Emphasising judicious resource management through careful planning, allocation, and strategic use.	Judicious resource management Careful planning, allocation, and strategic use of resources
Environmental Considerations	Integrating environmental sustainability into family giving, including eco-friendly practices, climate change awareness, and holistic approaches.	Integrating environmental sustainability into family giving Eco-friendly practices Climate change awareness Holistic approaches considering environmental, social, and economic aspects
Sustainability Frameworks in Governance Structures	Outlining sustainability frameworks in constitutions for long-term continuity.	Sustainability framework outlined in the constitution Plans for continuity even if the founder retires Importance of strategic frameworks for long-term sustainability
Community Involvement and Transition	Focusing on community involvement and transitioning to an NGO model, including engaging local communities, and creating structures for seamless continuity.	Community involvement and transitioning to an NGO model Engaging local communities Building volunteer teams Creating structures like boards for seamless continuity
Government Collaboration and Partnerships	Emphasising collaboration with the government for sustainability, integrating the organisation's model into government programs.	Collaboration with the government for sustainability Integrating the organisation's model into government programs Ensuring community acceptance for long-term sustainability

Table 9. Key success factors for sustainability of family foundation

4.3. Impact of family giving in the East African context

4.3.1. Assessment of the Impact of Family Giving on East African Society

Family giving in Eastern Africa has a profound impact on various societal aspects, including cultural preservation, education, healthcare, environmental sustainability, and community development. The findings from the study highlight how philanthropic efforts in this region contribute to these domains and outline the broader implications of family foundations' activities.

4.3.2. Cultural Preservation

Family foundations play a critical role in preserving cultural heritage and promoting traditional values. By supporting initiatives that celebrate local customs and traditions, such as festivals, arts, and historical conservation, these foundations help maintain cultural identity amidst rapid modernization. For instance, foundations like the Nnabagereka Development Foundation in Uganda emphasise cultural engagement, fostering an appreciation for traditional practices while integrating them into contemporary development projects. This approach not only reinforces cultural pride but also enhances communal bonds.

4.3.3. Education

The impact of family giving on education is substantial, with foundations investing in educational infrastructure, scholarships, and capacity-building programs. Foundations such as the Manu Chandaria Foundation focus on educational initiatives, providing resources and opportunities for students and educators. These investments contribute to improving educational outcomes, increasing access to quality education, and fostering a skilled workforce. By supporting educational programs, family foundations help bridge gaps in the education system and empower future generations with the knowledge and skills needed for personal and professional growth.

4.3.4. Healthcare

Family foundations contribute significantly to healthcare by funding medical facilities, health programs, and research. For example, organisations like the Wangari Maathai Foundation address healthcare challenges through initiatives that improve access to medical services and promote public health awareness. These efforts are crucial in combating diseases, improving health outcomes, and enhancing the quality of life for vulnerable populations. Philanthropic support also aids in the development of healthcare infrastructure and the training of medical professionals, thereby strengthening the overall healthcare system.

4.3.5. Environmental Sustainability

Environmental sustainability is increasingly becoming a focus for family foundations, with efforts directed towards conservation, eco-friendly practices, and awareness campaigns. Foundations such as the Dr. Ambachew Mekonnen Foundation emphasise integrating environmental considerations into their projects, supporting initiatives like tree planting, waste management, and sustainable resource use. By promoting environmental stewardship, these foundations help address pressing ecological challenges and contribute to the long-term health of the environment.

4.3.6. Community Development

Community development is a central theme in family giving, with foundations working to address socio-economic challenges and enhance the well-being of communities. Through investments in infrastructure, social services, and economic opportunities, family foundations like the Ayzon Foundation contribute to community growth and resilience. Initiatives aimed at improving livelihoods, fostering entrepreneurship, and supporting local projects help build stronger, more self-sufficient communities. By addressing both immediate needs and long-term development goals, family foundations play a pivotal role in shaping the social and economic landscape of East Africa.

4.4. Navigating succession and intergenerational transitions

Family foundations in East Africa grapple with the complex task of managing succession and intergenerational transitions to maintain the continuity and effectiveness of their philanthropy. The study reveals several key strategies and challenges these foundations face as they navigate these transitions.

4.4.1. Generational Transition

A central theme in the study is the importance of seamless generational transitions. Foundations such as the Ratansi Foundation underscore the critical nature of ensuring that leadership changes are smooth and well-managed. This focus on continuity helps maintain the foundation's mission and ensures that the philanthropic efforts remain aligned with the original vision, even as leadership evolves.

4.4.2. Structured Succession Planning

Structured succession planning is essential to maintaining stability within family foundations. Foundations like the Jakaya Kikwete Foundation emphasise implementing clear succession plans as a strategy for effective leadership transitions. These plans involve identifying and preparing future leaders, ensuring that the foundation's goals are pursued consistently and effectively.

4.4.3. Preservation of Values

Preserving the core values established by the founders is another crucial aspect. Foundations like the Palm House Foundation emphasise the importance of maintaining these values across generations. This dedication to core principles helps ensure that the foundation's mission continues to reflect its original intentions, reinforcing its philanthropic identity and legacy.

4.4.4. Board Involvement

Board involvement in succession planning is highlighted as an important factor. For example, the Meseret Foundation illustrates how active board participation can contribute to effective succession processes. The board's role in providing oversight and strategic guidance is essential for managing leadership transitions and maintaining organisational stability.

4.4.5. Training and Education

Investing in the training and education of future leaders is seen as essential for ensuring the foundation's long-term success. Foundations like the Manu Chandaria Foundation emphasise the need for capacity building through educational initiatives. By equipping emerging leaders with the necessary skills and knowledge, these foundations aim to sustain their philanthropic efforts across generations.

4.4.6. Leadership Dynamics

Collaborative decision-making within family foundations is increasingly recognized as beneficial. Foundations like the Ayzon Foundation discuss the advantages of collaborative leadership, where multiple perspectives are considered in decision-making processes. This approach helps address complex challenges and promotes a more inclusive environment, contributing to the foundation's effectiveness.

4.4.7. Challenges in Succession Planning

Challenges in succession planning are acknowledged by some foundations. For instance, the Mwalimu Nyerere Foundation highlights difficulties related to governance and succession, such as the absence of time limits for board members. These challenges underscore the need for improved governance structures to facilitate smoother leadership transitions.

4.4.8 Mentorship Programs

Mentorship is identified as a key strategy for succession planning. Several foundations incorporate mentorship programs to prepare emerging leaders for future roles. These programs provide guidance and support, helping to ensure that the foundation's mission and activities are effectively carried forward.

From the data collected, key pillars for Successful Succession Planning emerge; Vision and Mission Alignment, Professional Advisors and External Input, Communication and Transparency, Effective Governance Structure and Leadership Development.

Pillars for succession planning

Pillars	Description	Related Variables from Text
Vision and Mission Alignment	Ensure that the successors understand and align with the founder or family's philanthropic vision and mission.	<ul style="list-style-type: none"> ◆ "Potential for a seamless transition of leadership" ◆ "Continuity of the family's philanthropic legacy" ◆ "Engage the next generation" ◆ "Shared purpose and commitment to philanthropic values"
Leadership Development	Identify and prepare future leaders within the family or foundation who can take on key roles in the philanthropic organisation.	<ul style="list-style-type: none"> ◆ "Seamless transition of leadership" ◆ "Engaging the next generation" ◆ "Intergenerational collaboration" ◆ "Shared purpose and commitment to philanthropic values" ◆ "Leverage diverse skills and interests of each generation" ◆ "Collaborative decision-making in leadership" ◆ "Investing in education for capacity building" ◆ "Mentorship programs for smooth leadership transitions"
Governance Structure	Establish a robust governance structure that supports effective decision-making and leadership transition.	<ul style="list-style-type: none"> ◆ "Balancing tradition with innovation" ◆ "Maintaining philanthropic identity" ◆ "Adapting to evolving societal needs" ◆ "Addressing conflicts within the family" ◆ "Open communication and finding common ground" ◆ "Fear of losing control and uncertainty associated with leadership transitions" ◆ "Involvement of the board in succession planning" ◆ "Acknowledgment of challenges in succession planning, including governance concerns"

<p>Communication and Transparency</p>	<p>Foster open communication and transparency to build trust and ensure a shared understanding of the founder or family's philanthropic goals</p>	<ul style="list-style-type: none"> ◆ "Open communication" ◆ "Addressing conflicts with open communication" - ◆ "Transparency in financial and impact information sharing"
<p>Professional Advisors and External Input</p>	<p>Seek external expertise and advice to enhance the effectiveness of succession planning. Includes training and education</p>	<ul style="list-style-type: none"> ◆ "Balancing tradition with innovation" ◆ "Fear of losing control and uncertainty associated with leadership transitions" ◆ "Engaging professional advisors for legal compliance" ◆ "External advisory board with seasoned philanthropists" ◆ "Consulting legal experts for compliance with local family philanthropy laws" ◆ "Adaptability to regulatory changes"

Table 10. Pillars for Successful Succession Planning

4.5. Obstacles to family giving

Family giving initiatives in Eastern Africa face a complex array of challenges that shape their operational effectiveness and sustainability. These challenges reveal critical areas for improvement and offer valuable opportunities for growth.



One significant challenge is **heavy reliance on funding from founders**. Many family foundations depend predominantly on the financial support of their founders, which can limit their financial stability and long-term impact. To address this, it is essential for foundations to diversify their funding sources, reducing their dependence on any single contributor and thereby enhancing their resilience and sustainability.



Limited domestic philanthropy represents another formidable challenge. There is a clear need for increased local engagement to foster a culture of giving within the community. Efforts to encourage local entities to contribute to philanthropic activities are crucial for developing a more robust and self-sustaining charitable sector.



Youth unemployment is also a critical issue that family foundations need to tackle. The challenge lies in effectively engaging and empowering the younger generation. Foundations can make a meaningful impact by investing in educational and employment opportunities for youth, thereby contributing to broader societal benefits and helping to address one of the region's pressing social issues.



Governance and succession planning present ongoing challenges for family foundations. Effective governance structures and clear succession plans are vital for ensuring stability and continuity in leadership. Foundations must focus on developing strategic plans that address these areas, maintaining high standards of governance, and preparing for smooth transitions in leadership.



Securing financial assistance remains a common hurdle. Many family foundations struggle to obtain external support, which underscores the need for innovative fundraising strategies. Exploring diverse funding avenues and forming strategic partnerships can help overcome financial barriers and support the sustainability of philanthropic efforts.



Resource constraints and a lack of internal capacity further complicate the operation of family foundations. Building internal resilience through better resource management and capacity development is crucial for addressing these foundational challenges and ensuring effective operations.



Collaboration and partnerships are essential for enhancing the impact of family giving initiatives. Foundations must actively seek and build alliances to leverage resources more effectively and amplify their philanthropic efforts. Strengthening these relationships can lead to more successful and far-reaching initiatives.



Community resistance and cultural misconceptions also pose challenges. To overcome these obstacles, family foundations must engage with local communities in a culturally sensitive manner. Understanding and aligning with community values and traditions is key to reducing resistance and fostering acceptance of philanthropic interventions.

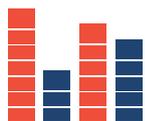


Finally, **sustainability concerns** highlight the need for long-term viability strategies. Foundations must develop comprehensive approaches to ensure their efforts remain effective and impactful over time. Addressing these sustainability challenges is essential for maintaining the long-term success of philanthropic initiatives.

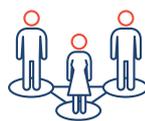


4.6. Emerging Trends in family giving traditions

Family giving traditions in Eastern Africa are marked by a dynamic and evolving landscape, reflecting a complex interplay of cultural values, educational aspirations, and a commitment to sustainable impact. Recent trends and innovative approaches within this philanthropic space illustrate how foundations are adapting to meet emerging needs and leverage new opportunities.



Diverse Trends Shaping Family Giving highlights the agility and versatility of family foundations. These organisations are increasingly evolving to address both external and internal challenges by incorporating a wide range of focus areas such as education, adaptability, sustainability, youth empowerment, and technology integration. This diverse approach allows foundations to navigate a broad spectrum of philanthropic opportunities and challenges, demonstrating a flexible and responsive strategy to creating lasting positive change.



The **importance of cultural and community engagement** is another significant trend. Many foundations, rooted in Eastern African cultural values, emphasise a philanthropic identity that deeply connects to the region's heritage. This cultural resonance is exemplified by organisations like Ayzon Foundation, which fosters a holistic approach to giving that considers cultural, community, and generational aspects. Their efforts go beyond mere financial support to include community engagement initiatives that promote inclusivity and strengthen local ties.



Educational excellence for sustainable development is a key focus for several foundations, reflecting the recognition of education as a powerful catalyst for positive, long-term change. Foundations invest strategically in educational initiatives, viewing them as essential for driving community development and achieving sustainable progress. This commitment underscores the role of education in fostering enduring impact within the region.



There is also a **shift towards domestic philanthropy and advocacy**, with foundations increasingly focusing on securing local funding sources. This shift is driven by the need for greater self-sustainability and a push for changes in economic models that support more sustainable development. Foundations are advocating for domestic contributions and developing strategies to reduce reliance on external funding, thus enhancing their financial stability and impact.



Youth integration in philanthropy represents another important trend. Foundations are actively involving young people in their initiatives, addressing youth unemployment challenges while fostering a sense of responsibility and engagement among the younger generation. This trend reflects a broader recognition of the need to empower youth and integrate their perspectives into philanthropic efforts.



Finally, the embrace of **sustainability, technology, and adaptability** is a notable trend among family foundations. Recognizing the importance of forward-looking initiatives, these organisations are leveraging sustainable practices, technological advancements, and adaptable strategies to navigate the evolving philanthropic landscape. This integration of innovative approaches positions foundations to better respond to emerging needs and opportunities, ensuring their continued relevance and effectiveness.

4.7. Legacies that founders yearn to leave.

In Eastern Africa, the founders of family foundations aspire to leave profound and lasting legacies that resonate through various aspects of their philanthropic efforts. These legacies are shaped by a commitment to intergenerational impact, the cultivation of unique philanthropic identities, and addressing both local and global challenges.



Intergenerational Impact is a central theme, with many family foundations prioritising the creation of lasting effects that extend beyond their lifetimes. This commitment reflects a broader understanding within the family of the importance of ensuring that philanthropic efforts endure and continue to benefit future generations.



Philanthropic Identity is another crucial element, with numerous foundations actively developing and nurturing their unique philanthropic identities. This focus on cultivating a distinctive and impactful presence in the philanthropic landscape underscores the importance of standing out and making a significant mark within the sector.



Demonstration of Success among family foundations often transcends mere numerical metrics. Instead, many foundations emphasise qualitative measures to assess their impact. This approach aligns with a qualitative assessment strategy in family giving literature, highlighting a more nuanced understanding of success and the broader implications of their work.



The aspiration to **Leave a Legacy within a Family Foundation** is evident as many foundations articulate their desire to create a lasting imprint. This reflects a recognition of the varied and rich legacies that family foundations can build, contributing to their unique and multifaceted tapestry of impact.



Vision for Impact Beyond Borders is evident in the ambitions of some foundations that seek to address challenges on an international scale. This global perspective reflects a growing trend among family foundations to extend their influence and contribute to solutions for global issues.



Commitment to Societal Challenges is another significant aspect of the legacies that family foundations aim to leave. By focusing on pressing societal issues, these foundations demonstrate a dedication to making a meaningful and positive difference in addressing critical challenges.



The **Legacy of Positive Change and Innovation** is particularly noteworthy among foundations that prioritise driving societal transformation through innovative approaches. This emphasis on fostering change and innovation underscores the role of family foundations as catalysts for progress and development.



Empowerment of Marginalised Groups is a key focus for many foundations, reflecting their commitment to social equity and inclusivity. By concentrating on empowering marginalised communities, these foundations contribute to broader social justice and equity goals.



Increased **Awareness and Inclusivity for Disabilities** is a targeted effort by some family foundations, highlighting their commitment to fostering greater awareness and inclusivity for individuals with disabilities. This focus aligns with broader efforts to address and integrate the needs of disabled persons within the philanthropic landscape.



Finally, the impact on **Maternal and Child Health** is highlighted by foundations that emphasise their contributions to vital health initiatives. This focus on improving maternal and child health underscores the importance of addressing critical health issues as part of their philanthropic legacy.

Legacy and Values in Family Philanthropy

Legacy and Values	Description	Evidence from Literature Review and interview findings
Intergenerational Impact	Emphasising the commitment to creating a lasting effect that transcends generations	<ul style="list-style-type: none"> ◆ "Commitment to creating a lasting effect transcending generations" ◆ "Broader understanding of multi-generational effects in family giving"
Philanthropic Identity	Actively cultivating a distinctive and impactful presence in the philanthropic landscape.	<ul style="list-style-type: none"> ◆ "Actively cultivating philanthropic identities" ◆ "Showcasing commitment to a distinctive and impactful presence" ◆ "Recognized importance of a unique philanthropic identity for family foundations"
Demonstration of Success	Going beyond numerical metrics, focusing on qualitative measures to demonstrate success.	<ul style="list-style-type: none"> ◆ "Qualitative assessment strategy in family giving literature" - ◆ "Focus on qualitative measures to demonstrate success"
Legacy within a Family Foundation	Articulating various aspects of legacies, reflecting a desire to leave a lasting imprint within the family foundation.	<ul style="list-style-type: none"> ◆ "Articulating different aspects of legacies" - ◆ "Desire to leave a lasting imprint within the family foundation" ◆ "Acknowledgment of diverse legacies within family foundations"
Vision for Impact Beyond Borders	Envisioning impact beyond borders, highlighting a global perspective and a commitment to addressing challenges on an international scale.	<ul style="list-style-type: none"> ◆ "Envisioning impact beyond borders" ◆ "Showcasing a global perspective" - ◆ "Commitment to addressing challenges on an international scale" ◆ "Growing trend of family foundations expressing global aspirations"
Commitment to Societal Challenges	Focusing on addressing societal challenges, emphasising dedication to making a meaningful impact on critical issues.	<ul style="list-style-type: none"> ◆ "Focusing on addressing societal challenges" ◆ "Dedication to making a meaningful impact on critical issues" ◆ "Alignment with broader literature on family foundations' role in addressing pressing societal concerns"
Legacy of Positive Change and Innovation	Emphasising a legacy of positive change and innovation, highlighting the role as drivers of innovation in societal transformation.	<ul style="list-style-type: none"> ◆ "Emphasising a legacy of positive change and innovation" ◆ "Role as drivers of innovation in societal transformation" ◆ "Alignment with studies recognizing family foundations as agents of positive and innovative societal change"

Empowerment of Marginalised Groups	Concentrating on empowering marginalised groups, demonstrating a commitment to social equity and inclusivity	<ul style="list-style-type: none"> ◆ "Concentrating on empowering marginalised groups" ◆ "Demonstrating a commitment to social equity and inclusivity" ◆ "Resonance with literature emphasising the role of family foundations in contributing to social equity"
Awareness and Inclusivity for Disabilities	Targeting awareness and inclusivity for disabilities. Displaying a commitment to fostering awareness and inclusivity in philanthropic endeavours.	<ul style="list-style-type: none"> ◆ "Targeting awareness and inclusivity for disabilities" ◆ "Commitment to fostering awareness and inclusivity in philanthropic endeavours" ◆ "Alignment with research highlighting the contributions of family foundations to inclusivity, particularly in addressing issues related to disabilities"
Impact on Maternal and Child Health	Highlighting impact on maternal and child health, emphasising contributions to vital health initiatives.	<ul style="list-style-type: none"> ◆ "Highlighting impact on maternal and child health" ◆ "Emphasis on contributions to vital health initiatives" ◆ "Alignment with broader studies recognizing family foundations as significant contributors to initiatives focused on maternal and child health"
Legacy and Aspirations in Family Giving	Playing a pivotal role in shaping philanthropic endeavours, viewed as a lasting legacy, a means to create positive change, and an investment in the future.	<ul style="list-style-type: none"> ◆ "Playing a pivotal role in shaping philanthropic endeavours" ◆ "Viewed as a lasting legacy" ◆ "A means to create positive change and an investment in the future" ◆ "Unique cultural, historical, and societal perspectives influencing family giving across diverse nations" ◆ "Understanding distinctions for effective philanthropic strategies that resonate with values and needs of each community"

Table 12. Legacy and Values in Family Philanthropy

4.8. Opportunities for Family Giving in East Africa

The findings reveal several key opportunities for philanthropic organisations to enhance their impact. One significant theme is the importance of strategic partnerships and diverse fundraising avenues. Philanthropic entities have the potential to advocate for economic development models that create regional value chains, leading to job creation and retaining value within the region. Encouraging domestic philanthropy and exploring innovative income-generating projects can further enhance financial stability. The Ambachew Foundation in Ethiopia serves as an example, actively pursuing strategic partnerships and exploring diverse fundraising avenues.

Holistic perspectives and collaboration emerged as another critical theme. Creating an enabling environment for philanthropy through favourable policies, tax incentives, and public-private partnerships can attract more contributors to community development. The Meseret Foundation in Ethiopia exemplifies this approach, emphasising a holistic perspective that considers social, economic, and environmental factors, coupled with collaboration and resource sharing.

Empowering local communities and promoting self-sustainability are key opportunities identified and exemplified by the Ayzon Foundation in Ethiopia. This involves fostering entrepreneurship and supporting business initiatives within local communities.

Increased awareness and education for community well-being, present opportunities for impactful philanthropy. Manu Chandaria in Kenya underscores the importance of collective understanding and responsibility to give back to the community through increased awareness and education initiatives.

Adaptability, youth empowerment, and technology, highlight opportunities for family foundations. Vjoo Ratansi in Kenya suggests that adaptability to challenges, youth empowerment, and alignment with emerging trends in philanthropy can pave the way for impactful initiatives. The Wangari Maathai Foundation in Kenya addresses navigating donor-driven proposals and fundraising challenges, emphasising the importance of organisations adhering to their ideals rather than succumbing to external pressures.

Collaborations, endowment, and inspiring others represent opportunities identified by the Palm House Foundation in Kenya. This involves engaging in collaborations, establishing endowments, and inspiring the youth to embark on philanthropy early in life.

The Karimjee Foundation in Tanzania highlights opportunities in adaptability, collaboration, and youth empowerment through education. Similarly, the Mo Dewji Foundation in Tanzania emphasises the importance of empowering youth through education and entrepreneurship, leveraging technology, and fostering collaboration.

Strengthening domestic philanthropy and sustainable funding is a key focus for the Mwalimu Nyerere Foundation in Tanzania, advocating for local businesses and individuals to support community work and utilising physical assets for sustainable funding.

Engaging with philanthropic networks and partnerships is underscored by the Agape Restoration Foundation in Uganda, emphasising the value of sharing experiences and forming partnerships with organisations supporting philanthropic causes.

The Ruge Mutahaba Foundation in Tanzania identifies filling gaps through research and insights as an opportunity, emphasising the need for comprehensive research and insights in the philanthropic landscape.

Promoting a comprehensive understanding of philanthropy and encouraging investment in social entrepreneurship are highlighted by the Jakaya Kikwete Foundation in Tanzania, aiming to reshape perceptions and enhance the impact of philanthropic efforts.

Partnerships, cultural engagement, and increased support represent opportunities identified by the Nnabagereka Development Foundation in Uganda. This involves fostering partnerships with diverse institutions, engaging in cultural initiatives, and garnering increased support for philanthropic endeavours.

Expanding partnerships and leveraging cultural resources are key opportunities highlighted by the Mukisa Foundation in Uganda, emphasising the potential for increased awareness and acceptance of children with disabilities through cultural engagement.

Finally, government collaboration for sustainability is emphasised by the Mama Wellness Foundation in Uganda, highlighting the importance of collaborating with the government to ensure sustainability, particularly in community health programs, and addressing resource gaps. These diverse findings underscore the richness of opportunities within family giving traditions, drawing inspiration from existing studies and successful models in various regions.

Key Opportunities for Family Giving



Strategic Partnerships and Diverse Fundraising: Philanthropic organisations can strengthen financial stability through collaborations and innovative fundraising approaches, helping create regional value chains and job creation.



Holistic Approaches and Collaboration: A comprehensive perspective that includes social, economic, and environmental factors, alongside supportive policies, can foster greater impact through philanthropy.



Community Empowerment and Self-Sustainability: Fostering entrepreneurship and supporting local business initiatives can help empower communities and promote self-reliance.



Education, Awareness, and Youth Empowerment: Increasing awareness and focusing on youth education and entrepreneurship can significantly enhance community well-being and encourage the next generation's involvement in philanthropy.



Technology and Adaptability: Integrating technology and maintaining adaptability are key to ensuring that philanthropic initiatives stay relevant and effective.



Sustainable Funding and Domestic Philanthropy: Encouraging local businesses and individuals to support philanthropy, along with the strategic use of physical assets, can ensure more sustainable funding.



Government Collaboration and Cultural Engagement: Working with governments and leveraging cultural resources can ensure long-term sustainability and promote greater acceptance of philanthropic efforts.



Research and Insights for Growth: Conducting comprehensive research helps identify gaps and guide more impactful philanthropic strategies.

Table 13. Success factors for Family Giving



CONCLUSIONS AND RECOMMENDATIONS



CHAPTER FIVE:

CONCLUSIONS AND RECOMMENDATIONS

5.1 Global trends in the Philanthropic environment

From a European perspective, the joint briefing by Indiana University Lilly Family School of Philanthropy and Philea, titled “The Philanthropy Environment in Europe 2022⁷⁸,” presents the challenges and strengths in areas such as operating ease, tax incentives, and cross-border flows, while also examining the socio-cultural and economic impacts of the COVID-19 pandemic. The conclusions drawn underscores a positive inclination from European governments toward stimulating philanthropy, coupled with instances of deliberate closures in some countries. Challenges include the slow adaptability of laws and persistent barriers at Member State and EU levels. The report emphasises the need for a more favourable operating environment, as outlined in the European Philanthropy Manifesto, to unlock the full potential of European philanthropy through better recognition, facilitation of cross-border philanthropy, sector protection, and encouragement of co-granting and co-investment opportunities for public good and civil society

5.1.1. Digital technologies in Family Philanthropy

Digital transformation is reshaping the landscape of family philanthropy, introducing innovative approaches to fundraising and engagement. Technology is harnessed to enhance the efficiency and transparency of philanthropic initiatives. Crowdfunding platforms such as GoFundMe, Kickstarter, and Donors Choose have gained prominence, enabling individuals and families to create impactful campaigns with global reach. These platforms empower donors to contribute directly to causes they care about, fostering a more direct and personal connection between givers and recipients.

At the same time, the influence of social media on philanthropy is undeniable. Platforms like Facebook, Instagram, and Twitter serve as powerful tools for amplifying awareness, sharing stories, and mobilising support. Features like Facebook Fundraising and Instagram’s donation stickers simplify the process of contributing to causes. Social media campaigns, including hashtag movements like #GivingTuesday, have become instrumental in rallying communities around philanthropic endeavours, transcending geographical boundaries.

Family philanthropies are increasingly adopting data-driven decision-making processes. By leveraging data analytics, organisations can measure the impact of their initiatives, identify areas for improvement, and make informed choices about resource allocation. Prominent examples include the Gates Foundation, which utilises data to address global health challenges and optimise the effectiveness of its interventions.

5.2. Piecing it together

Africa’s growing number of high-net-worth individuals (HNWIs) has drawn significant attention, particularly due to their increasing involvement in philanthropy⁷⁹. However, despite the noble intentions, philanthropy in Africa has encountered challenges. One key issue is the limited participation of intended beneficiaries in shaping and providing feedback on philanthropic interventions, with existing efforts often being tokenistic (Tendai, 2018)⁸⁰.

⁷⁸<https://globalindices.iupui.edu/doc/PHILEA-IU-2022%20European%20Philanthropy%20Environment%20Brief.pdf>

⁷⁹<https://africanphilanthropyconference.com/wp-content/uploads/2024/04/2019-African-Philanthropy-Conference-Report.pdf>

⁸⁰Murisa, Tendai. (2018). African Philanthropy: Evolution, Practice and Change.

Table 1. Key trends in African Philanthropy**1. Growth of Impact Investing:**

The use of financial investments to generate both financial returns and social or environmental impact is on the rise, aligning investors' values with positive contributions to the continent

2. Focus on Data and Evidence-Based Decision-Making

Maturity in the philanthropic sector is driving an emphasis on data and evidence to inform decision-making, ensuring impactful and effective allocation of resources.

3. Increasing Focus on Sustainability

With climate change impacts intensifying, sustainability is a growing concern in African philanthropy, encompassing environmental and organisational sustainability.

4. Rise of Collaborative Philanthropy

Partnerships and collaborations are increasingly utilised to address complex challenges, leveraging the strengths and resources of multiple actors for greater impact.

5. Growth of Community-Led

Development: Utilising local knowledge and leadership to drive development is a growing trend, recognizing the significance of local ownership and empowerment for lasting change.

6. Focus on Youth Empowerment:

With a burgeoning youth population, empowering and engaging young people is a pivotal trend, aiming to harness their energy for positive change.

7. Increasing Focus on Gender Equality:

Recognizing the crucial role of women's rights, philanthropy organisations are actively promoting gender equality and empowering women and girls.

8. Rise of Innovation:

Embracing new and creative approaches to address challenges, innovation is a key trend, with a focus on leveraging technology and other innovations for impact.

9. Growth of Social Entrepreneurship:

Businesses addressing social and environmental challenges are on the rise, supported by impact investing and specialized funding streams.

10. Digital Platforms for Fundraising and Donor Engagement

The proliferation of digital platforms, including social media and crowdfunding websites, is changing the fundraising landscape, offering wider reach, streamlined processes, and real-time updates.

11. Focus on Building Capacity:

Recognizing the evolving sector, there is a growing emphasis on building the capacity of organisations and individuals through training, professional development, and support for new initiatives.

12. Interest in Corporate Social Responsibility (CSR)

More companies are engaging in social and environmental issues through CSR strategies, presenting opportunities and challenges for philanthropy organisations in terms of increased funding and collaboration requirements.

5.3. Nurturing Sustainable Philanthropy in Eastern Africa

Family giving in Eastern Africa is deeply rooted in a commitment to legacy, the pursuit of diversified funding, and a burgeoning awareness of pressing challenges like youth unemployment and limited domestic philanthropy. Evolving trends in the sector spotlight a shift towards promoting local giving, advocating for economic reforms, and a steadfast focus on effective governance for long-term sustainability.

This comprehensive study provides a nuanced understanding of family giving traditions, succession planning, legacy, and philanthropic identity in East Africa. The findings illuminate the intricate interconnectedness of these components, underscoring the imperative for family foundations to deftly navigate challenges while seizing emerging opportunities. The adaptive integration of philanthropic practices within the unique cultural, social, and economic contexts of East Africa emerges as a guiding principle.

5.4. Sustaining Impact- Strategies and Frameworks in Family Philanthropy

Embarking on a philanthropic journey as a family is a powerful means of passing down shared beliefs and values. This chapter delves into the critical steps and frameworks that families can adopt to ensure the sustainability of their impact in philanthropy. Drawing insights from interviews and expert perspectives, this exploration encompasses strategic planning, detailed frameworks for long-term goal setting, impact measurement, and success metrics.

5.5. Setting the Foundation-Family Governance Structures

Effective family philanthropy begins with a robust governance structure. Interviews with experts emphasise the importance of setting guiding principles, policies, and practices. Virginia Esposito's insights underscore that attention to governance simplifies subsequent philanthropic work, making it more rewarding. Successful governance structures commonly encompass principles, policies, and practices.

5.6. Establishing Core Principles- A Unifying Vision/ Echoing Founders Dreams

Creating a vision or a set of beliefs is the cornerstone of effective governance. Families are encouraged to develop a mission statement, vision statement, or a list of shared values that articulate their unique philanthropic vision. This process involves engaging in open, sometimes intense, debates to articulate values that serve as the unifying foundation for the family's philanthropic journey.

5.7. Crafting Guiding Policies- Transparency and Decision-Making

Once guiding principles are in place, the focus shifts to policies that maintain and implement these principles. Families are advised to establish policies for communication, grant recommendations, and rules governing family philanthropy. Clear conflict-of-interest policies and investment guidelines provide a structured approach to decision-making, minimising conflicts and providing clarity for all family members involved.

5.8. Implementation in Practice- Effective Collaboration and Education.

The practical implementation of family philanthropy involves regular communication and collaboration. Families are encouraged to meet frequently, leveraging tools like secure websites or listservs for seamless information sharing. Education programs become crucial, especially when involving multiple generations. This ensures that new stewards comprehend their roles and responsibilities, fostering a sense of shared responsibility.

5.9. Impact Measurement and Success Metrics in Family Giving.

Philanthropy is not just about giving; it is about making a positive and lasting impact on the causes families care deeply about. As families engage in giving, it becomes crucial to adopt robust impact measurement strategies and define success metrics. This ensures that their philanthropic efforts cause tangible and meaningful outcomes. Here, we delve into the key aspects of impact measurement and success metrics in the context of family giving.

5.9.1. Defining Impact

Defining impact involves looking beyond financial contributions to understand the broader and deeper changes that result from philanthropic initiatives. Families need to identify the specific outcomes they aim to achieve, whether they relate to social, economic, or environmental dimensions. For instance, impact could involve improvements in educational outcomes, enhanced community well-being, or sustainable environmental practices.

5.9.2. Establishing Clear Objectives and measures of success.

Before embarking on any philanthropic endeavour, families should establish clear objectives and goals. These objectives serve as the foundation for impact measurement. Whether it is reducing poverty, promoting education, or advancing healthcare, articulating precise goals provides a framework for assessing progress and success.

Measurable indicators are essential for tracking progress toward goals. Families should identify key performance indicators (KPIs) that align with their philanthropic objectives. These indicators could encompass quantitative metrics, such as the number of individuals positively impacted, educational milestones achieved, or specific community-level changes.

5.9.3. Learning and Continuous Improvement

The journey of impact measurement is also a journey of learning. Families should embrace a culture of continuous improvement, learning from both successes and challenges. This involves reflecting on the strategies implemented, understanding what worked well, and identifying areas for refinement.

Stakeholder engagement is vital in understanding the many side impacts of philanthropic initiatives. Families should actively involve beneficiaries, community members, and other relevant stakeholders in the evaluation process. Their perspectives provide valuable insights and contribute to a more inclusive and holistic impact assessment.

5.10. Fostering Social Responsibility and Ethical Giving in Family Philanthropy

As family philanthropy in Eastern Africa grapples with numerous ethical challenges, it is important to address the ethical considerations that underpin the very essence of philanthropic endeavours. This section explores the foundational principles of social responsibility and ethical giving, aiming to guide family foundations towards a more conscientious and impactful approach.

5.10.1. Social Responsibility in Family Philanthropy

Social responsibility demands transparency in decision-making processes and the allocation of resources. Foundations should communicate openly with stakeholders, providing clear insights into their objectives, strategies, and the outcomes of their philanthropic efforts.

Ethical giving necessitates a comprehensive evaluation of the impact of philanthropic initiatives. Family foundations should go beyond measuring success solely in financial terms, considering the broader social, cultural, and environmental implications of their interventions.

Embracing social responsibility involves adopting community-centric approaches. Foundations should actively engage with local communities, understanding their unique needs and preferences to ensure that interventions align with the cultural context and empower rather than impose.

5.11.2. Ethical Giving in Family Philanthropy



Diversification of Funding Sources.

Ethical giving requires family foundations to move beyond a heavy reliance on founders. Diversifying funding sources ensures financial independence, reduces conflicts of interest, and enhances the foundation's ability to address emerging societal challenges.



Local Philanthropy Advocacy.

Ethical giving involves advocating for increased participation from local businesses and individuals. Foundations should actively promote the idea of domestic philanthropy, highlighting the social responsibility of businesses and individuals in contributing to the welfare of their communities.



Youth Empowerment and Employment.

Ethical giving emphasises addressing youth unemployment by creating opportunities for skill development and meaningful employment. Foundations should collaborate with local educational institutions and businesses to foster initiatives that align with the aspirations of the youth.



Governance and Succession Planning.

Ethical giving requires family foundations to establish robust governance structures and succession plans. Implementing term limits for board members and ensuring transparent processes contribute to ethical practices, fostering trust among stakeholders.



Equitable Access to Financial Assistance.

Ethical giving demands fair and transparent processes for securing financial assistance. Family foundations should actively work towards removing systemic barriers that hinder entities, such as the Ambachew Foundation and Samrawit Foundation Ethiopia, from accessing vital funding.



Resource Allocation and Capacity Building.

Ethical considerations extend to resource constraints and capacity challenges. Family foundations should promote fair resource allocation, avoid biases, and actively invest in internal capacity building to enhance effectiveness and sustainability.



Collaboration as a Guiding Principle.

Ethical giving recognizes collaboration as a guiding principle. Foundations, such as the Meseret Foundation, should actively seek partnerships, both within the philanthropic sector and beyond, to maximise their impact and share resources for the greater good.



Cultural Sensitivity and Community Engagement.

Ethical giving entails a commitment to overcoming community resistance and misconceptions. Foundations should approach cultural interventions with sensitivity, engaging communities in a dialogue to evolve understanding and address misconceptions through open communication.



Long-Term Impact and Sustainability.

Ethical giving focuses on ensuring the long-term impact and sustainability of philanthropic interventions. Foundations should actively communicate the lasting benefits of their initiatives, dispelling the notion of assistance as a short-term “handout” and promoting the understanding of sustained community development.



Specialised Approaches in Specific Areas.

Ethical giving requires family foundations to address challenges in specific areas, aligning their philanthropic efforts with the unique needs of the communities they serve. Foundations, such as Mo Dewji Foundation and Elevate Child Trust, should adopt specialised approaches in areas like job creation, gender equality, and conservation.



Commitment to Good Governance.

Ethical giving necessitates a commitment to good governance within family foundations. Establishing written policies, addressing conflicts of interest, and ensuring transparency become essential components of ethical practices, enhancing the credibility and impact of philanthropic endeavours.

5.12. Future Outlook in Family Philanthropy in East Africa

As family philanthropy in Eastern Africa ventures into the future, it faces a landscape shaped by dynamic socio-economic and technological changes. The evolving trends observed in this comprehensive study, coupled with broader global shifts, offer a glimpse into potential scenarios and projections that can guide family foundations in fostering sustainable and impactful giving.

1. Continued Embrace of Technology for Transparency and Efficiency

The role of technology in family philanthropy is poised to become even more central. The region's active exploration of blockchain and other technologies for enhanced transparency and accountability reflects a broader global trend. As digital tools continue to advance, family foundations are likely to increasingly leverage them not only for fundraising but also for program implementation and impact assessment. The integration of technology is expected to streamline processes, enhance data-driven decision-making, and foster a culture of openness and efficiency within philanthropic endeavours.

2. Socio-Economic Shifts and the Redefinition of Philanthropic Priorities

Socio-economic changes, including shifts in job markets, economic structures, and global challenges, will influence the priorities of family foundations. The study's recognition of youth unemployment as a significant challenge aligns with a global focus on empowering younger generations. In the future, family foundations may increasingly direct their resources towards initiatives that address not only immediate community needs but also broader societal challenges, such as climate change, health crises, and economic inequalities. The dynamism of family philanthropy will be crucial in adapting to emerging needs.

3. Increased Collaboration and Partnerships

Collaboration has been identified as a key theme in the study findings, and this is likely to intensify in the future. Family foundations in Eastern Africa, mirroring global best practices, may seek stronger alliances with philanthropic networks, local communities, and even governmental bodies. Collaborative efforts can amplify impact, pool resources, and address challenges that transcend individual foundation capacities. Embracing a spirit of cooperation will be essential for navigating the complexity of future socio-economic and environmental issues.

4. Adaptation to Changing Philanthropic Trends Globally

The study highlights a shift towards more agile family foundations in Eastern Africa. This aligns with global trends where philanthropy is becoming increasingly adaptive to changing circumstances. Family foundations are likely to proactively adjust their strategies to address emerging challenges and opportunities. The ability to pivot swiftly in response to evolving socio-economic and technological landscapes will be a hallmark of successful family philanthropy in the future.

5. Environmental Sustainability as a Core Philanthropic Tenet

The strong commitment to environmental sustainability observed in the study reflects a broader global consciousness regarding climate change and ecological responsibility. Family foundations are anticipated to play an active role in supporting initiatives related to conservation, climate change mitigation, and sustainable development. This alignment with global priorities positions family philanthropy as a driving force in addressing environmental challenges and contributing to a more sustainable future.

6. Focus on Multi-Generational Engagement

The study underscores the importance of multi-generational engagement within family foundations. In the future, this commitment to involving younger generations in philanthropy is likely to intensify. Family foundations may develop structured programs for mentorship, leadership development, and educational initiatives to ensure a seamless transition of values and responsibilities across generations. This approach aligns with global best practices recognizing the pivotal role of youth in shaping the future of philanthropy.

7. Advocacy for Systemic Change

While not explicitly mentioned in the study findings, family foundations in Eastern Africa are poised to contribute to advocacy for systemic changes in economic models and societal structures. Globally, there is a growing recognition that philanthropy can be a catalyst for inclusive and sustainable development. Family foundations may increasingly use their influence to advocate for policies that foster economic inclusivity, social justice, and equitable distribution of resources.

8. Innovative Financing Models for Long-Term Impact

As family foundations navigate challenges related to funding sources, the future may witness the exploration of innovative financing models. Foundations might adopt strategies such as impact investing, social impact bonds, or collaborative funding approaches. This dynamic approach to financing could enhance financial sustainability and expand the scope of philanthropic impact, aligning with a broader global movement towards innovative funding mechanisms.

9. Shaping the Future of Family Philanthropy

The outlook for family philanthropy in Eastern Africa is marked by a confluence of global best practices and region-specific dynamics. Adapting to technological advancements, responding to socio-economic shifts, and embracing collaborative, multi-generational, and environmentally conscious practices will be pivotal. Family foundations are poised not only to address immediate challenges but to proactively shape a future where their philanthropic endeavours contribute significantly to positive and lasting change on both local and global scales. As East Africa positions itself on the forefront of dynamic philanthropic trends, the region's family foundations can lead by example, setting benchmarks for impactful, sustainable, and adaptive giving.

5.13. Key Recommendations.

Collaboration for Impact.

Encourage collaboration among family foundations, philanthropic networks, and local communities to maximise impact and collectively address familiar challenges. This can be realised through **Strategic Partnerships**. Foundations see significant opportunities in forming strategic partnerships to amplify impact and share resources.

Diversification of Funding Sources.

Explore diverse funding avenues, including strategic partnerships, external funding, and collaborations with philanthropic networks to bolster financial resilience.

Leveraging Technology for Engagement.

Harness technology for community engagement, efficient program implementation, and innovative solutions to address challenges effectively.

Community Empowerment and Cultural Engagement.

Emphasise the importance of cultural engagement and preservation in family giving traditions, addressing challenges related to cultural interventions. Recognizing opportunities in changing attitudes and fostering local support stands as a cornerstone for positive community impact.

Robust Documentation and Evaluation.

Implement robust documentation and evaluation processes to measure impact, draw lessons from experiences, and continuously improve philanthropic initiatives.

Awareness and Education Drive.

Emphasise the importance of awareness and education to overcome challenges, shift attitudes, and foster a collective understanding of philanthropy's transformative potential.

Succession Planning and Values Preservation.

Prioritise succession planning, leadership development, and values preservation to ensure the continuity and sustainability of family giving traditions

Advocacy for Philanthropy.

Advocate for the recognition and support of philanthropy, emphasising its positive impact on community well-being and broader societal development.

Community-Centric Philanthropy.

Actively involve communities in philanthropic initiatives, ensuring their participation and ownership for sustainable, positive outcomes.

Youth Empowerment in Philanthropy.

Actively engage and empower the youth in philanthropy, recognizing their potential as future leaders and contributors to positive societal change.

APPENDICES

a) Overview of Foundations Interviewed.

1. Dr. Ambachew Mekonnen Foundation - Ethiopia.



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Dr. AMBACHEW MEKONNEN
FOUNDATION

- ◆ The foundation is in its initial stages, and shows potential for significant impact by addressing cultural, educational, and environmental challenges through a comprehensive approach. Challenges in funding and institutional recognition are acknowledged.
- ◆ Strategic partnerships and diverse fundraising avenues are identified as opportunities for the foundation. The commitment to intergenerational impact and a seamless leadership transition reflects a sustainable approach to family giving.

2. Samrawit Foundation - Ethiopia.



- ◆ Samrawit Foundation is making a substantial impact, particularly in bringing vulnerable children back to school. Challenges include the difficulty in securing financial assistance.
- ◆ Changing attitudes and fostering local support are seen as opportunities. The foundation's sustainability is driven by the founder's commitment and plans to seek external funding.

3. Ayzon Foundation - Ethiopia.



- ◆ Ayzon Foundation, led by Engineer Shalom Yob, operates with a focus on quality education, water sanitation and hygiene (WASH), women and youth empowerment, and affordable housing. Challenges include bureaucratic obstacles and biases in donor preferences.
- ◆ Opportunities lie in community empowerment and entrepreneurship for self-sustainability. The trend is toward innovative, self-sustainable initiatives within family giving traditions.

4. Manu Chandaria - Kenya.



- ◆ Manu Chandaria emphasises the importance of focussing on culture, independence from colonial mindset, community impact, and generational perspectives of family giving. Sustainability is achieved through a focus on education and health.
- ◆ Challenges include the need to raise awareness, while opportunities lie in increased education and a collective understanding of the responsibility to give back.

5. Elevate a Child Trust - Kenya.



- ◆ The essence of family giving portrayed by Elevate a Child Trust revolves around cultural significance, community impact, and generational perspectives.
- ◆ Sustainability is a key concern, and challenges are addressed through integrated approaches within philanthropic networks.

6. Wangari Maathai Foundation - Kenya.



- ◆ The foundation highlights the enduring relevance of Wangari Maathai's legacy and its commitment to holistic, sustainable, and intergenerational impact.
- ◆ Diverse programs, partnerships, and future reflect dedication to addressing complex societal challenges through environmental conservation actions and social justice.

7. Ratansi Family Foundation - Kenya.



- ◆ The Ratansi family's deep-rooted philanthropic journey in Kenya and emphasizes cultural ties, community impact, and generational continuity.
- ◆ The family's commitment to education as a tool for empowerment and nation-building stands out as a cornerstone of their giving tradition.

8. Palm House Foundation - Kenya.



- ◆ The Palm House Foundation demonstrates a focused approach to family giving, primarily centred on education, with evident impact on students' lives.
- ◆ Sustainability efforts include financial prudence, governance structures, and a succession plan. Challenges and opportunities emphasise continuous improvement and collaboration.

9. Karimjee Foundation - Tanzania.



KARIMJEE
Foundation

- ◆ The Karimjee Foundation has a rich history of philanthropy, deeply rooted in family values and a commitment to transforming lives.
- ◆ Diverse initiatives spanning education, entrepreneurship, and conservation contribute to the sustainable development of East Africa.

10. Mo Dewji Foundation - Tanzania.



- ◆ The MoDewji Foundation is making a significant impact in East Africa through initiatives in health, water, and education.
- ◆ Challenges are addressed through community involvement, awareness, and technological solutions. Collaboration and continuous learning within the philanthropic sector are crucial for success.

11. Mwalimu Nyerere Foundation - Tanzania.



- ◆ The foundation faces challenges, emphasising the need for diversified funding sources, particularly domestic philanthropy, for sustainability.
- ◆ The legacy of Mwalimu Nyerere remains a driving force, and the foundation's success is measured by its impact on peace, unity, and people-centred development. Broader societal issues, such as youth unemployment, are highlighted.

12. Ruge Mutahaba Foundation - Tanzania.



- ◆ In its initial stages, the Ruge Mutahaba Foundation focuses on understanding and addressing challenges faced by young people in emerging economies.
- ◆ Opportunities lie in addressing gaps, changing narratives, and contributing to emerging trends in family giving.

13. Jakaya Kikwete Foundation - Tanzania.



- ◆ The President Jakaya Kikwete Foundation, under former President Jakaya Kikwete, has made substantial impacts in maternal health and youth empowerment.
- ◆ The foundation is strategically transitioning to ensure sustainability, with an emphasis on documentation, collaboration, and a holistic understanding of philanthropy.

Agape Restoration Foundation - Uganda.

- ◆ Agape Restoration Foundation has a strong focus on family giving traditions, addressing marriage and family issues through counselling, outreach, and support programs.
- ◆ Sustainability is sought through mentorship, volunteer involvement, and building a larger team. The organisation aims to leave a legacy of restored families and positive transformation.

15. Concern for the Girl Child (CGC) - Uganda.



- ◆ CGC operates in various aspects emphasising education, holistic community impact, and collaboration for sustainability.
- ◆ Challenges include sustaining funding and perceptions of short term programs. Opportunities are identified in youth engagement and collaboration among organisations.

16. Nnabagereka Development Foundation - Uganda.



**NNABAGEREKA
FOUNDATION**

- ◆ The Nnabagereka Development Foundation has made a significant impact on education, health, and socioeconomic aspects.
- ◆ Sustainability is effectively addressed through diverse funding sources and strategic partnerships.

17. Mukisa Foundation - Uganda.



- ◆ Mukisa Foundation has made a significant impact on children with disabilities through an integrated approach. The Founders' legacy revolves around positive societal change and increased inclusivity for children with disabilities. Opportunities include continuous community engagement and partnership expansion.
- ◆ Challenges include high demand for services, initial resistance to cultural interventions, limited funding for project needs, and slow pace of shipment of assistive devices.

18. Mama Wellness Foundation - Uganda.

- ◆ Mama Wellness Foundation's focus on community health, collaboration with the government, and sustainability through community acceptance and involvement emerge as key themes.
- ◆ The organisation aims to leave a legacy of sustainable, replicable health programs, but it is facing challenges related to funding.



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