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South Africa's solidarity fund: navigating the shores of uncertainty and crisis

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It was December 2020, a year that had seen the world lock down in the face of the COVID-19 pandemic. The Solidarity Fund (the Fund) was in existence for nine months, and its chair, Gloria Serobe [1] was in her study at her Johannesburg home – that had now become her office – thinking about South Africa's COVID-19 vaccination programme. Amidst much uncertainty, including increasing numbers of COVID-19 infections, hard lockdowns and travel restrictions, two facts were clear: the country urgently needed vaccines and that having procured the vaccines, it would need to get those vaccines to as many South Africans as possible. The South African Government had made it clear that it was going to procure the vaccines and lead the vaccine rollout, which left Serobe deep in thought about what supporting role the Fund could play. What strengths could it draw on and what Agile methods could it use to help the government roll out its vaccine programme?

Background on the pandemic

The first cases of an unexplained pneumonia were reported in the Wuhan Province of China in November 2019. Scientists and epidemiologists rapidly sequenced the virus, and results showed that it was a zoonotic virus belonging to the *coronaviridae* family. It was named SARS-COV-2 and China shared the sequencing results with the rest of the world in January 2020 (WHO, 2021). The World Health Organisation (WHO) subsequently named the virus COVID-19, an acronym for coronavirus disease 2019 (Taylor, 2021).

The first official death from the disease was on 11 January 2020, that of a 61-year-old Chinese man, and on 13 January, the first confirmed case of COVID-19 outside of China was reported in Thailand. From then, the virus appeared rapidly in other countries (Taylor, 2021). However, no one foresaw that COVID-19 would reach pandemic proportions.

COVID-19 presented with several new pathological features, but at the outset, all that appeared certain was that its severity ranged from mild illness to severe disease and even death, and that elderly people and those with existing underlying health conditions were the most vulnerable (Taylor, 2021). The rapidly rising number of cases suggested that the virus was highly contagious.

In February 2020, the virus collapsed the healthcare system in Northern Italy, with patients dying in hospital corridors. Officials locked down several towns in the area to contain the disease. New York and New Jersey became early hotspots in the USA, where incoming flights from China were banned (Taylor, 2021). In mid-March, the European Union (EU) voted to close off 26 countries from the rest of the world for the first time in history, and on 11 March 2020, the director-general of WHO, Dr Tedros Ghebreyesus, declared COVID-19 a pandemic. He advised governments on how to respond, stating that: "All countries must

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strike a fine balance between protecting health, minimizing economic and social disruption, and respecting human rights" (WHO, 2020).

COVID-19 comes to South Africa

South Africa's minister of health at the time, Dr Zweli Mkhize, announced the first case of COVID-19 in South Africa on 5 March 2020, in a 38-year-old man who had returned from a holiday in Italy. The National Institute for Communicable Diseases (NICD) maintained that: "The case has been isolated and containment measures are ongoing including the monitoring of contacts. It is important to note that the identification of a single imported case in a traveller from an area with widespread community transmission does not mean that COVID-19 is currently spreading in South African communities" (NICD, 2020).

The government had already embarked on a multilingual campaign through social media and the press to educate the public on the spread of the virus and on ways to prevent it. These messages emphasised the importance of frequent handwashing with soap and water or with a hand-sanitiser that contained at least 60% alcohol. It also advised that people should keep a distance of at least 1.5 m from one another, and that they should cover their mouths when coughing or sneezing (Wiysonge, 2020).

As new phrases entered people's vocabulary, such as "social distancing" and "flattening the curve" (Ramaphosa, 2020a), and despite the NICD's assurances, there were 17 confirmed cases of the virus one week after the first case was announced. While 16 of those cases were people who had returned to South Africa from high-risk countries, the 17th was more concerning, as it was the first case where the patient had not travelled outside the country's borders. Community transmission had begun (Wiysonge, 2020).

On 15 March 2020, the government declared a national state of disaster and created a National COVID-19 Command Council (NCC) headed by President Cyril Ramaphosa. It closed schools and other educational institutions and prohibited gatherings of more than 100 people. It banned travel from high-risk countries and established a Ministerial Advisory Committee (MAC), comprising 45 scientists whose expertise ranged from laboratory testing to public health and research. The MAC's role was to translate scientific evidence into a format that could be understood and used by the NCC (Wiysonge, 2020).

The government, assisted by the MAC, put in place systems for case investigation and contact tracing. It isolated and treated confirmed cases, and anyone who had been in contact with an infected person, had to self-quarantine for 14 days. It also strengthened screening measures at international airports and shut down more than half of the country's land borders and two seaports (Wiysonge, 2020).

The lockdown

Despite these measures, the number of positive cases was increasing by about 42% each day, and on Monday, 23 March 2020, President Ramaphosa announced a 21-day national lockdown, starting at midnight on Thursday, 26 March 2020. People could leave home for only essential services such as food, medicine, fuel, medical help or to collect social grants. The government banned the sale of all non-essential goods including clothing, tobacco and alcohol, arguing that the latter filled up hospital emergency facilities. Only people who worked for essential services could go to work, and no one was permitted to leave their homes to exercise (Wiysonge, 2020). At the same time, the president announced that the National Department of Health (NDoH) would ramp up a public health management programme to "significantly increase screening, testing, contact tracing and medical management" (Ramaphosa, 2020a).

The lockdown served its purpose, and the rate of increase in the virus reduced to about 4% in the first two weeks. The NCC then extended the lockdown for a further two weeks until the

end of April 2020. Ramaphosa said in his second address to the nation that South Africans could not be complacent: "If we end the lockdown too soon [. . .] we risk a massive and uncontrollable resurgence of the disease" (Ramaphosa, 2020b). He announced further that the NCC was working on a risk-adjusted strategy to allow a phased return to operation of certain sectors of the economy (Ramaphosa, 2020b).

The Socio-Economic backdrop in South Africa

According to the World Bank, South Africa was the most unequal country in the world (World Bank Press Release, 2022). The International Monetary Fund (IMF) noted that South Africa's Gini coefficient had remained stubbornly high, while other emerging markets had succeeded in reducing inequality. It attributed this to various factors: the income distribution was highly skewed, with 20% of the population accounting for over 68% of income; significant income disparities across regions, with people living in rural areas being much poorer than those living in cities; stagnating growth that had not created enough jobs; and higher unemployment rates than other emerging market economies, especially among the youth (IMF, 2020).

This inequality was reflected in the healthcare system, which was two-tiered and unequal. The state-funded public sector served around 70%–80% of the population, while the private sector, which was funded through individual contributions to medical aid schemes, served the remainder. The demands placed on the South African public health sector exceeded its capacity which meant that those who could pay received better treatment than the rest (Rensburg, 2021).

The NDoH monitored public health nationally, while provincial departments operated the regional hospitals and local municipalities managed primary care clinics. Although the government subsidised the public health system, public hospitals were underfunded and understaffed, and the situation was exacerbated by mismanagement and corruption in the public health system (International Insurance.com, n.d.).

In Ramaphosa's address to the nation, he pointed out that the rapid spread of the disease would be "extremely dangerous for a population like ours, with large numbers of people with suppressed immunity because of HIV and TB, and high levels of poverty and malnutrition" (Ramaphosa, 2020a). Locking down a society where many people lived in shacks and eked out a living daily, would not be easy. Ramaphosa accordingly deployed the country's national defence force to support the police in enforcing the lockdown.

The solidarity fund

The first economic intervention that Ramaphosa cited in his lockdown speech on 23 March 2020, was the establishment of a Solidarity Fund (the Fund) to which all sectors of society could contribute. He announced that the Fund would be chaired by Gloria Serobe with Adrian Enthoven [2] as her deputy. They were highly regarded members of the business community, with extensive personal philanthropic experience. Ramaphosa maintained that the Fund "will have a board of eminent South Africans to ensure proper governance." He gave details of the Fund's website so that members of the public could start donating and committed the government to providing seed capital to the Fund of R150m. "The Fund will complement what we are doing in the public sector. . ..It will fully account for every cent contributed and will publish the details on the website," he said (Ramaphosa, 2020a).

Martin Kingston, who was chair of financial advisory group Rothschild & Co. and vice president of Business Unity South Africa (BUSA) [3] at the time, explained how the concept of the Solidarity Fund came about. "Shortly after the first case of COVID-19 in South Africa, organised business decided at a BUSA meeting that it needed to respond proactively to the pandemic in a variety of ways: one of these was to ensure that we should be supportive of

any decisions that government might take but that we did so on as dynamic a basis as possible" (Kingston, 2022).

Not long after BUSA had reached this decision, Kingston attended a meeting of the executive committee of the National Economic Development and Labour Council (Nedlac) [4]. "At this meeting we suggested that there should be a solidarity fund. We felt there was the need for a platform that would enable all members of South African society to respond to the crisis. That evening, Minister Patel [Minister of Trade and Industry] who had been at the same meeting as I, rang me to say that government had had the same idea and that we should work together," said Kingston (Kingston, 2022).

He pointed out that because the initial announcement had come from the president, there had been an unfortunate assumption that the Fund was a government initiative. Emphasising the importance of the Fund's autonomy, he explained that it was independent of government and business. It was created as a platform for all South Africans, from the public and private sectors, civil society, as well as the general public, to contribute to one consolidated effort (The Solidarity Fund/governance overview, 2020).

At the same time, organised business had decided to form a further platform that would enable all businesses (not only those that were members of BUSA) to respond to the pandemic. They set this up in parallel with the Fund and called it Business for South Africa (B4SA). Kingston took on the role of chair and proceeded to play a pivotal role in both B4SA and the Fund, both of which worked closely to support the government's response to the pandemic.

Uncertainties at the time

In early March 2020, many uncertainties existed regarding the COVID-19 pandemic. Governments and medical communities were looking at what was happening in other countries and trying to learn from their experiences. "When the president called me and asked me to head up the Fund, there was drama in front of us and we were in trouble as a country, so I didn't think much about saying yes or no, I just said yes," recalled Serobe. "I was honoured that government and business and civil society had sufficient trust in me to do the right thing and to direct the funds to where they should be directed, with no leakage. On the other hand, I was scared, as I wondered if the wisdom would be there to do the right thing" (Serobe, 2022).

Serobe related that one of the most daunting tasks at the outset was talking to South Africans about what they had to do to stop transmission. "It was talking as we were experimenting. You are facing the country and trying to guide them while you are also trying to understand what this thing is about. You are talking to a population with all types of social arrangements. You are telling people to wash their hands where they don't have water, or to sanitise when we don't have sanitisers and to wear masks that we don't have available in the country," she said (Serobe, 2022).

Enthoven spoke too of the fear and uncertainty that prevailed at the time: "There was this sense that a tsunami is coming at us but we're not sure when. We were woefully unprepared for what was about to arrive and there was an enormous sense of urgency" (Enthoven, 2022). A further uncertainty was that no one knew how long the pandemic would last and what course it would take.

It was against this backdrop that Kingston and Patel set about designing, developing and implementing the Fund. They had no precedent to rely upon and it was simply a concept. According to Kingston, "it was a blank sheet of paper" (Kingston, 2022).

Setting up the Fund

"The first thing I had made clear to Minister Patel during our telephone conversation was that we would need thought leadership around how to set up the Fund," explained

Kingston. "We agreed that I should approach Ajen Sita, the head of professional services firm EY, to assist with this process. Ajen [Sita] brought in Grant Brewer [a partner specialising in strategy and innovation] to lead the EY team, which played a key role in operationalising the Fund. It was literally Minister Patel, Ajen [Sita], Grant [Brewer] and me who started brainstorming the shape, form, governance and composition of the Fund in those first few days" (Kingston, 2022).

The second thing that Kingston recognised was that they would need legal support, so he telephoned Professor Michael Katz, the chair of law firm ENSafrica, to enlist his firm's support. "I spent a lot of time in the early days contacting the leadership of companies and service providers to bring on board the requisite support. I telephoned Stephen van Coller, the CEO of EOH for information and communication technology support, Sim Tshabalala, the CE of Standard Bank [South Africa], for banking and financial support, and Trevor Manuel, chair of Old Mutual [Limited], for administrative support. Everyone, without exception or hesitation, said yes and threw resources at the project" (Kingston, 2022). "I have worked with all these business leaders in my 'day job' as an investment banker and as BUSA deputy chair. I thought that setting up the Fund was the appropriate and responsible thing to do, so I lent on them for support," he added (Kingston, 2022). Global auditing firm PricewaterhouseCoopers agreed to be the auditors of the Fund.

Brewer described how EY responded to Kingston's request: "We brought a team of experienced consultants into our wavespace™ innovation lab to brainstorm on whiteboards and started mapping out what could be done and what this organisation might look like. We pitched back our ideas two days later, with concepts so roughly outlined that they were a combination of handwritten notes, an assembly of whiteboards and iPad screens. In the space of five days, the concept was created, it was agreed with Minister Patel and senior members of government, a bank account was opened by Standard Bank, the registration documents were submitted to all the necessary authorities by ENSafrica and the Fund was in existence. What the whole Fund demonstrated from day one was this incredible willingness of everyone who was involved to set aside differences, challenges, complexities and just get involved with a focus on problem solving" (Brewer, 2022).

Brewer explained that the early establishment team began by outlining the requirements that would be needed to enable the Fund. "We also drew up an initial timeline so we could identify the various capabilities and functions that needed to be in place, and then accelerate getting the Fund operational" (Brewer, 2022). (See Exhibit 1 for EY draft timeline.)

Kingston recalled that three exercises happened quickly. "One was making sure we had the right service providers on board as a matter of urgency and the second was getting the internal team up and running. We recognised early on that we would need dedicated fundraising capability, and I brought in Paul Bondi (the co-head of Rothschild & Co. South Africa), who gave a year of his time to leading this process" (Kingston, 2022). They identified Nomkitha Nqweni, who had recently left her position as chief executive of Wealth, Investment Management & Insurance at Barclays Africa and Absa Group Ltd., as someone who had the time and expertise to take on the position of interim CEO (which she did from 2 April 2020). They also brought in Nic Kohler, the former CEO of the Hollard Group [5], to take on the role of COO, and Nicola Galombik to build the impact strategy of the Fund. Galombik, who was an executive director of Yellowwoods at the time, had extensive experience in setting up philanthropic organisations, having founded the youth employment accelerator, Harambee (WEF, n.d.). They also brought in Itumeleng Mahabane from consulting firm Brunswick, to advise on communication strategies. "Our third priority was to identify suitable board members, propose them to government and get its approval, and then approach the individuals themselves," explained Kingston. "This is what I would call the nascent, evolving executive team which settled upon the structure, with EY being the platform who we relied upon to do all the hard work and much of the thought leadership. We

were clear that the executive needed to shape the concept and that the board needed to support, sign off and endorse the concepts," he added (Kingston, 2022).

Choosing a board

Serobe chaired the first executive meeting including Enthoven, Kingston and the broader operational team on the Tuesday morning after the president's announcement. A priority was to determine who should be represented on the board. "The idea was that the Fund would be independent, but that it would represent all sectors of society including business, government, labour and civil society," explained Enthoven. "While the independence of the Fund was critical, it also had to work with government in the COVID-19 response. There would be one national programme for COVID-19 run by the NDoH and our job was to complement and support the national effort" (Enthoven, 2022).

Enthoven continued: "We had to figure out a process for appointing board members and decided that it was necessary that key stakeholders should be consulted including the president. We spoke to Minister Patel about who from government and labour should be on the board" (Enthoven, 2022). Sizwe Nxasana sprang to mind, as he had recently stepped down as CEO of FirstRand and understood the financial world and big money and had a lot of contacts in business. Ayanda Ntsaluba from the Discovery Group was another obvious candidate as he was a former director-general of health, and as such brought with him knowledge and experience around public health. Ministers Patel and Tito Mboweni (who was minister of finance at the time) were there from government, albeit in their personal capacities. Brewer added that, "It was trying to formulate a group of people who would hold a high standard of governance but who could also represent different South Africans and bring with them their relationships with funders and donors" (Brewer, 2022). (See Exhibit 2 for details of all the board members.)

Creating the structure

Kingston observed that at the outset of the Fund, everyone committed to do the work *pro bono*, and initially, the team did not need to budget for operating costs, as there were none. The whole philosophy of the Fund was that every cent of the money donated would go to the beneficiaries. They did, however, set themselves a fundraising target of R3bn which they had exceeded by September 2020 (Kingston, 2022).

Brewer described how the team brainstormed the fundraising processes with Bondi in the early days: "We needed to get organised around raising donation pledges and translating pledges to cash as soon as possible". Pointing out that the team did not initially know the magnitude of the donations that the Fund would receive, it set to work reaching out to individuals and corporates, while creating the infrastructure to receive both large corporate and institutional donations, as well as smaller donations from individual South Africans (Brewer, 2022).

Kingston pointed out that when COVID-19 first broke, no one knew how long it would last but people thought it would be for a period of about six to nine months. Whatever the Fund's time frame was, the team knew that it needed watertight systems and processes in place that would enable it to report satisfactorily to donors as well as to the public. "That meant that we needed to ensure that everything the Fund did was transparent and that there was accountability to the public," noted Kingston. As part of this process, the board established three subcommittees: audit and risk chaired by Tryphosa Ramano, fundraising chaired by Nxasana and disbursements chaired by Ntsaluba. "We involved the three leaders of the subcommittees early on in terms of designing processes that would be Agile and yet effective and accountable, so there was a top-down as well as a bottom-up approach" (Kingston, 2022).

He noted how they had been able to mobilise so much expertise and senior businesspeople because of the unusual circumstances of the time. "Individuals had the time to devote to the Fund because their normal work had been interrupted by the lockdown. People who had never worked together before found themselves working side by side in a virtual environment. We had people who were skilled entrepreneurially but also philanthropically minded, working at both board and executive level. And in my experience, when you bring together a lot of bright people with 20 to 30 years' experience, you get a lot of popcorn popping very quickly. If you then have the disciplines you can put around them with the likes of EY, ENSafrica and PWC to hold the ring, then very quickly you can panelbeat and fashion that into a sensible and appropriate process." Kingston observed that they were subjected to immense pressure in the early days because of the urgency of the situation and this enabled them to move quickly (Kingston, 2022).

Brewer explained that EY committed a team of about 35 people to support the operations of the Fund. "Given the commitment to speed, transparency, and the high level of governance that was needed, it was critical that the operational processes were designed and delivered to a high standard" (Brewer, 2022). Serobe observed that: "South Africans threw everything at the Fund and we cannot thank them enough. With this incredible response, we didn't want people to feel betrayed by not using the money quickly enough or by using it inappropriately. At one point we had as many as 100 people working *pro bono*" (Serobe, 2022). Enthoven observed that one of the things that made the Fund unique was "the degree of volunteering and commitment from the most senior people in the country". He cited two reasons for this: "one was that the threat felt existential for everyone – the economy came to a standstill, and the second was that people had a lot of time because their normal work had been disrupted by the pandemic" (Enthoven, 2022).

Determining the mandate

Brewer said that the strategic focus of the Fund's activities was outlined in the early concept documents and in the first draft of the impact strategy. This strategic impact framework conceptualised disbursing funds in four categories: preventing the spread of the virus; detecting the level of infection; supporting the provision of care to those that were ill; and supporting those whose lives were disrupted by COVID-19 (Brewer, 2022). These conceptual focus areas consolidated into three "pillars" where the Fund could have the greatest impact, namely, the health response, the humanitarian effort and the solidarity campaign. (See Exhibit 3 for the Fund's mandate and goals).

Brewer emphasised that the Fund "saw its role as a rapid response entity of scale working as a catalyst in spaces where no one else was acting" (Brewer, 2022). It was also designed to "unite the nation in solidarity behind the efforts of government, business and civil society to help South Africa through the COVID-19 challenge" (The Solidarity Fund/governance overview, 2020).

The three pillars

Brewer pointed out that everyone involved with the Fund leaned on their network for partners and volunteers, as Kingston had done at the beginning. Over a short time, the founding group settled on a core team to drive the activities of the Fund. This team evolved over time as new volunteers joined the Fund and others returned to their "day jobs" (Brewer, 2022).

Dr Jonathan Broomberg, the CEO of Vitality Health International, came in to lead the health pillar, while John Hunt, global creative director of advertising agency TBWA, led the behavioural change pillar. Hunt also assisted with creating a brand and communications strategy within the first week of the Fund's existence. Thandeka Ncube, who was the executive vice president of stakeholder engagement and regulatory affairs at mining

company Lonmin led the humanitarian pillar initially, until Wendy Tlou, who had extensive experience in communications and marketing strategies took over from her on 1 June 2020.

In September 2020, Tlou took over the behavioural change pillar from Hunt. Galombik took on the lead of the disbursements pillar and brought in Tshikululu Social Investments as a partner. "Tshikululu had a deep understanding of what actions would reach people at grassroots level and helped build the Fund's impact strategy and framework in a short space of time" (Brewer, 2022).

Operating the fund

Serobe pointed out that the Fund had to be fast and Agile to complement the government's slower-moving processes, but that at the same time it had to make sure that it was not reckless. She explained how the Fund did this: "Exco, including me, Adi [Enthoven] and Martin [Kingston] met every morning from 7h30 to 9h00 to process day-to-day things. We called these meetings war rooms. Then the board subcommittees had to meet weekly which they did in the hour or two immediately before the board meetings. They had been delegated some power, so they could make certain decisions and those that needed board approval were recommended to the board at its meeting an hour or two later. Then we had a weekly board meeting every Thursday evening at 19.00, so that board approvals and resolutions didn't have to wait for long periods. We had to get the right sequence in place to ensure that the governance processes were closed and there could be no excuses for not doing things the right way because of the need for speed" (Serobe, 2022) (see **Exhibit 4** for governance structure.)

Weekly board meetings continued for around the first four to six months of the pandemic. They were held in the evening to accommodate Mboweni, who had significant time constraints, given his role in government. This, according to Serobe, demonstrated the calibre of person who was on the board. "It was hand-picked, and everyone was successful in his or her own right and wanted to make this thing work. We were all flexible and in crisis mode and knew that the Fund was too prominent for anyone to be casual about it. There was 200% commitment from everyone" (Serobe, 2022).

Enthoven described his thoughts as they assembled the board: "I was anxious that you have a number of strong personalities and I wondered how they were going to work together. Any dysfunctionality at the board level, given how much governance oversight would be needed, and how active the board needed to be, would be the death knell of the Fund" (Enthoven, 2022).

His fears were unfounded, however. "It was an incredibly functional board that exceeded my expectations. Everyone had complete alignment of purpose, clarity on what our job was, and there was no attempt to overstep any boundaries, particularly in the relationship between government and the Fund. Everyone was respectful of the independence of the Fund and what it was set up to do. Every board member took their responsibilities very seriously" (Enthoven, 2022).

Kingston observed: "When you are meeting daily and in a systemised sort of way, this forces people to focus on what the priorities are and what outputs are required. This also makes people extremely productive" (Kingston, 2022). Brewer pointed out how effective the board chair and deputy were in collaborating with and guiding the executive team, and that their daily presence in the war room created opportunities for people to challenge one another and helped drive rapid decision making (Brewer, 2022).

Fundraising

Kingston said that he had asked Bondi to lead the fundraising team because as an investment banker, Bondi had 20 years' experience in raising funds from the corporate

community. “Paul [Bondi] lives and breathes in an environment where he is speaking to large corporates and institutions all the time, and we believed that the mainstay of our funding would be the corporate community” (Kingston, 2022). Bondi developed a large-scale fundraising strategy, using influential and well-respected key account managers [who] were appointed based on their relationships with potential donors. These managers approached prospective donors and enabled bespoke donor engagement. This provided a sense of comfort amongst donors, often resulting in repeat donations (The Solidarity Fund/interim impact report, 2020). One of the first large donations came from Mary Oppenheimer and her daughters, who pledged R1bn to the Fund in its first week of operation, and from global internet and technology group Naspers Limited, which pledged R500m to the Fund. By mid-April, the Fund had over R1.2bn in its bank account (Kohler, 2022).

South Africans also heeded the president’s call for donations and responded generously, with over 300,000 members of the public making donations ranging from as little as R5 to over R1m. In his speech of 9 April 2020, when Ramaphosa extended the hard lockdown, he once again called on the public for funding and on corporates to encourage payroll donations. He set the example by announcing that he and his deputy, as well as all the ministers and deputy ministers in cabinet, had undertaken to donate one-third of their salaries to the Fund for the next three months (Ramaphosa, 2020b).

“Bondi, with the guidance of the Fund Raising Board Subcommittee, worked on approaching corporates and chasing pledges, and overseeing the work of EY and Old Mutual to set up processes for converting the pledges into cash, partnering with organisations like supermarkets to enable people to make donations at checkout tills, getting the banks to allow clients to convert their rewards into donations to the Fund, and at the same time ensuring that the correct governance procedures were in place,” explained Brewer (Brewer, 2022). (See **Exhibit 5** for a summary of large donors.) Another way in which the Fund ensured good governance was by scrutinising the source of donations. To streamline this process, the Fund developed a donor policy and adopted vetting process to identify and validate the donations received (The Solidarity Fund/interim impact report, 2020).

Tandi Nzimande, who was appointed as permanent CEO of the Fund in November 2020, noted that because of the speed at which the Fund had to operate, it decided to report back to donors through pooled systems such as quarterly media updates, a monthly newsletter, an annual report and other interim reports, all of which were published on the website. She said that there was enormous emphasis on transparency and that the public could see, on the website, not only who donated money to the Fund but also to whom that money had been disbursed (Nzimande & Sangweni, 2022).

By September 2020, the Fund had received R3.118bn in donations. It had decided early on that the bulk of those funds would go to the health pillar (around 70%–75%), with roughly 20%–25% going to the humanitarian pillar and 5%–10% to the communications and behavioural change pillar. Enthoven explained that there had been some debate around how to balance short-term, medium-term and long-term spending and whether the Fund should be saving money to spend later. The Board concluded that because the Fund was intended as a rapid response vehicle, the purpose of which was to augment government’s response and fill the gaps, the biggest needs would probably appear at the beginning of the crisis. Once this decision had been made, it became clear that the money should be spent upfront, to plug the holes that appeared while government organised itself to respond to the crisis in the appropriate way (Enthoven, 2022).

The health pillar

Based on what the Fund could see happening in other countries, its focus at the outset was on procuring personal protective equipment (PPE) and ventilators. Nozipho Sangweni who

was appointed COO of the Fund in January 2022, explained that there was an ecosystem of collaboration, with deep roots in business and government, that informed decision-making at the Fund. This played a critical role in influencing how the Fund spent its money in the health pillar (Nzimande & Sangweni, 2022).

Enthoven described how the Fund went about procuring PPE. The process, led by Broomberg, depended on having information from the government about what was needed where, and the Clinton Health Access Initiative, a large global NGO, had sophisticated systems that helped the NDoH with this process. This system could not only pinpoint where those needs were but could also determine where there was most urgency due to heavy patient loads. Broomberg then worked with a group of health specialists and experts as well as B4SA, which had established a procurement hub of private sector volunteers to procure medical supplies and PPE. Once the procurement team had located the PPE, the health specialists assessed the suitability of that PPE, from there it went to the war room which double-checked that the PPE was indeed needed. "We also had McKinsey (a global firm of management consultants) providing us with a daily moving average price, as these were moving so rapidly and supply was so constrained that we didn't really know what the market price was," said Enthoven. The war room ensured that the proposed price of the PPE had been checked against the McKinsey chart, as well as other organisations actively procuring PPE such as the Motsepe Foundation and would only sign off once it was happy that the price was fair (given the fact that all prices were inflated). "It was an incredibly difficult juggling act. We had to secure availability fast, as PPE was in short supply worldwide, but we didn't want to overpay. We would literally decide on the day whether a price was fair or not, and then approve the payment" (Enthoven, 2022).

Once the contracts had been prepared by ENSafrica, they were signed off through the Fund's internal governance processes and the procurement happened. Another partner of the Fund, Imperial Logistics, which was one of South Africa's largest logistics companies, then delivered the equipment to wherever the NDoH required it.

One of the most difficult aspects of procurement was deciding from whom to procure. According to Enthoven, this was particularly complex in the PPE area. The difficulty was that very little PPE was locally manufactured, and most of it was imported by agents. "While we used reputable agents identified by B4SA who had an established track record in importing medical supplies and equipment, we were criticised by some sectors for not giving more opportunities to local businesses, particularly black-owned businesses. So, while we wanted to support as diverse a range of people as possible, it wasn't always easy. We had to put in place a robust process of trying to hold our ground on wanting the best quality at the lowest price to get here as fast as possible," he said.

The Fund procured and distributed its first PPE on 4 April 2020 and also managed to secure the purchase of 200 ventilators from Israel: this on the back of early clinical evidence that invasive ventilation was the best way to provide patients with oxygen support. However, as time went on evidence showed that non-invasive oxygen support was more effective, and the Fund was able to support the design and manufacture of locally made non-invasive ventilators for use in hospitals. This process demonstrated the Fund's purpose: a rapid response vehicle, catalytic, additive and focused on a critical requirement related to the COVID-19 response.

Dr Gugu Ngubane, who joined the Fund to lead the health pillar from January 2021, pointed out that the Fund only committed to support projects based on the approved "disbursement envelope" that it had at the time. "Every project went to the war room where it would be an issue of prioritisation and impact – we would plug the gap only if there was no one else to fund the project or to be additive in collaboration with other donors and the project was of high tangible impact. We also kept within our financial resources by co-funding several projects, rather than committing to fund them on our own. Good examples of this are the

Sisonke implementation study [6] and our technical and human resources support to the NDoH, where we collaborated with other donors including government" (Ngubane, 2022).

By September 2020, the Fund had allocated R1.980m to the health pillar, of which R1.156m had been disbursed (The Solidarity Fund/interim impact report, 2020). (See **Exhibit 6** for more details of these disbursements.)

The humanitarian pillar

Ghebreyesus had warned that countries should strike a balance between protecting health and minimising economic and social disruption, as imposing lockdowns would inevitably have economic fallout. One of the consequences, particularly in a country like South Africa, would be food insecurity. The General Household Survey of 2018 indicated that even prior to the pandemic, around one-fifth of South African households had limited access to food. During the pandemic, this figure more than doubled (The Solidarity Fund/interim impact report, 2020).

While gender-based violence (GBV) was not initially part of the humanitarian response pillar, it became evident during the hard lockdown that isolating people in their homes had exacerbated the problem. Enthoven explained that the Fund decided this was an area to which it could respond in a meaningful way. "The question for us wasn't always: is there a big crisis, but rather is there a big crisis that we can do something about? We couldn't lean into every crisis, so we had to choose interventions where we could have an impact at national level. If we responded to every NGO's needs, we would be pulled in a thousand different directions, so we had to be super-focused" (Enthoven, 2022).

He said that the food and GBV interventions typified the Fund's role, noting that both issues preceded the pandemic but were exacerbated by it. "Our view was that we didn't have the resources to deal with either issue in any meaningful way over a long period of time, but we could soften the short-term impact by moving quickly while government mobilised" (Enthoven, 2022).

Tlou explained that the Fund started by distributing food parcels in May 2020, but soon realised that food vouchers would work better, as these enabled people to make their own food choices. Vouchers preserved people's dignity and were also a means of supporting local businesses in different areas (Tlou, 2022).

The beneficiary identification NGOs that had been selected by the Fund compiled databases on who needed help, and the Fund then provided grant funding to the NGOs to purchase, disseminate and monitor voucher redemptions. Beneficiaries could redeem these at partner retail stores. "An unexpected challenge we had was that some people regarded the vouchers with suspicion and thought they might be a hoax. We have even had some attempts by fraudsters to impersonate the Fund. As a result, we initiated a fraud hotline on our website," Tlou added (Tlou, 2022).

The Fund worked with NGOs and the government to map poverty levels across the country and determine where the greatest needs were. To address the food crisis in the rural areas and following the success of the fund vouchers, which were largely distributed in urban and peri-urban areas, the Fund introduced a farming input voucher project. "We ended up being a social player," observed Serobe. "We were saying that people must take responsibility for their own food in a permanent way. We worked with traditional leaders in the rural areas, as they knew what was happening there, as well as with churches" (Serobe, 2022). The Fund provided vouchers for seed and farming equipment for small-scale farmers which they could redeem from retailers. "One of the things that we cracked was making sure that the system worked well both at the front and the back ends," noted Tlou, adding: "The department of agriculture has subsequently used a similar system for its subsistence farmer programme in 2021/22" (Tlou, 2022).

Tlou also pointed out that GBV organisations were involved in a range of activities, such as educating the public through community dialogue, dealing with medical and mental health aspects of GBV and advising on legal remedies. The Fund hoped that its interventions would have a double impact by enhancing the day-to-day work of the sector but also by assisting the smaller NGOs to build up their systems and by providing them with grant funding to enable the continuity of their work through the various lockdown stages, at a time where the incidence of GBV had increased as a result of the lockdowns (Tlou, 2022).

By September 2020, R412m had been allocated to the humanitarian pillar and R129m of this had been disbursed (The Solidarity Fund/interim impact report, 2020). (See **Exhibit 7** for details of how this money was distributed.)

The communication and behavioural change pillar (the solidarity campaign)

The communications and behavioural change pillar played an important role throughout the pandemic. It was set up to galvanise solidarity and to share information on the disease and how best to respond to it, but most importantly to encourage the behavioural change necessary to stem transmission of the virus. The branding with its distinctive logo of raised fists in primary colours was designed to establish connections with the people of South Africa and to enhance the Fund's visibility (see Exhibit 8 for logo). Together with its partners, the Fund ran TV messaging, a programme of radio advertising and supported local leaders with loudhailers that reached many rural South Africans in their own languages. One of the Fund's goals was to reduce misinformation at a time of great uncertainty and superstition (The Solidarity Fund/interim impact report, 2020).

The Fund also assisted government to set up and run a vaccine call centre which provided different levels of advice and provided support for healthcare workers. "The vaccine call centre began to offer a channel where you could ask specific questions and not just those that the scientists believed needed answering," explained Tlou (Tlou, 2022).

By September 2020, R61m was allocated to the communication and behavioural change pillar, of which R35m was disbursed (The Solidarity Fund/interim impact report, 2020). (See Exhibit 9 for details of how this money was distributed.)

Achieving agility and good governance

Serobe pointed out that the Fund's task was to augment the actions of the government which had asked for help because its own systems were not designed for a rapid response. She described the relationship with government as critical. "I won't say there were no issues but there was a willingness to make it work. We had to indulge the many layers of government which often made processes slower – things went first to the NDoH, then to the province, then the district hospital and the MEC for health may get involved. … But we didn't have drama and we could get each other into a room" (Serobe, 2022).

Nzimande pointed out that "agility is well-oiled when you have good governance to go with it." Sangweni said that the Fund could not have been as Agile or worked with the speed that it did without dedication from the leaders: "The commitment of the board and the executive team to agility was unbelievable. It was the daily meetings […] The willingness of the board members to be available for quick decision-making, quick action and quick change of direction […] The commitment and availability of that top layer is where the heart of agility lies," she said. Nzimande described the Fund as "the most extraordinary structuring that I have come across. The top executives showed unbelievable commitment to excellent execution and a deep sense of responsibility" (Nzimande & Sangweni, 2022).

Brewer pointed out that the Fund's agility had to be seen in the context of its scale and its desire to achieve the robust governance needed to foster trust in the Fund. The Fund was not as nimble as a small organisation, but it was able to mobilise large-scale projects at

speed whilst remaining transparent and accountable. “It was also rapid and agile in the way that it changed and adapted. For example, as the pandemic waves became more predictable and the medical community was no longer feeling overwhelmed by patient load, the Fund slowed its efforts on helping with PPE and broadened its focus beyond ventilators with respect to hospital equipment so as to strengthen the health system response, while trying to understand what would come next. And then it became evident that the vaccine programme was the new priority” (Brewer, 2022).

The vaccine programme

Scientists started research on COVID-19 vaccines from early 2020, but had made no promises on quick success, particularly as the shortest vaccine development and approval time ever had been four years – for the mumps vaccine in the 1960s (Ball, 2020). This time, however, because of the scale of the COVID-19 pandemic, governments, the private sector and philanthropists all pumped large amounts of money into research. As a result, the German pharmaceutical company Pfizer BioNTech produced a vaccine approved for emergency use on 2 December 2020. This was an mRNA [7] vaccine, administered in two doses three to six weeks apart, that had to be stored and transported at temperatures of about −70°C [8]. Not long thereafter, a vaccine developed by Moderna in the USA (also mRNA and administered in two doses four weeks apart) was approved, as was the AstraZeneca vaccine, which was a viral vector [9] vaccine developed by Oxford University and administered in two doses 8–12 weeks apart. This vaccine could be stored and transported in ordinary fridges. Pharmaceutical company Johnson & Johnson developed another early viral vector vaccine. It had the advantage of being a single-dose vaccine. The Chinese Sinovac vaccine was an inactivated vaccine [10] that was criticised for not being as targeted as the others and therefore less effective (Klobucista, 2022).

Anticipating supply constraints of vaccines, the WHO collaborated with the Coalition for Epidemic Preparedness Innovations (CEPI), Gavi (a global vaccine alliance bringing together private and public sectors to increase equitable and sustainable use of vaccines) and UNICEF, to establish COVAX – “to accelerate the development and manufacture of COVID-19 vaccines and to guarantee fair and equitable access for every country in the world” (WHO, n.d./COVAX). Serobe pointed out that “there was a time when we in South Africa felt we weren’t being prioritised in the vaccine queue, and vaccines had quickly become a political thing with different countries holding and purchasing more than they needed”. To get into the COVAX queue for a share of the vaccines allocated to developing countries, those countries had to pay a deposit before 15 December 2020. When the government was unable to pay the deposit in time, it requested the Fund to assist by making the payment urgently. “We were happy to do this, as we didn’t want to lose our spot in the line of recipients,” said Serobe. The Fund made the payment of R327m (US$22m) in late December 2020 with extensions having been granted to South Africa (Serobe, 2022).

Serobe recalled the discussions that had taken place within the Fund at the time: “Initially, we thought it wouldn’t be a bad idea for government to use the facilities and relationships of business to procure vaccines, as they were coming from commercial pharmaceutical companies where, for example, organisations like Discovery already had relationships in place. We also thought that business would be more agile in making procurements at a time when supply was constrained.” However, the companies producing the vaccines made it clear that they would only speak to governments or their nominated agents so that avenue closed early on (Serobe, 2022).

Ngubane added, “We at the Fund knew that developed countries were already purchasing more vaccines than they needed for their populations, and we were working with actuaries and our reference groups to model what the vaccines would cost and how many were needed in South Africa to achieve so-called herd immunity, which required 67% of the population to be vaccinated, the goal at the time.” She pointed out that administering

vaccines to an entire population was unprecedented, and that "a different model was needed from the government's current immunisation programme that was only geared towards children" (Ngubane, 2022).

By mid-January 2021, Serobe said that government had made it clear that it was going to lead on the procurement of vaccines and on the rollout of the vaccine programme. "We had to settle for the fact that when it comes to vaccines, we will do the peripheral things around them" (Serobe, 2022).

How should the fund assist?

Once the government closed the door on the Fund playing any role in the procurement of vaccines, the debate within the Fund centred on what role it could play in the rollout of the vaccine programme. No vaccination programme of this scale had ever been rolled out before, and it would present enormous logistical challenges. There was also a lot of suspicion and misinformation about COVID-19 vaccinations circulating on social media that would need to be addressed. The Fund still held a large amount of the public's money that it needed to spend responsibly. Serobe wondered where the Fund could have the most impact and add the most value to the government's vaccine programme. Reflecting on this, Serobe considered which Agile methods and techniques the Fund could effectively apply to tackle its next big challenge.

Keywords:
Agile project management,
African philanthropy,
COVID-19,
Crisis management,
Non-profit organisation,
Social innovation,
Social impact,
Strategy,
Project management,
Strategic management

Notes

1. Gloria Serobe is a businesswoman best known as a co-founder of Women Investment Portfolio Holdings (Wiphold) – the first women's investment group established post-1994 to list on the Johannesburg Stock Exchange. She serves on several boards including Old Mutual and Nedbank and is a member of the Presidential Economic Advisory Committee. [Source: Nelson Mandela University (2021)]
2. Adrian Enthoven is executive chairman of Yellowwoods, a European-based private investment group. He serves on the boards of the group's South African-based businesses, including chairing Hollard Insurance and Spier. He is involved in various projects in youth employment, education and the arts, serving on the boards of a number of these organisations. [Source: (Africa Leadership Initiative, n.d.)]
3. BUSA was the first representative and unified organisation for business in South Africa and began operating in January 2004. It represents business across a wide range of bodies, groups and processes. [Source: BUSA (2024)]
4. "The National Economic Development and Labour Council (Nedlac) is the vehicle by which government, labour, business and community organisations seek to cooperate, through problem-solving and negotiation, on economic, labour and development challenges facing the country." [Source: Nedlac (2024)]
5. The Hollard Group is a large insurance company of which Enthoven was chair.
6. A research study conceptualised and led by Professor Linda-Gail Bekker, director of the Desmond Tutu HIV Centre, and Prof Glenda Gray, president of the Medical Research Council, that was conceived after the roll-out of the Astra-Zeneca vaccine stalled because of efficacy concerns, and which aimed to vaccinate South Africa's healthcare workers using the single-dose Johnson & Johnson vaccine while the approval process for roll-out of the two-dose Pfizer vaccine was underway. Just under 480,000 healthcare workers were vaccinated between mid-February and mid-May 2021 as part of this study. [Source: Khoza (2021)]
7. These use the virus's genetic material (RNA) to prompt the body to create antibodies. [Source: Klobucista (2022)]
8. This was later changed to storage for up to one month in a normal fridge. [Source: Karim and Van Dyk (2021)]
9. These use a modified version of a different virus to prompt an immune response in the body. [Source: Klobucista (2022)]
10. These vaccines use "killed" COVID-19 viruses to prompt a response. [Source: Klobucista (2022)]

11. Endemic disease is consistently present but limited to a particular region, for example, malaria. A pandemic occurs when a disease's growth is exponential and covers a wide area, affecting several countries and populations. [**Source:** Columbia School of Public Health (2021)]

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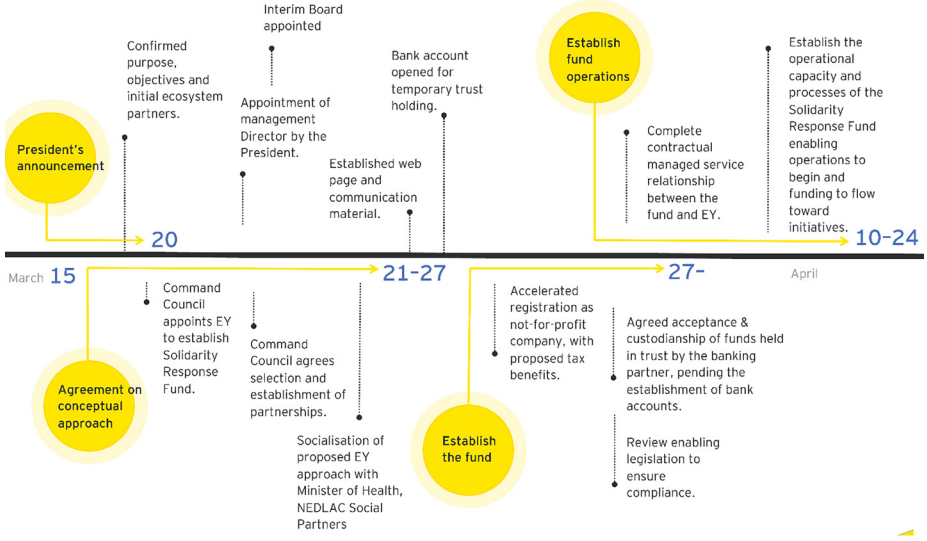
Exhibit 1. EY draft timeline

Figure E1



Source: Personal email correspondence with Grant Brewer, 11 July 2022

Exhibit 2. Members of the board as at August 2022

Tandi Nzimande, Chief Executive Officer

Nzimande is a chartered accountant (CA) who started her career at Deutsche Bank. After many years of experience in the business world, she became a trustee of the Hollard Foundation Trust in 2013 and worked on a number of its social upliftment programmes. She is on the board of FirstRand, a trustee of the FirstRand Empowerment Foundation and a fellow of the Africa Leadership Initiative.

Dr Ayanda Ntsaluba, Chair of the Disbursements Committee

Ntsaluba is a group executive director of Discovery Limited and a former Director General of Health. He is a medical doctor who has served on a number of statutory bodies including the board of the Medical Research Council and the Health Professions Council of South Africa.

Thulani Tshefuta

Tshefuta is the overall convenor of the Nedlac Community Constituency and serves on a number of boards, including PSETA, UIF and Proudly South African.

Tryphosa Romano, Chair of the Audit and Risk Committee

Romano is a Chartered Accountant (CA) with extensive experience in financial services and other key economic sectors. She was CFO of PPC for nine years and prior to that occupied other senior executive positions and directorships. She also served in government with the National Treasury.

Sizwe Nxasana, Chair of the Fundraising Committee

Nxasana is a social entrepreneur who recently founded Future Nation Schools. He was previously CEO of Telkom SA and FirstRand Banking Group. He was a founding partner of the accounting firm Sizwe Ntsaluba Gobodo (subsequently SNG – Grant Thornton). He serves as chairman on various foundations and trusts.

Kgomotso Makhupola

Makhupola is national treasurer at the National Health, Education and Allied Workers' Union (NEHAWU) and a trustee of the NEHAWU National Provident Fund. She is a board member of the Government Employment Pension Fund.

Professor Michael Katz

Katz is the chairperson of ENSafrica, specialising in corporate and commercial law. He is a former member of the FSB legislative committee and chairperson of the National Housing Finance Corporation. He chaired the commission of Enquiry into South Africa's tax system and the specialist commission on company law. He is the trustee of numerous trusts.

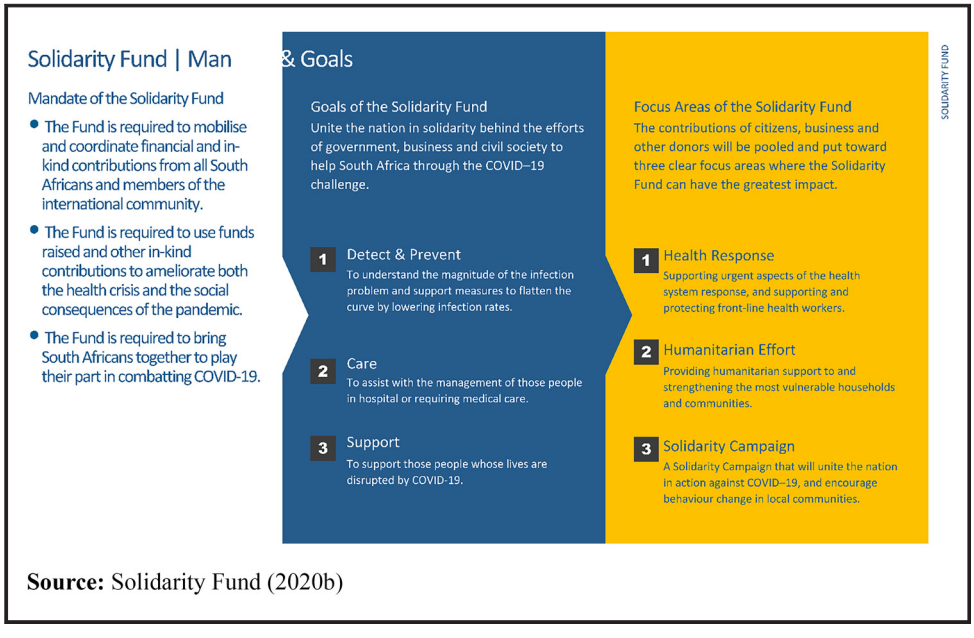
Minister Ebrahim Patel

Patel was appointed as Minister of Trade, Industry and Competition in May 2019. For ten years prior to that he served as South Africa's Minister of Economic Development.

Source: Solidarity Fund (2020c)

Exhibit 3. The fund's mandate and goals

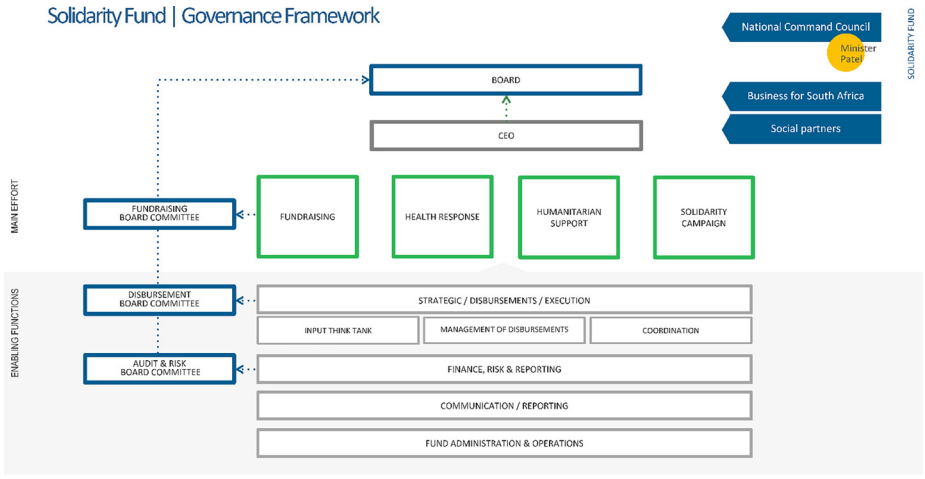
Figure E2



Source: Solidarity Fund (2020b)

Exhibit 4. The fund's governance structure

Figure E3



Source: Solidarity Fund (2020b)

Exhibit 5

Table E1 List of top 10 donors to the fund

Donor	*R in millions*
Mary Oppenheimer and Daughters	1000
Naspers Limited	500
The Elma South Africa Foundation	250
The Hasso Plattner Foundation	100
The South African Government	100
Anglo American/De Beers	88
UK Department for International Development	82
Allan and Gill Gray Philanthropy Limited	50
National Lotteries Commission	50
Telesure Investment Holdings	50

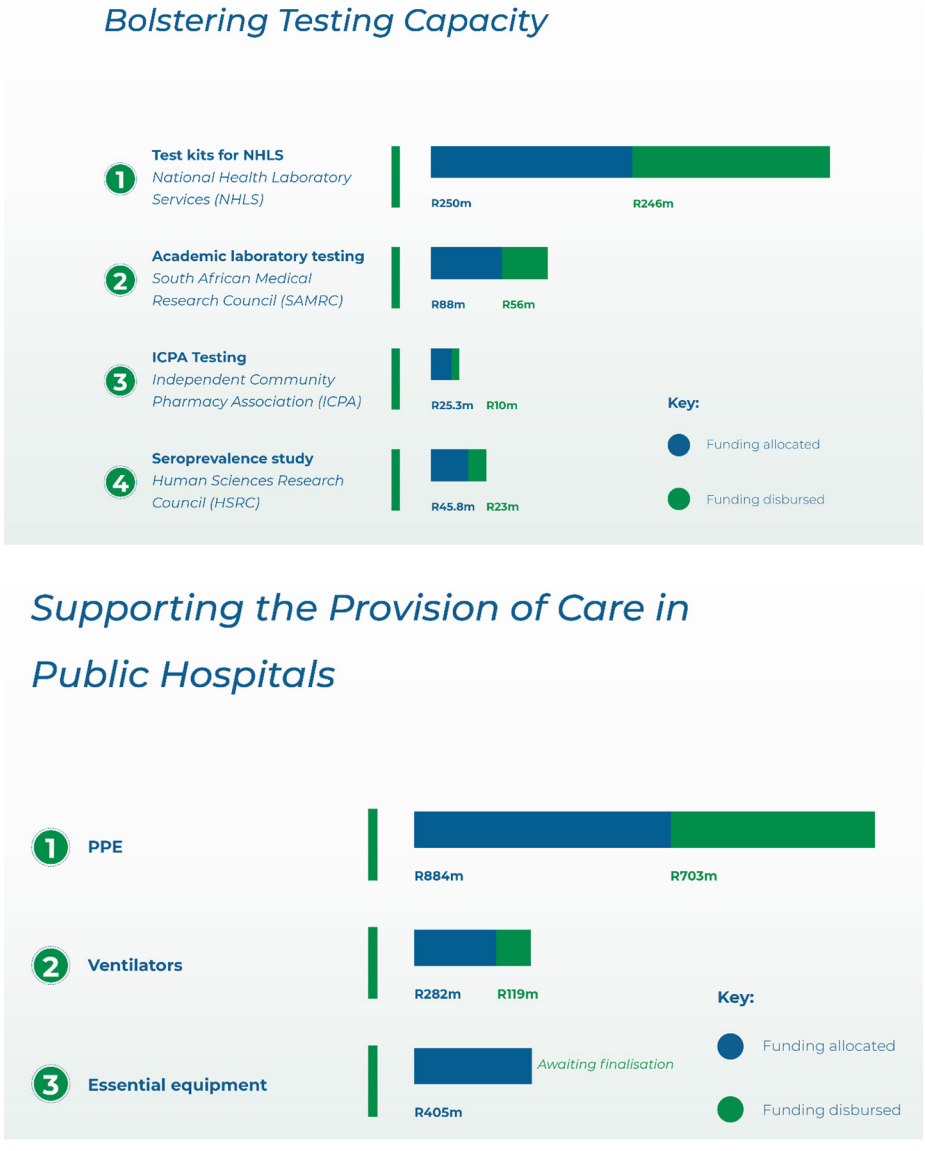
Table E2 Top 10 payroll giving

Donor	*R in millions*
Economic Freedom Fighters	15
South African Government	8.5
Coronation Fund Managers	4.5
Siemens	3.4
Safika Holdings (Pty) Ltd	3.0
ANC members of Parliament	2.9
Capitec Bank	2.8
Yellowwoods	2.5
Goldfields/ GFL South Deep	2.5
AngloGold Ashanti Limited	2.4

Source: Solidarity Fund (2021)

Exhibit 6. Funds disbursed by the health pillar – 30 September 2020

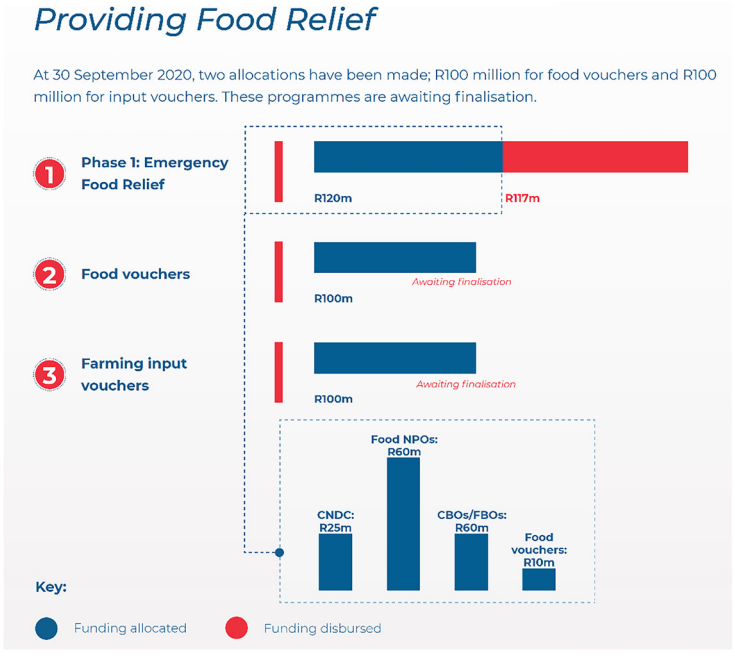
Figure E4

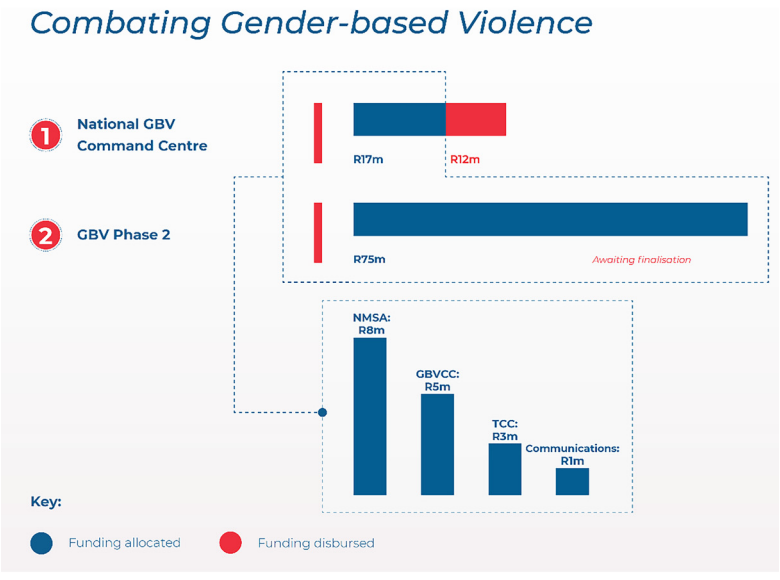


Source: The Solidarity Fund (2020a)

Exhibit 7. Funds disbursed by the humanitarian pillar – 30 September 2020

Figure E5

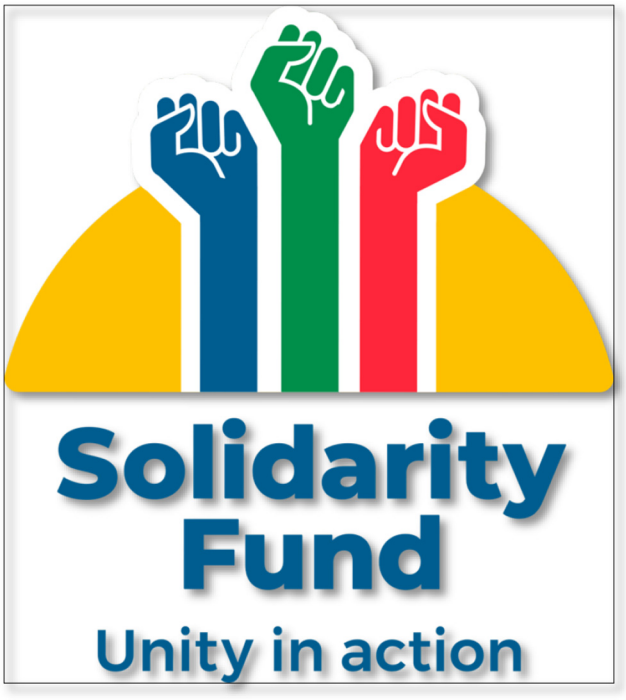




Source: The Solidarity Fund (2020a)

Exhibit 8. The Solidarity Fund logo

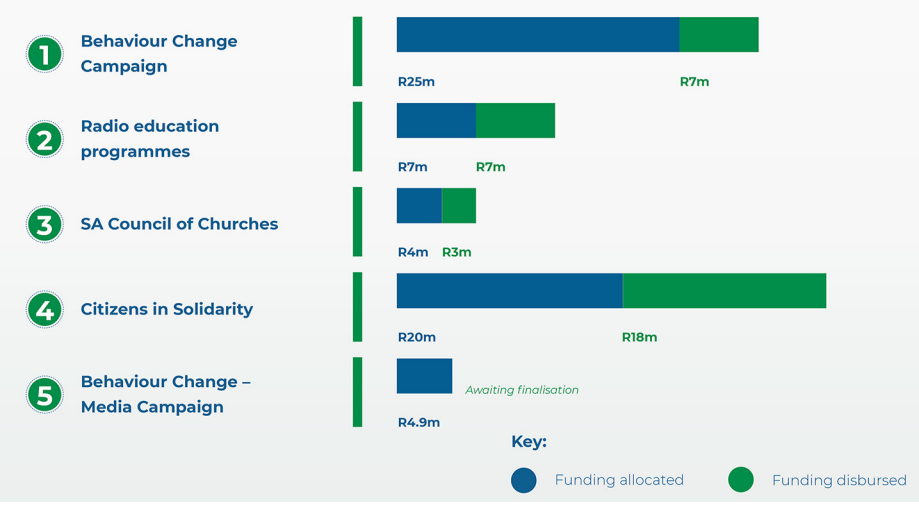
Figure E6



Source: Personal email correspondence with Mariska Pieterse, 22 November 2022

Exhibit 9. Funds disbursed by the behaviour change pillar – 30 September 2020

Figure E7



Source: The Solidarity Fund (2020a)

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Teaching notes

Keratiloe Mogotsi, Amanda Bowen and Clare Mitchell

Synopsis

Chaos, crisis and confusion: the three "C"s that succinctly condense the status quo during the COVID-19 pandemic. The roles and contributions of non-profit organisations gained recognition as countries worldwide responded to the crisis to save lives and livelihoods.

In South Africa, there was a sense of urgency and considerable pressure for a multi-stakeholder approach led by government to save as many South African lives as possible. The conditions, however, were the opposite of traditional project management methodologies that advocate for the management of the triple constraints, namely, cost, time and scope.

How could cost be managed in a project without a set budget and which was reliant on philanthropy? How could time be managed without a set deadline and tackling an invisible enemy – a virus that changed dynamics on a daily basis and how could scope be managed in a context where the future was increasingly uncertain?

It is important to note that, although the COVID-19 pandemic prompted the extraordinary emergency response in this case study, the focus is on Agile methodology which can be used across a range of crisis and non-crisis contexts.

Research methods

The case study is based on primary data sources in the form of field interviews with key informants from The Solidarity Fund. In addition to the interviews, secondary data was obtained from available published sources relevant to the case study. These published sources include organisational documents, industry reports and news articles.

Case study teaching purpose

Traditional project management methodologies are anchored in the Project Management Body of Knowledge (PMBOK) framework and revolve around theories of management, planning and execution. However, these have been deemed insufficient in practice when managing situations of high uncertainty and change (Fernandez and Fernandez, 2008). This case study focuses on a non-traditional project management environment which arose from a global crisis and introduces students to the broad theoretical and methodological content of Agile project management in a non-profit context. Using Agile project management phases as a lens – including cross-functional collaboration, quick thinking, rapid decision-making and adapting to change as experienced by The Solidarity Fund – the case study provides students with the practical context of viewing Agile project management at work in a philanthropic setting.

Theoretical framework

The case study is suitable for multiple disciplines at a postgraduate level. It can be utilised for students in the fields of development and non-profit studies, health care and health policy, management, project management, philanthropy and social innovation. Typical students would include those studying for a postgraduate diploma in management (PDM), master of management (MM) or master of business administration (MBA). In the field of health care, it may be particularly useful for students studying for a MBA in healthcare management (MBA-HM), a master of public health systems and policy (MPH) or a master of epidemiology (MSc Epi). The case study is also suitable for short courses offered to middle and senior managers and executives as part of an executive education offering.

The theoretical framework presented is grounded in Agile project management. Originally founded by software developers to speed up processes, the Agile "manifesto" is now used in various sectors and is particularly useful in adapting to environments characterised by constant change. Agile project management is thus assessed in this case study in the context of a non-profit organisation in a South African setting facing a crisis during the COVID-19 pandemic where there was no budget (cost), clear timelines or scope of work typical of traditional project management settings. Although Agile project management in the philanthropic sector is not popular in the literature, there have been studies advocating

for its use in development work. Non-governmental organisations (NGOs) and non-profits can improve how they work by applying Agile and Lean principles derived from continuous improvement of operations to help enhance efficiency and effectiveness.

It should be noted that the efficiency and adaptability of Agile principles is fundamentally different to traditional, older project methodologies such as the Waterfall methodology thus students need to be sensitised to the principles of traditional project management versus Agile. Agile project management focuses on an iterative approach to planning and guiding project processes by breaking the processes down into smaller cycles known as iterations. Agile project management thus enables project teams to work quickly and collaboratively on a project while also being able to adapt to changing requirements (Gillis, Torode and Pratt, n.d.). Lean refers to providing what is needed (maximising value) with the minimum amount of materials, equipment, labour and space. Thus, Lean is a way to reduce waste and utilise fewer resources. These terms, in nonprofit settings, encompass the thinking used to help people and communities suffering from crises such as disasters (Parris, 2019).

Cozzolino, Rossi, and Conforti (2012) conducted a case study in Sudan with the World Food Programme (a United Nations Agency) to devise an Agile and Lean framework for a humanitarian supply chain after a crisis event (this could include a global pandemic). They reported that:

- Agile principles are suitable to address the extreme conditions of a humanitarian emergency. However, Lean principles may also be useful. While agility supports effectiveness and speed, leanness focuses on efficiency and cost savings.
- Agile principles can be used to guide the restoration stage in the immediate response and aftermath of any disaster or crisis event in accordance with the urgency that is often required in crisis events.
- Lean principles can be used to guide the reconstruction stage – the process of fixing and recovering infrastructure – in accordance with the efficiency required to help build resilience and restore livelihoods.

Using innovative tools and re-thinking operations are fundamental to implementing change in the philanthropic sector, and if well done, it can make a positive structural and systematic difference to people who are poor, excluded and risk-prone (Fowler, 2000). Furthermore, donors and funders require accountability and evidence of results which can be exhibited through the use of Agile principles (Fowler, 2000).

Learning outcomes

The learning outcomes focus on enabling higher-order learning for students to critically assess Agile project management in philanthropic settings, specifically:

1. compare and contrast Agile project management versus traditional project management in the context of a non-profit organisation (The Solidarity Fund) during a crisis;
2. discuss and evaluate the role and contribution of philanthropy during times of crisis;
3. rate the value additions and contributions of Agile approaches in philanthropy;
4. evaluate the phases of Agile (unconventional) project management executed by The Solidarity Fund; and
5. develop a review of the impact of the work done by The Solidarity Fund in terms of the approach that the Fund used. How effective/not effective was it?

Core readings

- Bahadory, A., Bodell, M., Davis, K., Freney, M., Laskowski, E., Long, A., & Zech, T. (2019). Humanitarian aid under stress: Assessing the role of NGOs. Retrieved from https://digital.lib.washington.edu/researchworks/handle/1773/43773 (Relevant to learning outcome 2. Discusses the contributions and importance of NGOs during crisis situations and the different stakeholders at play).

- Cozzolino, A., Rossi, S., & Conforti, A. (2012). Agile and lean principles in the humanitarian supply chain. The case of the United Nations World Food Programme. *Journal of Humanitarian Logistics and Supply Chain Management*, *2*, 16–33. (Relevant to learning outcomes 1 and 4. Analyses Agile principles and highlights the usefulness of the principles in non-profit contexts).
- Fernandez, D. J., & Fernandez, J. D. (2008). Agile project management – Agilism versus traditional approaches. *Journal of Computer Information Systems*, *49*(2), 10–17.

(Relevant to Learning Outcomes 1 and 4. Provides an overview of Agile project management and compares it to traditional project management).

- Fowler, A. (2000). NGO futures: Beyond aid: NGDO values and the fourth position. *Third World Quarterly*, *21*(4), 589–603. (Relevant to learning outcome 2. Reviews the role of non-profit organisations and demonstrates how the changes to how NGOs work have been predicted since the 2000s).
- Gustavsson, T. (2016). Benefits of Agile project management in a non-software development context - a literature review. P*aper presented at the Fifth International Scientific Conference on Project Management in the Baltic Countries, April 14-15, Riga, University of Latvia* Retrieved from www.researchgate.net/publication/301517890_Benefits_of_Agile_Project_Management_in_a_Non-Software_Development_Context_-_A_Literature_Review (Relevant to Learning Outcome 3. Highlights the benefits of Agile project management. Although the context is mainly information technology, students will be able to see how the benefits can be manifested in a non-profit setting).

Recommended readings

- Bishop, M. (2013). Philanthrocapitalism: Solving public problems through private means. *Social Research*, *80*(2), 473–490. (Relevant to learning outcome 3. Provides background on philanthrocapitalism and how business principles can be applied in non-profit work).
- Ismail, D., Majid, T., Roosli, R., & Samah, N. (2014). A review of project management for post-disaster reconstruction project: From international NGOs (INGOs) perspective. *Research in Civil and Environmental Engineering*, *4*, 199–215. (Relevant to learning outcomes 1 and 2. Evaluates project management from an NGO perspective).
- Ploder, C., Dilger, T., & Bernsteiner, R. (2020). A framework to combine corporate budgeting with Agile project management. *1st Workshop on Requirement Management in Enterprise Systems Projects* Retrieved from https://ceur-ws.org/Vol-2581/aesp2020paper4.pdf (Relevant to all learning outcomes. Provides a framework for situating a set budget within Agile project management).

Students can also be directed to the following multimedia sources which should be viewed prior to the class discussion:

- Agile project management tutorial. Provides an overview of the principles and fundamentals of Agile project management (09.17 min duration).

See: https://youtu.be/thsFsPnUHRA

- Agile and Scrum in non-profits. An interview with the CEO of Scrum Inc. on the uses of Scrum practice in non-profits (14:18 min duration).

See: https://youtu.be/o_TFVIb9A-I

- Project Management: Waterfall, Agile and Hybrid Approaches. The video outlines different approaches to project management (14.45 min duration).

See: https://youtu.be/bLZ9MNwV2vE

Teaching plan and approach

It is strongly recommended that the instructor introduces the case study, core and recommended readings, multimedia resources and the case questions at least seven to ten days before the class session to enable adequate preparation. Students are expected to read and assess the materials individually for comprehension and in syndicate groups for class discussions. Syndicate groups should be small (no more than four participants) to enable effective discussion and analysis.

The teaching plan can be adjusted by the instructor depending on the size of the class, the time available and whether the instructor is teaching in person or online. While the teaching plan is designed for a 90-min session, the instructor can reduce or expand on the various sections based on the needs of the students. During the in-person or online session, students will be expected to work individually and in syndicate groups. (see Table 1 for the 90-min teaching plan).

Please note that pre-reading and preparation is mandatory, as the 90-min teaching plan assumes that students have read the case and worked through the readings and multimedia resources. It is also essential that students familiarise themselves with Agile project management methodology through the core and recommended readings and the multimedia resources. Students need to understand that central to Agile methodology is the principle of adopting an iterative approach that packages work tasks into manageable chunks through the following process:

- *Envisioning*: determining the vision of the change or actions required;
- *Speculating*: reviewing suggestions and process optimisation;
- *Exploring*: evaluating options, testing and obtaining inputs;
- *Adapting*: amending the design to incorporate feedback; and
- *closing*: concluding the project.

Table 1 The 90-min teaching plan

Allotted time	*Area to be covered*
10 min	The instructor introduces the case study, either online via MS Teams or Zoom, or in person. The students can be asked to briefly describe the impact of the COVID-19 pandemic worldwide across various sectors such as agriculture, hospitality and tourism, retail and wholesale, import/export, health and the workplace *Instructor's note:* In the case of online teaching, the chat feature in MS Teams and Zoom can be used to bring students into the conversation by asking them to comment on topics discussed
10 min	The instructor (and student volunteers) summarises the main points of Agile project management methodology and contrasts with traditional project management methodologies. When discussing the case questions, students should be able to apply the various elements of Agile project management and provide examples of how the Solidarity Fund navigated the envisioning, speculating, exploring, adapting and closing phases.
30 min	The instructor divides the students into syndicate groups, either online or in person. If the split results in more than four students in a group, the instructor can reshuffle to ensure the groups are small enough for effective engagement. At least five groups should be created. Allocate one case question per group for the group discussion Give the groups 30 min to discuss and prepare a report back or brief presentation for the class. Students need to apply the facts of the case study and Agile project management methodologies to the case questions when preparing their report back and/or presentations *Instructor's note:* For online sessions, instructors can make use of the Breakout Rooms function in MS Teams or Zoom
30 min	Allow each group 5 min to present or report back to the class, either online or in-person. Instructors have two choices for the feedback loop: either allow each group to present then provide consolidated feedback for all or allow each group to present and provide individualised feedback at the end of each presentation (approximately 2–3 min per group in such an instance)
10 min	In conclusion, the instructor summarises the key learning points while covering the main points of the case study and the syndicate group discussions. During this summary, the instructor should ensure that the various elements of Agile methodology are described and reinforced. Finally, the instructor should relate the key learning points to the learning outcomes so that students can assess whether they have achieved the learning outcomes

Case questions

Question 1: Compare and contrast Agile project management techniques with traditional waterfall project management techniques. In your answer, include relevant quotes from the case study to illustrate your point and make reference to the project management triple constraints of cost, time and scope.

Question 2: With reference to The Solidarity Fund and using examples from the case study, reconstruct and explain the experienced instances of the "envisioning" stage of Agile project management methodologies within a non-profit, crisis context.

Question 3: The Fund had to adopt innovative resource mobilisation through various forms of philanthropic giving. Identify and discuss some of the resource mobilisation strategies. Was the Agile approach helpful in this regard? If so, how?

Question 4: Analyse and argue the contributions of Agile approaches in philanthropic settings using examples and quotes from the case study.

Question 5: Appraise the impact of The Solidarity Fund taking into account the project management triple constraints of time, cost and scope. In your answer, include what the constraints would be in an uncertain, non-profit context.

Question analysis

Q1. Compare and contrast Agile project management techniques with traditional waterfall project management techniques. In your answer, include relevant quotes from the case study to illustrate your point and make reference to the project management triple constraints of cost, time and scope.

Students should compare Agile project management techniques to traditional project management techniques from the beginning to the end of the project and outline the differences in methodology (refer Table 2). Answers can be in written format. However, this question can be completed as a pair or as group work if time permits or if the class is small. Satisfactory answers will also highlight the triple constraints and identify these from the case study (refer Table 3).

Q2. With reference to The Solidarity Fund and using examples from the case study, reconstruct and explain the experienced instances of the "envisioning" stage of Agile project management methodologies within a non-profit, crisis context.

References have been provided at the end of the teaching note and can be shared with students. To encourage scholarly practice, in their answers students should include a minimum of three to four references from the readings provided in the reference list and any additional references that they may find. The mark allocation for each question is at the discretion of the lecturer; however, reward the use of Agile theory and application of examples from the case study. Note that students need to evaluate the effectiveness of these strategies and an Agile mindset as per the case study.

Figure 1 highlights the different elements of Agile project management methodology. To assist instructors, the elements of the Agile model are paired with the learning outcomes of the case discussion as follows:

With clear emphasis on the uncertainty that prevailed during the COVID-19 crisis, students need to explore the manner in which the Solidarity Fund was set up and highlight these phases and examples from the case study. Students should acknowledge the various phases of the methodology in their response before zoning in on the envision stage.

Envisioning stage

During the first hard lockdown in South Africa, there was a great deal of uncertainty. This made it difficult to apply traditional project management methodology, as such uncertainty called for adaptation and speed as every day seemed to bring new challenges. This uncertainty, an important aspect in the envision stage, is cited in the case study; for example, Enthoven spoke of the fear and uncertainty that prevailed at the time saying, "There was this sense that a tsunami is coming at us but we're not sure when. We were woefully unprepared for what was about to arrive and there was an enormous sense of urgency."

Table 2 Agile techniques versus traditional waterfall project management

Project steps	*Agile techniques from the case study*	*Traditional waterfall project management*
Clarifying the scope of the project	Creation of a vision With Agile techniques it is not so much about the exact product definition but more so the vision. The vision of the Fund is outlined in Exhibit 3 of the case study (The Fund's Mandate and Goals)	Development of a project charter
Deciding what is important	Whilst clear scope statements are the norm in traditional project management, iterations begin here as experienced by the Fund – in defining its mandate, appointing a board, choosing partners and choosing three pillars of focus for the Fund (health, humanitarian aid and communication and behavioural change)	Project scope and creation of project management plan
Planning the delivery of tasks	The ball was in motion and constantly moving. The Fund leadership met on a daily basis to re-examine priorities and aid rapid response. The daily meetings with the board and good governance played a key role to ensure the Fund was effective as priorities changed from PPE procurement to vaccination due to the leadership keeping a finger on the pulse of developments in the country. For example: *Sangweni said, "The commitment of the board and the executive team to agility was unbelievable . . . daily meetings accommodated both agility and good governance. The willingness of the board members to be available as and when required for quick decision making and quick action placed pressure in the system for work to be done at that pace*"	Creation of the work break-down structure and highlighting milestones
Manage stakeholders, planning quality, costs, communication	The planning was iterative and moved with changing circumstances. Because of the Fund's close partnership with government, it was able to respond to changing priorities. Stakeholders, communication, and quality were, therefore, moving targets. For example: *Brewer pointed out that the Fund's agility had to be seen in context: it was not nimble and Agile in the speedy sense of a small organisation, but it was able to mobilise large-scale projects at speed"*	Planning in terms of costs, stakeholders, quality management, risk planning and communication
Project execution	Change was imminent throughout the Fund's existence. Answers should describe how it adapted and changed its focus from PPE to humanitarian issues such as GBV and then to the procurement of vaccines and the vaccine rollout. For example: Brewer states that *"It was also rapid and Agile in the way that it changed and adapted. For example, as the pandemic waves became more predictable and the medical community was no longer feeling overwhelmed by patient load, the Fund slowed its efforts on helping with PPE and broadened its focus . . . so as to strengthen the health system response, while trying to understand what would come next. And then it became evident that the vaccine programme was the new priority"*	Integrated change control, manage and control project execution
Project completion	The goal posts for the Fund moved consistently regarding the end dates for its existence. During the vaccine rollout, government closed the doors on the Fund playing a role in the procurement of vaccines so once again it had to change focus to something else. The typical project close-out phases were, therefore, not experienced as the Fund existed longer than anticipated due to the uncertainty of the COVID-19 crisis. For example: *"The board concluded that . . . the Fund was intended as a rapid response vehicle, to augment government's response and fill the gaps"* Thus, the focus was to support the government with its crisis response even though there was no set deadline of when the crisis would end The Fund, therefore, focused on managing the crisis, and as long as	Closing phase (closing report, review lessons learnt)

(*continued*)

Table 2

Project steps	*Agile techniques from the case study*	*Traditional waterfall project management*
	the crisis mode existed, it continued to function. For example: By mid-January 2021, Serobe said that government had made it clear that it was going to lead on the procurement of vaccines and on the rollout of the vaccine programme. . . *"We had to settle for the fact that when it comes to vaccines, we will do the peripheral things around them"*	

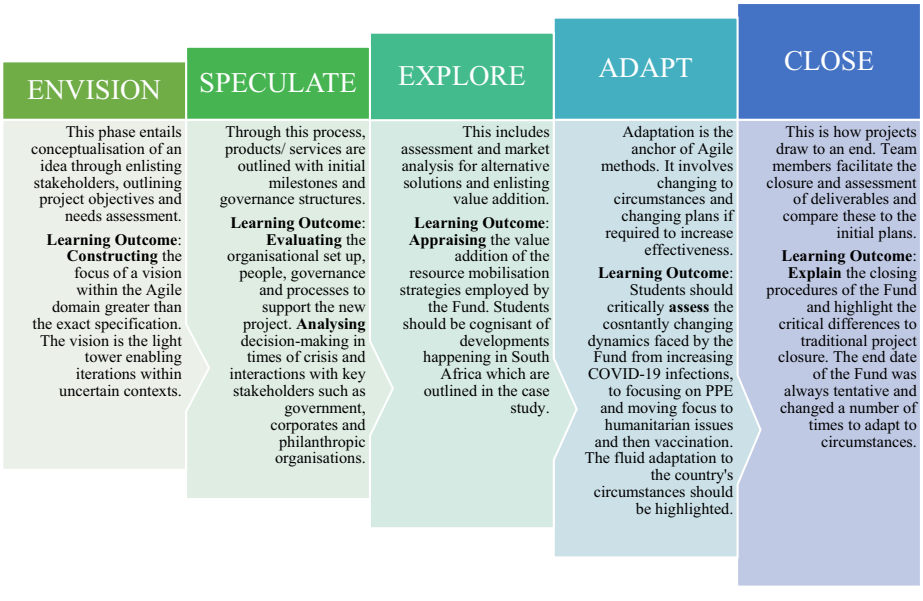
Source: Created by author

Table 3 Project management triple constraints

Project management triple constraints	*Solidarity fund reality*
Scope	The scope changed due to the constant changes typical of the COVID-19 crisis. The Fund did not have one clear scope of focus
Cost	The budget was unknown. The Fund relied on donations – the value of which was unknown
Time	The timeline was dynamic. No clear deadlines were provided

Source: Created by author

Figure 1 Visual overview of Agile project management with learning outcomes



Source: Created by author

A further uncertainty was that no one knew how long the COVID-19 pandemic would last. Kingston pointed out that when COVID-19 first broke, "no one knew how long it would last but people thought it would be for a period of about six to nine months". Traditional project management requires some sense of time and scope, but in this case, the Solidarity Fund

had neither. They did not know how long the pandemic would last and they did not know what the scope of work would be. Ultimately, the Fund benchmarked with other countries and initially set their focus on procuring personal protective equipment (PPE).

Answers should highlight the envisioning stage of the fund (which Kingston describes as "a blank sheet of paper"), the mindset of those involved and the tools and techniques employed to set up the Fund. Students can, for example, mention how the concept of the Fund was fleshed out initially by Kingston, Brewer (EY), Sita (EY) and Minister Patel and then, in detail, by the consultants on the EY team. Brewer describes how: "We brought a team of experienced consultants into our wavespace™ innovation lab to brainstorm on whiteboards and started mapping out what could be done and what this organisation might look like. We pitched back our ideas two days later, with concepts so roughly outlined that they were a combination of handwritten notes, an assembly of whiteboards and iPad screens. In the space of five days including a weekend, the concept was created."

Students can also focus on Kingston's role in creating the support framework for the Fund which involved spending a lot of time "in the early days contacting the leadership of companies and service providers to bring on board the requisite support." Kingston enlisted various business leaders to provide legal support, information and communications technology support, banking and financial support and administrative support. Kingston describes how he had worked with these business leaders in his "day job" as an investment banker and as BUSA deputy chair. . .[thus as] I thought that setting up the Fund was the appropriate and responsible thing to do [. . .] I lent on them for support." In terms of mindsets, he explains how, "Everyone, without exception or hesitation, said yes and threw resources at the project."

In terms of agility and speed, Kingston recalls that once the concept and support framework had been created, then "three exercises happened quickly":

1. ensuring that we had "the right service providers on board as a matter of urgency";
2. getting "the internal team up and running; we recognised early on that we would need dedicated fundraising capability"; and
3. identifying "suitable board members, propose them to government and get its approval, and then approach the individuals themselves."

Thus, within a short period of time, the Fund had what Kingston called the "nascent, evolving executive team which settled upon the structure, with EY being the platform who we relied upon to do all the hard work and much of the thought leadership. We were clear that the executive needed to shape the concept and that the board needed to support, sign off and endorse the concepts."

These are the typical first steps of an Agile project management mindset, that is, to set a vision (envision) and stipulate what is required (Fernandez and Fernandez, 2008).

Q3. The Fund had to adopt innovative resource mobilisation through various forms of philanthropic giving. Identify and discuss some of the resource mobilisation strategies. Was the Agile approach helpful in this regard? If so, how?

Kingston describes how he had asked Bondi (Paul) to lead the fundraising team, as he "lives and breathes in an environment where he is speaking to large corporates and institutions all the time, and we believed that the mainstay of our funding would be the corporate community." Bondi consequently developed a large-scale fundraising strategy "using influential and well-respected key account managers [who] were appointed based on their relationships with potential donors. These managers approached prospective donors and enabled bespoke donor engagement. This provided a sense of comfort amongst donors, often resulting in repeat donations." Major corporate donors included Naspers Limited (R500m), Anglo American/De Beers (R88m) and Telesure Investment Holdings (R50m). By mid-April of 2020, the Fund had over R1.2bn in its bank account.

Besides donations from organisations, fundraising for the Fund was multi-faceted with donations from:

- *Government*: The South African Government and government ministers donated to the Fund, with Ramaphosa announcing that "he and his deputy, as well as all the ministers and deputy ministers in cabinet had undertaken to donate one-third of their salaries to the Fund" over a period of three months. They were some of the first people to donate to the fund. This was helpful to set an example for the nation.

- *High-net-worth individuals*: Mary Oppenheimer and daughters donated R1bn to the Fund which set a precedent for fellow philanthropists to come on board.
- *Multilateral institutions*: the UK Department for International Development (responsible for administering foreign aid between May 1997 and September 2020).
- *Philanthropic organisations*: the Elma South Africa Foundation, the Hasso Plattner Foundation and Allan and Gill Gray Philanthropy Limited.
- *Public*: Over 300,000 individual members of the public who donated from "as little as R5 to over R1 million".

Crowd funding was also quite successful, with, for example, individuals donating to the Fund by means of their company's payroll system, donating at supermarket checkouts or via the conversion of banking reward points. This resulted in a diverse pool of funds to enable the work of the Fund.

It is important to note that underlying the mobilisation of various resources, the Fund practised good governance with regard to donations from the beginning. For example: the source of all donations was scrutinised and to "streamline this process, the Fund developed a donor policy and adopted a vetting process to identify and validate the donations received." As the Fund operated at speed, adapting to the constantly changing circumstances of the pandemic, "it decided to report back to donors through pooled systems such as quarterly media updates, a monthly newsletter, an annual report and other interim reports, all of which were published on the website." Thus, there was enormous emphasis on transparency and that the public could see not only who had donated money to the Fund but also to whom that money had been disbursed.

Was the Agile approach helpful? How?

The Agile approach – in which work is done in short cycles or sprints and in which a team meets daily to discuss current tasks and priorities and any obstacles that need clearing – enabled the Fund to operate efficiently and to augment the actions of the government. Serobe points out that the Fund had to be fast and Agile to complement the government's slower-moving processes. She explains how the Fund did this: "Exco [. . .] met every morning from 7h30 to 9h00 to process day-to-day things. We called these meetings war rooms. Then the board subcommittees had to meet weekly, which they did in the hour or two immediately before the board meetings. They had been delegated some power, so they could make certain decisions and those that needed board approval were recommended to the board at its meeting an hour or two later. Then we had a weekly board meeting every Thursday evening at 19.00, so that board approvals and resolutions didn't have to wait for long periods. We had to get the right sequence in place to ensure that the governance processes were closed and there could be no excuses for not doing things the right way because of the need for speed."

The Fund was able to be flexible and to adapt to the changing landscape. The various teams managed work tasks by regularly coming together to review and reflect whilst working on the project. An Agile approach enabled the Fund to take on an effective supporting role in a time of uncertainty with no clear budget, timelines or scope of work – and to raise a significant amount of money in a short space of time. Kingston describes how the daily meetings forced people to be productive and "to focus on what the priorities are and what outputs are required." Furthermore, the daily presence of the board chair and deputy chair in the war room provided guidance and "created opportunities for people to challenge one another and helped drive rapid decision-making."

Q4. Analyse and argue the contributions of Agile approaches in philanthropic settings using examples and quotes from the case study.

Students need to apply a critical mindset to highlight what worked and what did not work in the context of the case study. The use of the Agile approach was helpful for the Fund but not without some shortfalls.

Arguments for the Agile approach

- *Enabled quick decisions, for example, to procure PPE*: The initial hard lockdown in South Africa began on the 26 March 2020 and by the 4 April 2020, the procurement of

ventilators was completed. A quote from the case study that demonstrates this point is as follows:

"The Fund procured and distributed its first PPE on 4 April 2020 and it also managed to secure the purchase of 200 ventilators from Israel: this on the back of early clinical evidence that invasive ventilation was the best way to provide patients with oxygen support. However, as time went on evidence showed that non-invasive oxygen support was more effective, and the Fund was able to procure locally made non-invasive ventilators for use in hospitals. This process demonstrated the Fund's purpose: a rapid response vehicle, catalytic, additive and focused on a critical requirement related to the COVID-19 response."

- *Ensured multiple and diverse stakeholders could come together to derive the most suitable and feasible solutions:* The board of the Fund was diverse and interacted regularly with the South African Government and philanthropic role players. This is evidenced by the following quotes:

In terms of the board of the Fund providing solutions: "The idea was that the Fund would be independent, but that it would represent all sectors of society including business, government, labour and civil society," explained Enthoven. "While the independence of the Fund was critical, it also had to work with government in the COVID-19 response. There would be one national programme for COVID-19 run by the NDoH, and our job was to complement and support the national effort."

With regard to the diversity of the board, Enthoven describes his thoughts as they assembled the board: "I was anxious that you have a number of strong personalities and I wondered how they were going to work together. Any dysfunctionality at the board level, given how much governance oversight would be needed, and how active the board needed to be, would be the death knell of the Fund." His fears were unfounded, however. "It was an incredibly functional board, that way exceeded my expectations. Everyone had complete alignment of purpose, clarity of what our job was, and there was no attempt to overstep any boundaries, particularly in the relationship between government and the Fund. Everyone was very respectful of the independence of the Fund and what it was set up to do and what its purpose was. Every board member took their responsibilities very seriously and were extremely diligent."

- *Brought the leadership team close to the issues through daily war rooms*: The leadership kept their finger on the pulse of developments and made effective decisions instantly, as all key stakeholders were available and on board. In the case study, Serobe points out that the Fund had to be fast and Agile to complement the government's "long-winded processes", but that at the same time it had to make sure that it was not reckless. She explained how the Fund did this by means of daily meetings of the Exco "to process day-to-day things. We called these meetings war rooms." Then the board subcommittees met weekly. They had been delegated power to make certain decisions and those that needed board approval were recommended to the board at its meeting. "Then we had a weekly board meeting every Thursday evening at 7 pm, so that board approvals and resolutions didn't have to wait for long periods. We had to get the right sequence in place to ensure that the governance processes were closed and there could be no excuses for not doing things the right way because of the need for speed."

Arguments against the Agile approach

- *Not fully utilising the funds as intended*: In the case study, Serobe observes that "South Africans threw everything at the Fund [. . .] With this incredible response, we didn't want people to feel betrayed by not using the money quickly enough or by using it inappropriately." With traditional project plans, funds for a project are pre-determined, whereas in the case of the Fund, the costs of the project were constantly evolving. The Fund initially disbursed funds in four categories: "preventing the spread of the virus; detecting the level of infection; supporting the provision of care to those that were ill; and supporting those whose lives were disrupted by COVID-19." These conceptual

focus areas consolidated into three "pillars" where the Fund could have the greatest impact – the health response, the humanitarian effort and the solidarity campaign.

However, towards the beginning of the vaccine roll-out, there were funds still available that could not be used for the procurement of vaccines as the "South African Government had made it clear that it was going to procure the vaccines and lead the vaccine rollout." As a result, the Fund channelled these funds towards, for example, maintaining health facilities. As the case study does not have any content that supports the benefits of having a set budget, students will need to draw on the core and recommended readings and their own experience to outline the benefits of having a pre-determined budget to guide focus and planning. Students can be directed to Fernandez and Fernandez (2008), pages 11 to 13, and Ploder, Dilger and Bernsteiner's (2020) paper which deals specifically with the creation of a framework for combining corporate budgeting with Agile project management:

- *Constantly changing goals and focus*: The Fund had to change its focus and execution frequently. Brewer describes the Fund as: "able to mobilise large-scale projects at speed whilst remaining transparent and accountable [. . .] It was also rapid and Agile in the way that it changed and adapted." There is the possibility that the need to regularly change focus and direction makes the measurement of the impact of some of the Fund's initiatives difficult, as the various initiatives were not executed over a sustained period of time in order to develop trends and assess the ultimate impact. For example, Enthoven explains how the provision of food and gender-based violence (GBV) interventions typified the Fund's humanitarian role, however, "Our view was that we didn't have the resources to deal with either issue in any meaningful way over a long period of time, but we could soften the short-term impact by moving quickly while government mobilised."

Instructor's note: Measurement and evaluation techniques require baselines as would be the case in traditional project management. Thus, linear approaches encompassed by traditional methods can provide a baseline, which is not the case with the Agile and iterative approach (Fernandez and Fernandez, 2008). The Fund's constant shift in focus and its short-term nature, therefore, risks the creation of possible pockets of ineffectiveness and inefficiency.

- *Lack of trust in some of the initiatives:* The Fund faced various challenges revolving around trust. Kingston points out that because the initial announcement had come from the president, "there had been an unfortunate assumption that the Fund was a government initiative." Thus, due to the speed at which the Fund had to work and time constraints around familiarising people with the nature of the Fund, a great deal of time had to be spent emphasising the importance of the Fund's autonomy and that it operated independently of government and business.

During the food voucher dispersion phase, the face of the Fund was not one that many communities easily identified with due to the changing nature of the Fund and the speed at which it operated. This lack of a clear and comprehensible identity (despite the logo "to establish connections" with South Africans and the television and radio campaigns) led to some community members believing that the food vouchers were a hoax while, in other cases, fraudsters seized the opportunity "to impersonate the Fund" to steal money.

Q5. Appraise the impact of The Solidarity Fund taking into account the project management triple constraints of time, cost and scope. In your answer, include what the constraints would be in an uncertain, non-profit context.

The Fund eventually had to make difficult decisions regarding what initiatives it could and could not support as many social ills the country faced such as hunger, poverty and gender-based violence were exacerbated by the pandemic. Nevertheless, the Fund had visible impacts to report. These include:

- *Enabling the procurement of personal protective equipment (PPE) as quickly as possible:* One of the first tasks the Fund focused on was procuring PPE to keep people safe. It realised its role in providing a supportive framework for government actions which would otherwise have taken longer and acted swiftly to procure PPE. Enthoven describes the process that the Fund followed to acquire PPE: "Once the procurement team had located the PPE, the health specialists assessed the suitability of that PPE, from there it went to the war room which double-checked that the PPE was indeed

needed. We also had McKinsey providing us with a daily moving average price, as these were moving so rapidly and supply was so constrained that we didn't really know what the market price was [. . .] The war room [. . .] would only sign off once it was happy that the price was fair (given the fact that all prices were inflated). . .It was an incredibly difficult juggling act. We had to secure availability fast, as PPE was in short supply worldwide, but we didn't want to overpay. We would literally decide on the day whether a price was fair or not, and then approve the payment."

- *Addressing food insecurity:* The distribution of food parcels evolved into a food voucher programme as the Fund realised that "food vouchers would work better, as these enabled people to make their own food choices [and]. . .vouchers preserved people's dignity and were [. . .] a means of supporting local businesses in different areas." Thus, partner NGOs compiled databases on who needed help, and the Fund provided grant funding to the NGOs to purchase, disseminate and monitor voucher redemptions at partner retail stores. Following the success of the food voucher programme, the Fund introduced a farming input voucher project with a specific focus on the food crisis in rural areas. Serobe explains how the Fund became a "social player" as "We were saying that people must take responsibility for their own food in a permanent way. We worked with traditional leaders in the rural areas [. . .] as well as with churches [. . .] The Fund provided vouchers for seed and farming equipment for small scale farmers which they could redeem from retailers [. . .] The department of agriculture has subsequently used a similar system for its subsistence farmer programme in 2021/22."
- *Working with and empowering community-based organisations and expanding the civil society sector:* Community-based organisations have the advantage of being in close proximity to people affected by a particular crisis. They, therefore, hold knowledge about vulnerable members of the community and can help mobilise the community as they know the members and are often trusted by the community. The Fund worked closely with community-based organisations and relied on their assistance to mobilise some of the Fund's resources through them. Enthoven describes how: "We couldn't lean into every crisis, so we had to choose interventions where we could have an impact at national level. If we responded to every NGO's needs, we would be pulled in a thousand different directions, so we had to be super-focused." The food voucher and GBV interventions typified the Fund's role with the Fund hoping that its interventions would have a double impact by enhancing the day-to-day work of the sector but also "by assisting the smaller NGOs to build up their systems and by providing them with grant funding to enable the continuity of their work."
- *Helping South Africans to help themselves amidst the pandemic:* The Fund's greatest contribution was in helping South Africans to stand together to negotiate the pandemic. Kingston describes the Fund as "a platform for all South Africans, from the public and private sectors, civil society as well as the general public, to contribute to one consolidated effort". The branding with its logo of raised fists was designed to "establish connections with the people of South Africa".

Besides its financial role, assistance with food vouchers and humanitarian support, the Fund (together with its partners) ran TV messaging, a programme of radio advertising and supported local leaders with loudhailers that reached many rural South Africans in their own languages. This messaging focused on sharing information on the disease and how best to respond to it, but most importantly to encourage the behavioural change necessary to stem transmission of the virus such as regular hand washing, social distancing and the wearing of masks. The Fund also assisted the government by setting up and running a vaccine call centre which provided advice, support for healthcare workers and offered a channel where, according to Tlou, "you could ask specific questions and not just those that the scientists believed needed answering".

What would the constraints be in an uncertain, non-profit context?

As seen by the experiences of the Solidarity Fund, the constraints faced by project managers in an uncertain, non-profit context include not having a set budget or scope of work and not having a clear timeline. For example, the Fund did not have a budget, as it

relied on donations that could not be forecast; it did not have a scope of work, as the pandemic brought various challenges that led to the Fund changing its focus over its existence; and the Fund did not have a timeline, as it was unclear when the pandemic (and its associated restrictions) would end.

Conclusion

The case questions are designed to engage students in a critical analysis of the case facts with a focus on the use of Agile project management as a theoretical foundation which can be applied to profit and non-profit organisations. The Agile methods are assessed through the creation and delivery of South Africa's Solidarity Fund during the COVID-19 pandemic. By the end of the case discussion and analysis, students should demonstrate an understanding of how Agile principles are applicable in a non-profit, crisis scenario where budgets are not pre-determined, and timelines and the scope of work are fluid. This is in contrast to traditional project management criteria, and students should be able to identify and discuss the differences. Moreover, students should be able to discuss the key strategy pillars that the Solidarity Fund put in place, its governance structure and the innovative resource mobilisation strategies it used to manage the crisis conditions faced by South Africa during the pandemic.

Wrap up: Key learnings

Instructors can use the last 10 min of the case discussion to summarise the syndicate groups' findings for each of the case questions and highlight the key learnings which, in turn, reinforce the learning outcomes.

The learning outcomes focus on enabling higher-order learning for students to critically assess Agile project management in philanthropy, specifically, being able to: compare and contrast Agile project management with traditional project management in the context of a non-profit organisation (The Solidarity Fund) during a crisis, discuss and evaluate the role and contributions of philanthropy during times of crisis, rate the value and contributions of Agile approaches in philanthropic settings, evaluate the phases of Agile (unconventional) project management as executed by the Solidarity Fund and review the impact of the work done by the Solidarity Fund in terms of the approach it used.

Epilogue

By August 2022, two and a half years after the Solidarity Fund was formed, it began winding down its operations in preparation for closing at the end of December 2022. Serobe describes the journey of the Solidarity Fund as one of "common purpose and unity, challenges, humility, pride and hope [. . .] there is no other Fund like this, and all countries will look to it as a point of reference in the future".

Since the urgency of the initial stages of the pandemic had abated, the Fund board meetings had taken place less frequently. They had reduced to once every two weeks from late 2020, and to once a month from 2022. War rooms and Exco meetings had continued to take place two to three times a week on average in 2022 down from seven days a week. While a few large organisations continued to provide their services *pro bono*, many organisations found it difficult to continue to do so as time went by, particularly the smaller organisations.

With the national vaccine programme rolling out in earnest from 2021, the Fund had found various impactful ways to contribute to the success of the vaccine programme. As 2022 unfolded, COVID-19 in South Africa was becoming more endemic rather than pandemic in nature [11], and so the need for a vehicle like the Fund was diminishing. The National Department of Health (NDoH) was also preparing the health system for the transition from pandemic to endemic response within routine healthcare provision. In response, the Fund remained adaptive to the needs of the country, changing its focus and operations to address new needs in the South African vaccine program. These included:

- collaborating with other donors to set up a project management and coordinating office in the NDoH to help with the vaccine rollout;
- contributing R69m to an initial budget of R138m to cover the costs of staffing the vaccine programme coordinating offices within the NDoH, provincial and district health offices;

- providing funding of R51m to assist with the recruitment of additional nursing and vaccine outreach staff to implement the vaccine rollout across the Eastern Cape province; and
- allocating R171m towards supporting the expansion of vaccine outreach sites across all provinces.

The Fund was also instrumental in ensuring equitable access to vaccines. Once it became apparent that there was greater vaccine penetration in wealthier and urban areas, the Fund decided to focus on taking vaccines to the rural areas and smaller towns. For example, the Fund set up 14 temporary vaccination sites at social grant distribution points. In the span of two days, the health workers at these sites administered over 3,000 vaccines. Following this success, the NDoH and its partners, including the Fund, expanded the programme to retail centres such as shopping malls, and when that also proved effective in increasing vaccine uptake, the NDoH decided to continue with the programme. It asked the Fund to support this initiative by funding and contracting clinical operators to work at these sites. The Fund spent R97m on these projects.

The Fund worked with various partners to increase demand for and uptake of vaccines, and to address misinformation and vaccine hesitancy. The various campaigns included television commercials showing ordinary people getting vaccinated and messages on the radio in all South African languages, as well as the use of traditional, digital and community platforms. The Fund also created partnerships with corporates, government and civil society, as well as community and faith-based organisations to work in townships, urban and rural areas in an attempt to engage with all South Africans. The Fund disbursed R120m on these projects.

Several of the Fund's initiatives were designed to have an impact beyond the pandemic and to benefit South Africans long into the future:

- The rebuilding of Block 1 (accident and emergency unit) of the Charlotte Maxeke Hospital, one of the largest public hospitals in the province of Gauteng. A fire had broken out in April 2021, causing the hospital to be evacuated and entirely closed. It partially reopened in June 2021 but only operated 650 beds out of its previous total of 1,070. Its casualty facility remained closed, placing undue strain on other hospitals in Johannesburg. The Fund discussed the matter in its war room, and once satisfied that rebuilding this particular block fell within its mandate, contributed R78m to the project.
- It contributed to the upgrading of research facilities at various universities in the country and increased their testing capacities.
- It bolstered manufacturing capabilities in the country, by giving grants to two local businesses, enabling them to rapidly produce prototypes of non-invasive ventilators and embark on production.
- It provided NGOs with funding to improve their infrastructure and to teach the smaller NGOS accounting skills.

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Abstract

Title – *South Africa's solidarity fund: navigating the shores of uncertainty and crisis.*

Learning outcomes – *The learning outcomes focus on enabling higher-order learning for students to critically assess Agile project management in philanthropic settings, specifically compare and contrast Agile project management versus traditional project management in the context of a non-profit organisation (The Solidarity Fund) during a crisis; discuss and evaluate the role and contribution of philanthropy during times of crisis; rate the value additions and contributions of Agile approaches in philanthropy; evaluate the phases of Agile (unconventional) project management executed by The Solidarity Fund; and develop a review of the impact of the work done by The Solidarity Fund in terms of the approach that the Fund used. How effective/not effective was it?*

Case overview/synopsis – *Chaos, crisis and confusion: the three "C"s that succinctly condense the status quo during the COVID-19 pandemic. The roles and contributions of non-profit organisations gained recognition as countries worldwide responded to the crisis to save lives and livelihoods.*

In South Africa, there was a sense of urgency and considerable pressure for a multi-stakeholder approach led by the government to save as many South African lives as possible. The conditions, however, were the opposite of traditional project management methodologies that advocate for the management of the triple constraints, namely, cost, time and scope.

How could cost be managed in a project without a set budget and which was reliant on philanthropy? How could time be managed without a set deadline and while tackling an invisible enemy – a virus that changed dynamics on a daily basis and – how could scope be managed in a context where the future was increasingly uncertain?

Complexity academic level – *This case study can be useful for students undertaking postgraduate diploma in business, master of business administration (MBA), master of management courses.*

Supplementary material – *Teaching notes are available for educators only.*

Subject code – *CSS 11: Strategy.*